



UNIVERSITY  
of HAWAII\*  
SYSTEM

May 19, 2011

TO: CHANCELLORS Helen Cox Manuel Cabral  
Noreen Yamane (Interim) Leon Richards  
Douglas Dykstra Clyde Sakamoto  
Michael Rota

SUBJECT: FY 2012 Need Based Tuition Scholarships/Waivers – TFSF Reallocations

Attached is a revised worksheet that reflects the minimum Need Based Financial Aid guidelines for each campus and the reallocation plan for FY 2012. A number of changes to the process were made in FY 2011 and continue into FY 2012.

- The specific minimum need based financial aid amounts in the memorandum of February 6, 2006 distributed by Vice President Linda Johnsrud are no longer valid due to the rapidly increasing enrollment and Tuition and Fee Special Fund (TFSF) revenue at all of our campuses. We have been informed that we need to comply with the Executive Policy on Student Financial Assistance Program (E6.204) rather than the previously transmitted Johnsrud memorandum.
- Based on Executive Policy E6.204, the tuition and fee revenue base is defined as the prior year actual TFSF revenue rather than the current year TFSF revenue projection previously established in the Johnsrud memorandum.
- To maintain consistency with the Executive Policy, we are distributing the minimum need based financial aid levels based on prior actual TFSF revenue (8.8% requirement) for each campus.
- Executive Policy E6.204 also requires that the Community Colleges allocate 11 percent of the total tuition revenue charged in the prior academic year to student financial aid (both need based and non-need based). Thus, the worksheet has been amended to include total award levels for FY 2012, both need and non-need based financial aid.
- This reallocation plan once again considers only the new amounts of need based financial aid, and excludes the current continuing level of financial aid. This current continuing level of need based financial aid has been inflated each year by the resident tuition rate increase approved by the BOR. The inflation of the current continuing levels reduces the impact on the required TFSF reallocations.

Although the worksheet now includes total award levels (need based and non-need based financial aid) for FY 2011, the **TFSF reallocations will only be based on meeting the need based financial aid minimums (column J of the worksheet)**. However, it should also be noted that the total award minimum level (both need and non-need based financial aid) reflected in column M of the worksheet, which have been adjusted for the planned TFSF reallocations, are required to be met based on Executive Policy E6.204.

I will continue to work with your Vice Chancellors of Student Services to ensure that we are equitably addressing the needs of our campuses. We are also in the process of validating the final TFSF reallocation plan for FY 2011 and will be issuing a memo on final reallocations per that plan shortly. If you have any questions, please call me at 956-6280.



Michael T. Unebasami  
Associate Vice President for Administrative Affairs

Attachments

- c Vice President John Morton
- Vice Chancellors of Administrative Services
- Vice Chancellors of Student Services
- Associate VP Peter Quigley

**University of Hawaii - Community Colleges**  
**FY 2012 Need Based Financial Aid Tuition Scholarships/Waivers - Continuing and New**

5/19/2011

**Need Based Financial Aid**

	A	B	C	D	E	F	G
	FY 2010	=A % Tot	FY 2011 TFSF Rev	=C*.088	Inflated	=D-E	=E+F
	No. of Pell	% of	(UBO Projection)	Total Need	Current	New	Total Need
	Recipients	Total		Based Fin	Continuing	Fin Aid	Based Fin
				Aid (8.8% Rev)			Aid (8.8% Rev)
Honolulu CC	805	0.094506	7,172,000	631,136	350,215	280,921	631,136
Kapiolani CC	1,450	0.170228	17,854,000	1,571,152	776,005	795,147	1,571,152
Leeward CC	1,618	0.189951	11,590,000	1,019,920	478,506	541,414	1,019,920
Windward CC	983	0.115403	3,969,000	349,272	175,575	173,697	349,272
Hawaii CC	1,468	0.172341	6,463,000	568,744	124,673	444,071	568,744
Maui CC	1,778	0.208734	8,692,000	764,896	232,487	532,409	764,896
Kauai CC	416	0.048838	2,423,000	213,224	102,987	110,237	213,224
<b>Total</b>	<b>8,518</b>	<b>1.000000</b>	<b>58,163,000</b>	<b>5,118,344</b>	<b>2,240,448</b>	<b>2,877,896</b>	<b>5,118,344</b>

Source: CC IRO data (Chappell-Long)

Current continuing = FY 2006 tuition waiver level inflated by Res tuition rate increase.

**Adjusted Need Based Financial Aid Minimum**

	H	I	J	K	L	M
	=E	=F Tot*B%	=H+I	=J-G	=C*.110	=L+K
	Inflated	New Fin	Total Adjusted	Amount	Total Need & Non-	Total Need & Non-
	Current	Aid - Pell	Need Based	TFSF Rev	Need Based FA	Need Based FA
	Continuing	% Adjust	FA Minimum	Transfer	(11.0% Rev)	Minimum (Transf Adj)
12.33%	350,215	271,978	622,193	-8,943	788,920	779,977
30.70%	776,005	489,898	1,265,903	-305,249	1,963,940	1,658,691
19.93%	478,506	546,659	1,025,165	5,245	1,274,900	1,280,145
6.82%	175,575	332,118	507,693	158,421	436,590	595,011
11.11%	124,673	495,979	620,652	51,908	710,930	762,838
14.94%	232,487	600,715	833,202	68,306	956,120	1,024,426
4.17%	102,987	140,555	243,542	30,318	266,530	296,848
100.00%	<b>2,240,448</b>	<b>2,877,902</b>	<b>5,118,350</b>	<b>6</b>	<b>6,397,930</b>	<b>6,397,936</b>

Revised calculations for minimum need based financial aid required per campus based on % of FY 2010 Pell recipients - New portion only.

Requires cash transfers of TFSF between campuses.

Current continuing level remains the same per campus.  
 Current continuing = FY 2006 tuition waiver level inflated by Resident tuition rate increase.