

Treatment of Chapter 33 Post-9/11 GI Bill Benefits When Awarding Need-Based UC Grants

Context

This document summarizes the consensus approach adopted by financial aid staff at the UC Office of the President and UC campuses for awarding need-based UC grants to undergraduate students receiving Chapter 33 Post-9/11 GI Bill veterans' educational benefits.

Note that under the proposed approach, the treatment of these benefits depends in part upon whether the student is a veteran or a veteran's dependent. *In all cases, however, an undergraduate student receiving Chapter 33 benefits will receive substantially more total financial support than a similar student who does not qualify for Chapter 33 benefits.*

Underlying Principles and Implications

The consensus approach reflects several principles, each of which has implications for financial aid.

- 1. In recognition of the service provided by veterans to their country, the University is committed to maximizing veterans' ability to further their own educational objectives.**
Implication: Chapter 33 Post-9/11 GI Bill benefits should be treated favorably compared to other types of support when awarding UC grants to veterans.
- 2. A veteran's dependent receiving Chapter 33 benefits under the Transfer of Eligibility (TOE) provision of the GI Bill should be treated equitably compared to a student with a Cal Vet tuition exemption, whose parent or spouse suffered a service-connected disability or death.**
Implication: The portion of a dependent's Chapter 33 benefits designated for tuition and fees should be treated similarly to a Cal Vet tuition exemption when awarding UC grants.
- 3. A Chapter 33 veteran recipient with a Cal Grant should not be disadvantaged relative to a Chapter 33 veteran recipient without a Cal Grant.**
Implication: For packaging purposes, a Cal Grant received by a veteran should have the same impact as the Chapter 33 tuition and fee benefit that it replaces.
- 4. Undergraduate UC grants will continue to be reserved for students with financial need, consistent with the University's focus on making UC financially accessible to all.**
Implications: For veterans with Chapter 33 benefits, a student's UC grant may be reduced in those cases where the student's entire in-state level UC expense budget is already fully covered by other resources (or, for TOE recipients, other resources in addition to a standard self-help expectation). No UC grant will be awarded to cover NRST.
- 5. UC packaging policies should be consistent with the federal government's intent to provide enhanced financial assistance to veterans or their dependents under this program.**
Implications: Whereas UC typically considers all of a student's financial resources when determining the student's eligibility for UC aid, UC will not consider Chapter 33 stipends for housing or books when determining a student's eligibility for need-based UC aid.

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Practices

- Chapter 33 stipends received for housing and books will be completely ignored for both veterans and TOE recipients when determining a student's eligibility for UC financial aid. Students will receive these benefits in addition to all other forms of financial aid. As a result of these stipends, every Chapter 33 recipient – whether a veteran or a veteran's dependent – will receive substantially more total financial support than a similar student who does not qualify for Chapter 33 benefits.
- *For veterans without a Cal Grant or other tuition-specific award, waiver, or exemption*, the tuition/fee component of a student's Chapter 33 benefits will be used first to reduce or eliminate self-help, not to reduce a student's eligibility for UC grant. Only if a student's UC grant, in conjunction with a student's other awards and resources (excluding Chapter 33 housing and books stipends), would exceed the student's entire in-state level cost of attendance will UC grant be affected. In such cases, the student's UC grant will be adjusted so as not to exceed the cost of attendance. No UC grant will be used to cover NRST.
- *For veterans with a Cal Grant or other tuition-specific award, waiver, or exemption*, the student will be packaged as though the Cal Grant were a scholarship (i.e., as though it were paid from the student's Chapter 33 benefits) instead of the normal practice of treating it as a grant. As a result, it will effectively reduce or eliminate self-help before it affects a student's eligibility for UC grant. Only if a student's UC grant, in conjunction with a student's other awards and resources (excluding Chapter 33 housing and books stipends), would exceed the student's entire cost of attendance will UC grant be affected. In such cases, the student's UC grant will be adjusted so as not to exceed the cost of attendance.
- *For TOE recipients without a Cal Grant or other tuition-specific award, waiver, or exemption*, the portion of the Chapter 33 benefits designated for tuition and campus-based fees will be taken into consideration – just as a Cal Vet tuition exemption, or a Cal Grant award, is taken into consideration – when determining a student's eligibility for UC grant assuming the campus's standard self-help expectation.
- *For TOE recipients with a Cal Grant, or other tuition-specific award, waiver, or exemption*, the portion of the Chapter 33 benefits designated for campus-based fees (i.e., the fees not covered by the student's Cal Grant award) will be taken into consideration, together with the student's Cal Grant award, when determining a student's eligibility for UC grant assuming the campus's standard self-help expectation.