



General Assembly

Amendment

January Session, 2025

LCO No. 7932



Offered by:

SEN. LOONEY, 11 th Dist.	SEN. LESSER, 9 th Dist.
SEN. DUFF, 25 th Dist.	SEN. LOPES, 6 th Dist.
SEN. SLAP, 5 th Dist.	SEN. MAHER, 26 th Dist.
SEN. ANWAR, 3 rd Dist.	SEN. MARX, 20 th Dist.
SEN. CABRERA, 17 th Dist.	SEN. MCCRORY, 2 nd Dist.
SEN. COHEN, 12 th Dist.	SEN. MILLER P., 27 th Dist.
SEN. GADKAR-WILCOX, 22 nd Dist.	SEN. NEEDLEMAN, 33 rd Dist.
SEN. GASTON, 23 rd Dist.	SEN. WINFIELD, 10 th Dist.
SEN. HARTLEY, 15 th Dist.	REP. HADDAD, 54 th Dist.
SEN. HONIG, 8 th Dist.	SEN. MARTIN, 31 st Dist.
SEN. KUSHNER, 24 th Dist.	REP. BRONKO, 70 th Dist.

To: Subst. Senate Bill No. 5

File No. 164

Cal. No. 128

"AN ACT CONCERNING HIGHER EDUCATION AFFORDABILITY AND ACCOUNTABILITY."

1 Strike everything after the enacting clause and substitute the
2 following in lieu thereof:

3 "Section 1. Section 10a-173 of the general statutes is repealed and the
4 following is substituted in lieu thereof (*Effective July 1, 2025*):

5 (a) For the purposes of this section:

6 [(1) "Family contribution" means the expected family contribution for

7 educational costs as computed from a student's Free Application for
8 Federal Student Aid;]

9 [(2)] (1) "Student aid index" means the index used to determine
10 eligibility for financial aid as computed from a student's Free
11 Application for Federal Student Aid;

12 [(3)] (2) "Eligible student" means a student who is (A) a resident of
13 the state, (B) enrolled at an institution of higher education in a course of
14 study leading to such student's first associate or bachelor's degree, and
15 (C) carrying, for a full-time student, twelve or more semester credit
16 hours, or, for a part-time student, between six and eleven semester
17 credit hours at such institution of higher education;

18 [(4)] (3) "Independent institution of higher education" means a
19 nonprofit institution established in this state (A) that has degree-
20 granting authority in this state; (B) that has its main campus located in
21 this state; (C) that is not included in the Connecticut system of public
22 higher education; and (D) whose primary function is not the preparation
23 of students for religious vocation;

24 [(5)] (4) "Public institution of higher education" means the constituent
25 units of the state system of higher education identified in subdivisions
26 (1) and (2) of section 10a-1, except the regional community-technical
27 colleges; and

28 [(6)] (5) "Eligible educational costs" means the tuition and required
29 fees for an individual student that are published by each public or
30 independent institution of higher education participating in the grant
31 program established under this section, plus a fixed amount for
32 required books and educational supplies as determined by the Office of
33 Higher Education.

34 (b) The Office of Higher Education shall establish the Roberta B.
35 Willis Scholarship program to annually make need-based financial aid
36 available for eligible educational costs to eligible students enrolled at
37 Connecticut's public and independent institutions of higher education.

38 Within available funds, the Roberta B. Willis Scholarship program shall
39 include a need and merit-based grant, a need-based grant and a Charter
40 Oak grant. The need and merit-based grant shall be funded at not less
41 than twenty per cent but not more than thirty per cent of available funds
42 or ten million dollars, whichever is greater. The need-based grant shall
43 be funded at up to eighty per cent of available funds. The Charter Oak
44 grant shall be not less than one hundred thousand dollars of available
45 funds. There shall be an administrative allowance based on one-quarter
46 of one per cent of the available funds, but not less than one hundred
47 thousand dollars annually. The Office of Higher Education shall
48 disburse the funds appropriated or allocated for the Roberta B. Willis
49 Scholarship program for the fiscal years ending June 30, 2024, and June
50 30, 2025, to make awards pursuant to subsection (c) of this section and
51 allocate funds pursuant to subsections (d) and (f) of this section in
52 accordance with a plan developed by the office, provided the office shall
53 (1) disburse all funds allocated for the Roberta B. Willis Scholarship
54 program from the federal funds designated for the state pursuant to the
55 provisions of Section 602 of Subtitle M of Title IX of the American Rescue
56 Plan Act of 2021, P.L. 117-2, as amended from time to time, on or before
57 December 31, 2024, and (2) in accordance with subsection (f) of section
58 4-89, reserve an amount of not more than fifteen million dollars from the
59 amount appropriated for the Roberta B. Willis Scholarship program for
60 the fiscal year ending June 30, 2025, for disbursement during the fiscal
61 year ending June 30, 2026.

62 (c) The Roberta B. Willis Scholarship need and merit-based grant
63 shall be available to any eligible student at any public or independent
64 institution of higher education. The Office of Higher Education shall
65 determine qualification for financial need based on [family contribution
66 prior to July 1, 2024, and, on and after July 1, 2024, based on] the student
67 aid index and qualification for merit based on either previous high
68 school academic achievement or performance on standardized
69 academic aptitude tests. The Office of Higher Education shall make
70 awards according to a sliding scale, annually determined by said office,
71 up to a maximum [family contribution or] student aid index and based

72 on available funds and the number of eligible students who qualify for
73 an award. The Roberta B. Willis Scholarship need and merit-based grant
74 shall be awarded in a higher amount than the need-based grant
75 awarded pursuant to subsection (d) of this section. [, except for the
76 academic year commencing July 1, 2024.] Recipients of the need and
77 merit-based grant shall not be eligible to receive an additional need-
78 based award. The order of institutions of higher education provided by
79 an eligible student on such student's Free Application for Federal
80 Student Aid shall not affect the student's qualification for an award
81 under this subsection. The institution of higher education in which an
82 eligible student enrolls shall disburse sums awarded under the need and
83 merit-based grant for payment of such student's eligible educational
84 costs.

85 (d) The Roberta B. Willis Scholarship need-based grant shall be
86 available to any eligible student at any public or independent institution
87 of higher education. The amount of the annual funds to be allocated to
88 each institution of higher education shall be determined by its actual
89 full-time equivalent enrollment of eligible students with a [family
90 contribution or] student aid index during the fall semester of the fiscal
91 year two years prior to the grant year of an amount not greater than two
92 hundred per cent of the maximum [family contribution or] student aid
93 index eligible for a federal Pell grant award for the academic year one
94 year prior to the grant year. Not later than July first, annually, each
95 institution of higher education shall report such enrollment data to the
96 Office of Higher Education. Not later than October first, annually, the
97 Office of Higher Education shall (1) publish such enrollment data on its
98 Internet web site, (2) notify each institution of higher education of the
99 proportion of the annual funds that such institution of higher education
100 will receive the following fiscal year, and (3) publish the proportions for
101 each institution of higher education on its Internet web site. Not later
102 than November first, annually, the Office of Higher Education shall
103 notify each institution of higher education of the amount of funds
104 allocated to such institution for awards to eligible students during the
105 following fiscal year. Participating institutions of higher education shall

106 make awards (A) to eligible full-time students in an amount up to four
107 thousand five hundred dollars, and (B) to eligible part-time students in
108 an amount that is prorated according to the number of credits each
109 student will earn for completing the course or courses in which such
110 student is enrolled, such that a student enrolled in a course or courses
111 earning (i) at least nine but less than twelve credits is eligible for up to
112 seventy-five per cent of the maximum award, and (ii) at least six but less
113 than nine credits is eligible for up to fifty per cent of the maximum
114 award. Each participating institution of higher education shall expend
115 all of the moneys received under the Roberta B. Willis Scholarship
116 program as direct financial assistance only for eligible educational costs.

117 (e) Participating institutions of higher education shall annually
118 provide the Office of Higher Education with data and reports on all
119 eligible students who applied for financial aid, including, but not
120 limited to, students receiving a Roberta B. Willis Scholarship grant, in a
121 form and at a time determined by said office. If an institution of higher
122 education fails to submit information to the Office of Higher Education
123 as directed, such institution shall be prohibited from participating in the
124 scholarship program in the fiscal year following the fiscal year in which
125 such institution failed to submit such information. Each participating
126 institution of higher education shall maintain, for a period of not less
127 than three years, records substantiating the reported number of eligible
128 students and documentation utilized by the institution of higher
129 education in determining qualification of the student grant recipients.
130 Such records shall be subject to audit or review. [For the academic year
131 commencing July 1, 2024, the Office of Higher Education shall (1) not
132 require participating institutions of higher education to reduce the
133 amount of a need-based grant awarded to an eligible student based on
134 the initial qualifications determined from such student's Free
135 Application for Federal Student Aid, even if the United States
136 Department of Education subsequently revises such qualifications, and
137 (2) deem a participating institution of higher education to be in
138 compliance with this section if such initial qualifications qualified an
139 eligible student for the need-based grant that such student was

140 awarded.] Funds not obligated by an institution of higher education
141 shall be returned by [May] April first in the fiscal year the grant was
142 [made] to be awarded to an eligible student to the Office of Higher
143 Education for reallocation for the next fiscal year. Financial aid provided
144 to eligible students under this program shall be designated as a grant
145 from the Roberta B. Willis Scholarship program.

146 (f) The Roberta B. Willis Scholarship Charter Oak grant shall be
147 available to any eligible student enrolled in Charter Oak State College.
148 The Office of Higher Education shall allocate any funds to Charter Oak
149 State College to be used to provide grants for eligible educational costs
150 to eligible students who demonstrate substantial financial need and
151 who are matriculated in a degree program at Charter Oak State College.
152 Individual awards shall not exceed a student's calculated eligible
153 educational costs. Financial aid provided to eligible students under this
154 program shall be designated as a grant from the Roberta B. Willis
155 Scholarship program.

156 (g) In administering the Roberta B. Willis Scholarship program, the
157 Office of Higher Education shall develop and utilize fiscal procedures
158 designed to ensure accountability of the public funds expended. Such
159 procedures shall include provisions for compliance reviews that shall be
160 conducted by the Office of Higher Education on any institution of
161 higher education that participates in the program. Commencing with
162 the fiscal year ending June 30, 2015, and biennially thereafter, each such
163 institution of higher education shall submit the results of an audit done
164 by an independent certified public accountant for each year of
165 participation in the program. Any institution of higher education
166 determined by the Office of Higher Education not to be in substantial
167 compliance with the provisions of the Roberta B. Willis Scholarship
168 program shall be ineligible to receive funds under the program for the
169 fiscal year following the fiscal year in which the institution of higher
170 education was determined not to be in substantial compliance. Funding
171 shall be restored when the Office of Higher Education determines that
172 the institution of higher education has returned to substantial

173 compliance."

This act shall take effect as follows and shall amend the following sections:		
Section 1	<i>July 1, 2025</i>	10a-173