

## H. FINANCIAL AID

Please refer to the following financial aid definitions when completing Section H.

**Awarded aid:** The dollar amounts offered to financial aid applicants.

**Financial aid applicant:** Any applicant who submits any one of the institutionally required financial aid applications/forms, such as the FAFSA.

**Indebtedness:** Aggregate dollar amount borrowed through any loan program (federal, state, subsidized, unsubsidized, private, etc.; excluding parent loans) while the student was enrolled at an institution. Student loans co-signed by a parent are assumed to be the responsibility of the student and should be included.

Institutional scholarships and grants: Endowed scholarships, annual gifts and tuition funded grants for which the institution determines the recipient.

**Financial need:** As determined by your institution using the federal methodology and/or your institution's own standards.

**Need-based aid:** College-funded or college-administered award from institutional, state, federal, or other sources for which a student must have financial need to qualify. This includes both institutional and non-institutional student aid (grants, jobs, and loans).

**Need-based scholarship or grant aid:** Scholarships and grants from institutional, state, federal, or other sources for which a student must have financial need to qualify.

**Need-based self-help aid:** Loans and jobs from institutional, state, federal, or other sources for which a student must demonstrate financial need to qualify.

**Non-need-based scholarship or grant aid:** Scholarships and grants, gifts, or merit-based aid from institutional, state, federal, or other sources (including unrestricted funds or gifts and endowment income) awarded solely on the basis of academic achievement, merit, or any other non-need-based reason. When reporting questions H1 and H2, non-need-based aid that is used to meet need should be counted as need-based aid.

## **H1. Aid Awarded to Enrolled Undergraduates**

**Do NOT include any aid related to the CARES Act or unique to the COVID-19 pandemic.**

Indicate the academic year for which data are reported for **items H1, H2, H2A, and H6** below:

Which needs-analysis methodology does your institution use in awarding institutional aid? (*formerly CDS - H3*)

<b>H1. Aid Awarded to Enrolled Undergraduates</b>		<b>Need-Based</b> (Include non-need based aid use to meet need).	<b>Non-Need-Based</b> (Exclude non-need-based aid use to meet need).
<b>Scholarships / Grants</b>	<b>Federal</b>		
	<b>State</b> - all states, not only the state in which your institution is located		
	<b>Institutional</b> - Endowed scholarships, annual gifts and tuition funded grants, awarded by the college, excluding athletic aid and tuition waivers (which are reported below)		
	<b>Scholarships/grants from external sources</b> (e.g. Kiwanis, National Merit) not awarded by the college		
	<b>Total Scholarships/Grants</b>	<b>\$0.00</b>	<b>\$0.00</b>
	<b>Student loans from all sources</b> (excluding parent loans)		
	<b>Federal Work-Study</b>		

**State and other (e.g., institutional) work-study/employment** (Note: excludes Federal Work/Study captured above)

	<b>Total Self-Help</b>	<b>\$0.00</b>	<b>\$0.00</b>
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**Parent Loans**

**Tuition Waivers**

**Athletic Awards**

## H2. Number of Enrolled Students Awarded Aid

Full-Time, First-Time, First-Year	Full-Time Undergrad. (Include Freshman)	Less Than Full-Time Undergrad.
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**A.** Number of degree-seeking undergraduate students (CDS Item B1 if reporting on Fall 2023 cohort)

**B.** Number of students in line **(A)** who applied for need-based financial aid

**C.** Number of students in line **(B)** who were determined to have financial need

<p><b>D.</b> Number of students in line <b>(C)</b> who were awarded any financial aid</p>			
<p><b>E.</b> Number of students in line <b>(D)</b> who were awarded any need-based scholarship or grant aid</p>			
<p><b>F.</b> Number of students in line <b>(D)</b> who were awarded any need-based self-help aid</p>			
<p><b>G.</b> Number of students in line <b>(D)</b> who were awarded any non-need-based scholarship or grant aid</p>			
<p><b>H.</b> Number of students in line <b>(D)</b> who need was fully met (exclude PLUS loans, unsubsidized loans, and private alternative loans)</p>			
<p><b>I.</b> On average, the percentage of need that was met of students who were awarded any need-based aid. Exclude any aid that was awarded in excess of need as well as any resources that were awarded to replace EFC (PLUS loans, unsubsidized loans, and private alternative loans).</p>			
<p><b>J.</b> The average financial aid package of those in line <b>(D)</b>. Exclude any resources that were awarded to replace EFC (PLUS loans, unsubsidized loans, and private alternative loans).</p>			
<p><b>K.</b> Average need-based scholarship or grant award of those in line <b>(E)</b></p>			

**L.** Average need-based self-help award (excluding PLUS loans, unsubsidized loans, and private alternative loans) of those in line **(F)**

**M.** Average need-based loan (excluding PLUS loans, unsubsidized loans, and private alternative loans) of those in line **(F)** who were awarded a need-based loan

## **H2A. Number of Enrolled Students Awarded Non-Need-Based Scholarships and Grants**

List the number of degree-seeking full-time and less-than-full-time undergraduates who had no financial need and who were awarded institutional non-need-based scholarship or grant aid.

**N.** Number of students in line **(A)** who had no financial need and who were awarded institutional non-need-based scholarship or grant aid (exclude those who were awarded athletic awards and tuition benefits)

**O.** Average dollar amount of institutional non-need-based scholarship and grant aid awarded to students in line **(N)**

Full-Time, First-Time, First-Year	Full-Time Undergrad. (Include Freshman)	Less Than Full-Time Undergrad.
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**P.** Number of students in line **(A)** who were awarded an institutional non-need-based athletic scholarship or grant

**Q.** Average dollar amount of institutional non-need-based athletic scholarships and grants awarded to students in line **(P)**

**The graduates and loan types to include and exclude in order to fill out CDS H4 and CDS H5 are listed below:**

**INCLUDE:**

**EXCLUDE:**

**H4. 2023 Undergraduate Class**

### H5. Number/Percent Borrowers and Average Borrowed Amount

Provide the number and percent of students in class (defined in H4 above) borrowing from federal, non-federal, and any loan sources, and the average (or mean) amount borrowed in the table below.

The "average per-undergraduate-borrower cumulative principal borrowed" is designed to provide better information about student borrowing from federal and nonfederal (institutional, state, commercial) sources.

The numbers, percentages, and averages for each row should be based only on the loan source specific for the particular row. For example, the federal loans average (Row B) should only be the cumulative average of federal loans and the private loans average (Row E) should only be the cumulative average of private loans.

Source/Type of Loan	Number in the class (defined in H4 above) who borrowed from the types of loans specific in the first column	Percent of the class (defined above) who borrowed from the types of loans specified in the first column (nearest 1%)	Average per-undergraduate-borrower cumulative principal borrowed from the types of loans specific in the first column (nearest \$1)
<b>A.</b> Any loan program: Federal Perkins, Federal Stafford Subsidized and Unsubsidized, institutional, state, private loans that your institution is aware of, etc. Include both Federal Direct Student Loans and Federal Family Education Loans.			



<p><b>B.</b> Federal loan programs: Federal Perkins, Federal Stafford Subsidized and Unsubsidized. Include both Federal Direct Student Loans and Federal Family Education Loans.</p>			
<p><b>C.</b> Institutional loan program</p>			
<p><b>D.</b> State loan programs</p>			
<p><b>E.</b> Private student loans made by a bank or lender</p>			

**H6. Aid to Undergraduate Degree-Seeking Nonresidents**

Report numbers and dollar amounts for the same academic year as checked in item H1.

*H1 Response: 0*

Indicate your institution's policy regarding institutional scholarship and grant aid for undergraduate degree-seeking nonresidents:

- Institutional need-based scholarship or grant aid is available
- Institutional non-need-based scholarship or grant aid is available
- Institutional scholarship and grant aid is not available

If institutional financial aid is available for undergraduate degree-seeking nonresidents, provide the number of undergraduate degree-seeking nonresidents who were awarded need-based or non-need-based aid:

Average dollar amount of institutional financial aid awarded to undergraduate degree-seeking nonresidents:

Total dollar amount of institutional financial aid awarded to undergraduate degree-seeking nonresidents:

### H7. Process for Nonresident First-Year Students

Select all financial aid forms that nonresident first-year financial aid applicants must submit:

- Institution's own financial aid form
- CSS Profile
- Other; please specify.

Other:

### H8. Process for First-Year Students

Select all financial aid forms domestic first-year financial aid applicants must submit:

- FAFSA
- Institution's own financial aid form
- CSS Profile
- State aid form
- Business/Farm Supplement
- Other; please enter below.

Other:

### H9. Filing Dates for First-Year Students

Does institution have a deadline for filing required financial aid forms for first-year students?  
 Select "no" if there is no deadline and applications are processed on a rolling basis.

No

Priority date for filing required financial aid forms: (MM/DD)

3/2

Deadline for filing required financial aid forms: (MM/DD)

**H10. Notification Dates for First-Year Students**

Please enter the date for only one response below based on whether students are notified on a certain date or notified on a rolling basis.

Students are notified on or about (date): (MM/DD)

Students are notified on a rolling basis starting (date): (MM/DD)

3/15

**H11. Reply Dates for First-Year Students**

Students must reply by (date): (MM/DD)  
 or within (number) of weeks of notification:

**H12. Types of Aid Available - Loans**

Please select all types of aid available to undergraduates at your institution:

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Direct Subsidized Stafford Loans   | <input type="checkbox"/> Federal Nursing Loans  |
| <input checked="" type="checkbox"/> Direct Unsubsidized Stafford Loans | <input checked="" type="checkbox"/> State Loans                                       |
| <input checked="" type="checkbox"/> Direct PLUS Loans                  | <input checked="" type="checkbox"/> College/University loans from institutional funds |
| <input type="checkbox"/> Federal Perkins Loans                         | <input checked="" type="checkbox"/> Other   |

Please specify: Alternative Loans

**H13. Types of Aid Available - Need-Based Scholarships and Grants**

Please select all types of aid available to undergraduates at your institution:

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Federal Pell             | <input checked="" type="checkbox"/> College/University scholarship or grant aid from institutional funds |
| <input checked="" type="checkbox"/> SEOG                     | <input type="checkbox"/> United Negro College Fund   |
| <input checked="" type="checkbox"/> State scholarship/grants | <input type="checkbox"/> Federal Nursing Scholarship   |
| <input checked="" type="checkbox"/> Private scholarships     | <input checked="" type="checkbox"/> Other  |
- Please specify:

**H14. Criteria Used in Awarding Institutional Aid**

Please select all criteria used in awarding non-need based institutional aid:

- |   |  |   |
|---|--|---|
| <input checked="" type="checkbox"/> Academics | <input type="checkbox"/> Job skills            | <input checked="" type="checkbox"/> Music/drama   |
| <input type="checkbox"/> Alumni affiliation   | <input type="checkbox"/> ROTC                  | <input type="checkbox"/> Religious affiliation    |
| <input checked="" type="checkbox"/> Art       | <input checked="" type="checkbox"/> Leadership | <input type="checkbox"/> State/district residency |
| <input checked="" type="checkbox"/> Athletics | <input type="checkbox"/> Minority status       |   |

**H14. Criteria Used in Awarding Institutional Aid**

Please select all criteria used in awarding need-based institutional aid:

- |   |  |  |
|---|--|--|
| <input checked="" type="checkbox"/> Academics | <input type="checkbox"/> Job skills            | <input checked="" type="checkbox"/> Music/drama              |
| <input type="checkbox"/> Alumni affiliation   | <input type="checkbox"/> ROTC                  | <input type="checkbox"/> Religious affiliation               |
| <input checked="" type="checkbox"/> Art       | <input checked="" type="checkbox"/> Leadership | <input checked="" type="checkbox"/> State/district residency |
| <input type="checkbox"/> Athletics            | <input type="checkbox"/> Minority status       |  |

**H15. Affordable Policies**

If your institution has recently implemented any major financial aid policy, program, or initiative to make your institution more affordable to incoming students such as replacing loans with grants, or waiving costs for families below a certain income level, please provide the details below:

UC's Blue and Gold Opportunity Plan is a financial aid program intended to expand access to UC for low income families. Systemwide tuition and fees are fully covered by scholarship and grant money for eligible students. The plan combines all sources of scholarship and grant awards received (federal, state, UC and private) to go toward covering tuition and fees.

**END OF SECTION H**