



THE GATES
SCHOLARSHIP®

The Gates Scholarship Welcome Packet – 2023



April 20, 2023

Dear Gates Scholar,

Once again, congratulations on being selected as a Gates Scholar! Please review this Welcome Packet carefully, as it includes important information on how to officially accept your scholarship award, The Gates Scholarship Summer Institute, and scholarship funding policies.

We highly recommend that you download and print this packet to help you keep track of required next steps.

Sincerely,

The Gates Scholarship Team

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Gates Scholar Checklist (April - June 2023)

April

- Read The Gates Scholarship Welcome Packet thoroughly.

May

- Important Deadline: Wednesday, May 3, 2023!** You must accept your scholarship!
 - As soon as possible, [log into your myTGS account](#) and accept your scholarship by submitting The Gates Scholarship Acceptance Form. In the form you will need to provide data on your college matriculation plans. The form must be submitted by no later than Wednesday, May 3, 2023, 5:00 PM PT.
- Wednesday, May 10, 2023, 3:30-5:15 PM PT
 - Attend the virtual TGSSI Orientation and Code of Conduct
- Saturday, May 20, 2023 – Sunday, May 21, 2023 (All Day)
 - Attend the virtual component of The Gates Scholarship Summer Institute

June

- Thursday, June 22, 2023 – Sunday, June 25, 2023 (All Day)
 - Attend the in-person component of The Gates Scholarship Summer Institute.
 - Location: Walt Disney World Swan & Dolphin, Lake Buena Vista, Florida

The Gates Scholarship Summer Institute FAQs

The Gates Scholarship Summer Institute (TGSSI) is a conference designed to welcome and empower the new class of Gates Scholars. It will be an opportunity for all of you to meet and connect with one another and start, or expand, your professional networks by participating in workshops and social activities aimed at preparing and inspiring you for your first year in college, and beyond.

TGSSI Dates:

- Virtual Component: Wednesday, May 10, 2023 (3:30-5:15 PM PT) & Saturday, May 20, 2023 – Sunday, May 21, 2023 (All Day)
- In-Person Component: Thursday, June 22, 2023 – Sunday, June 25, 2023 (All Day) at Walt Disney World Swan & Dolphin, Lake Buena Vista, Florida

To prepare for TGSSI, please read the information below, thoroughly, with your parent(s) and/or legal guardian. If you have any questions, please feel free to contact us via The Gates Scholarship Message Center.

Frequently Asked Questions

About The Gates Scholarship Summer Institute (TGSSI)

What is TGSSI?

TGSSI is a conference designed to welcome and empower the new class of Gates Scholars. It will be an opportunity for all of you to meet and connect with one another and start, or expand, your professional networks. You will participate in workshops and social activities aimed at preparing and inspiring you for your first year in college, and beyond, and you will have many opportunities to interact with top professionals from a range of fields.

When and where will TGSSI take place?

Gates Scholars attend both the virtual and in-person components. The virtual components will take place on Wednesday, May 10, 2023, and Saturday, May 20, 2023 – Sunday, May 21, 2023. The in-person component will take place from Thursday, June 22, 2023 – Sunday, June 25, 2023, at the Walt Disney World Swan & Dolphin, Lake Buena Vista, Florida

Scholars participate in all conference sessions.

How much does it cost to attend TGSSI?

The Gates Scholarship program will cover all TGSSI-related expenses for all Gates Scholars, including hotel, meals, and flights, if applicable.

Is it possible to leave the program early to complete a summer internship?

All Gates Scholars are expected to be present for the entire program (both the virtual and in-person components).

I am a minor. Do you need my parents' permission to attend the TGSSI?

Yes! A member of The Gates Scholarship team will reach out to your parent(s)/guardian(s), via a phone call, to formally obtain permission for you to attend. Additionally, The Gates Scholarship will also require that your parent(s)/guardian(s) sign a Waiver and Media Release Form.

I want to make sure I don't miss an important update regarding TGSSI. How will I receive updates?

Updates will be sent to all Scholars via email. Please make sure to regularly check your email, including your junk/spam folder, for emails from The Gates Scholarship team.

Additionally, in May, you will be assigned a mentor (Squad Leader) for TGSSI who will reach out to you to ensure that all your questions are answered.

Agenda

What topics will TGSSI cover?

TGSSI will cover a variety of topics and provide experiences that are designed to help prepare you and your fellow Scholars for your first year in college, and beyond. Topics will include, The Gates Scholarship resources, networking, leadership, campus resources, personal wellness, career development, how to overcome challenges you may face in your first year of college, and more.

What does the schedule look like?

Scholars will follow a structured schedule that includes workshops and various other sessions, each day of the conference. Detailed agendas will be sent to Scholars, via email, in May and June.

I will need to excuse myself for a few hours to complete a summer school assignment. Is this okay?

All Gates Scholars are expected to be present for all sessions for the duration of the program.

Additional Questions

I have additional questions about TGSSI; how/whom do I ask?

If you have additional questions, please contact us through The Gates Scholarship Message Center.

The Gates Scholarship Financial Aid Resource Guide

This guide is intended to provide you with the information you need to successfully move through The Gates Scholarship funding process, from scholarship acceptance through college graduation.

Use this guide to familiarize yourself with the upcoming funding process and refer to it, again, as needed, as you progress through each stage. We designed this guide to address your questions and concerns. However, if after you read all the information in this guide you still have questions, please send us your question(s) via the Message Center.

Please note, you will receive an updated The Gates Scholarship Funding Policy Handbook every summer, prior to the start of each academic year. **The funding policies below are effective for the 2023-2024 academic year (July 1, 2023 – June 30, 2024).**

Applying for Financial Aid

To demonstrate and maintain your eligibility as a Gates Scholar, you are required to complete and submit a FAFSA (*Free Application for Federal Student Aid*), each year of your undergraduate studies. The FAFSA filing determines a student's eligibility for federal financial aid, including grants and loans. Importantly, the financial data you enter into the FAFSA will *also* be used by your school, by The Gates Scholarship administrator (Hispanic Scholarship Fund), and by any additional scholarship and grant providers you may have, to determine the financial contributions each party ultimately makes to your total financial aid package.

Some institutions require additional financial aid applications and documents. It is your responsibility to complete the financial aid application process to the satisfaction of your institution's financial aid office. If you need help doing so, please contact The Gates Scholarship Scholar Advocacy team (scholaradvocate@thegatesscholarship.org), or the financial aid officer at your school.

Your Financial Aid Officer

Your financial aid officer is an important resource who will support you in finding ways to fund your education. It is imperative that you make contact with your financial aid officer, or equivalent financial aid staff member responsible for supporting Gates Scholars at your institution.

Your financial aid officer will be responsible for uploading your financial data into The Gates Scholarship Financial Aid Portal. The Gates Scholarship Financial Aid Portal is a tool we developed to facilitate accurate data transmission between your institution and The Gates Scholarship staff to administer your scholarship.

It is vital that your financial aid officer provide us with the most accurate and timely data possible. **You can expedite the delivery of this data by meeting with your financial aid officer as soon as you arrive on campus.** If you do that prior to the start of the fall term, your initial request for funding should already be in process and your financial aid officer can help you input any last-minute information that might be relevant to your final financial aid package.

When you meet with your financial aid officer prior to the start of fall term, you should:

- Ask if your cost of attendance accurately reflects your actual costs and whether the aid you expect to receive will cover your actual costs
- Remind your financial aid officer that The Gates Scholarship is designed to cover nearly all of your costs, *after* the expected family contribution. That means you should not be required to borrow to meet your federally—or institutionally-calculated—financial need, even though you may choose to do so

Other topics for discussion with your financial aid officer include:

- Covering transportation costs to and from home
- When you can expect any refund and how to manage these funds
- The pros and cons of borrowing for your education
- How to appeal for additional funding from The Gates Scholarship
- When and how to request funding for your upcoming academic terms
- Planning for special circumstances, like study abroad or a computer purchase

Scholar Funding Eligibility

In order to receive funding, a Gates Scholar must be enrolled full-time for the term being disbursed AND must meet Satisfactory Academic Progress requirements, as determined by his/her institution.

Funding will be available to each Scholar for a maximum of five (5) years of study, with the expectation that a Scholar will complete a bachelor's degree during that period. Should the need arise, a student may defer the scholarship award, for up to one year.

Full-Time Enrollment

Scholars must maintain full-time enrollment status during the term being disbursed, to receive TGS funding, unless he/she will earn a degree at the end of the academic term. If a Scholar falls below full-time enrollment and a full refund cannot be returned to TGS, the Scholar has utilized a term of funding. Additionally, if any term of enrollment is below full-time after disbursement, but subsequent terms are full-time, TGS funding eligibility is not compromised for the academic year.

A Gates Scholar who is approved to attend summer session with TGS funding (when summer session is not part of the academic year) may attend summer session at less than full-time.

Satisfactory Academic Progress (SAP)

SAP is a scheduled assessment of a Scholar's academic progress toward degree completion, within a maximum time frame (150%), as defined by federal policy. SAP is used to determine a

Scholar's ongoing eligibility for Title IV aid. Scholars must maintain SAP to stay in good standing for Title IV aid, as well as for TGS funding.

Scholars who are on SAP probation are still eligible for Title IV aid and therefore eligible for TGS funding. Scholars on SAP probation are strongly encouraged to seek academic support.

Scholars who are SAP suspended are not eligible for Title IV aid and therefore not eligible for TGS funding. Scholars on SAP suspension are strongly encouraged to submit a SAP appeal to their financial aid office, to regain eligibility.

Scholarship Renewal Process

Gates Scholars must complete and submit a FAFSA and TGS Renewal Form every year, prior to the start of the academic year, to continue to receive TGS funding. Pell-eligibility will only be verified prior to a Scholar's freshman year.

Fifth Year Funding

Scholars who require a fifth year of funding must complete an appeal process and provide a letter from their assigned Academic Dean (advisor) that attests to the following:

- The Scholar has exhausted all other forms of financial aid, including other scholarships and grants, before seeking approval for a fifth year of The Gates Scholarship funding
- The Scholar is enrolled in a program that requires a fifth year of study to complete the bachelor's degree requirements, as determined by the institution. Approvable situations are:
 - Degree has a standard five-year progression (e.g., certain engineering programs)
 - Certification requirements (e.g., architecture)
 - Prior year(s) medical and/or academic emergencies that require a student to take a fifth year to complete their degree
 - Student transferred from a different institution and requires a fifth year to complete their bachelor's degree
- The fifth year of study is not the result of pursuing minor(s)
- The fifth year of study is not the result of pursuing multiple majors
- The fifth year of study is not the result of desired co-terminal degrees (whether that is two bachelor's degrees or a graduate degree)

Initial Award Calculation

TGS awards are not fixed dollar amounts; rather, they are calculated each academic term using information reported by financial aid officers via The Gates Scholarship Financial Aid Portal (www.thegatesscholarship.org/sign-in).

Financial aid officers are responsible for submitting a student's cost of attendance each term. Payments are disbursed on a term-by-term basis.

The fundamental calculation used to determine a Scholar's award amount is:

- + Cost of Attendance for the term
- Expected Family Contribution (EFC)
- Gift Aid (Scholarship & Grants)

TGS Award Amount

TGS awards are to be applied to a Scholar's fall, winter, and/or spring educational expenses, as reflected on his/her student bill or account.

Any TGS funds that remain in a Scholar's school account after the Scholar's direct costs have been paid, will be refunded to the Scholar or credited to the Scholar's account, by the school in question. As is the case with all TGS scholarship funds, refunds may only be used by the Scholar for education-related expenses and must be budgeted accordingly.

Family Contribution

A Scholar's EFC is calculated based on the information provided on the FAFSA by a Scholar's parent(s) and/or the Scholar. Some schools collect additional information that may cause the expected family contribution to differ from the amount reflected on the FAFSA or Student Aid Report. This is commonly called "institutional methodology."

As a federally based program, TGS uses "federal methodology" to calculate the TGS award amount. If the Scholar's institution calculates a family contribution using their institutional methodology (IMFC) and does not allow TGS to fully or partially cover the IMFC, TGS will use IMFC in the award calculation.

Please note, if a Scholar's IMFC is less than the federally calculated EFC, TGS will calculate the student's award based on the federally calculated EFC.

Some institutions include students' federal work-study and summer income contributions as part of the IMFC. TGS funding may be used to cover a Scholar's federal work-study and summer income contributions, when allowable and appropriate.

At times, a school is required to verify FAFSA data entered by the student and his/her family. During this federal verification process, EFCs sometimes change. Scholars who are selected for federal verification at their school will be required to submit the verified EFC to TGS, for use in their initial and/or subsequent award calculations.

Zero Dollar Awards

Gates Scholars are granted an award, per term, based on the financial aid information provided online through The Gates Scholarship Financial Aid Portal. If a Scholar's Financial Aid Form demonstrates no unmet financial need or replaceable loans or work, the Scholar will be assigned an "Active" TGS status with a zero-dollar award for the academic term. The funds not utilized for that Scholar cannot be repurposed for other educational activities.

Initial Award: What is Covered

Tuition and Fees

TGS will fund the Scholar's tuition and mandatory student fees, as reflected on his/her cost of attendance, for units/credits taken as part of their bachelor's degree program. TGS does not fund graduate-level courses that are not part of an undergraduate degree. TGS does not fund graduate degrees or the graduate-level requirements of a dual degree program.

Room (housing)

TGS will fund housing or room costs that are representative of average campus housing costs for full-time residential undergraduate students. Off-campus students will be funded per the off-campus room allowance as specified by their institution's cost of attendance (COA).

Board (food, meals)

TGS will fund board (meal plans) costs that are representative of average campus meal costs for full-time residential students. Off-campus students will be funded per the off-campus board allowance as specified by their institution's COA. Exceptions can be made to accommodate dietary and/or religious requirements, when substantiated.

Books and Supplies

TGS will fund books and supplies costs that are representative of the average costs for full-time undergraduate students as specified by their institution's COA.

Transportation

TGS will fund transportation costs that are representative of the average costs for full-time undergraduate students as specified by their institution's COA. TGS will fund up to two roundtrip tickets for Scholars attending semester institutions (travel between home and campus), and up to three roundtrip tickets for Scholars attending quarter institutions.

Personal Expenses

TGS will fund personal expenses that are typical for the average full-time student, as specified by their institution's COA. Personal expenses do not include a cellphone, entertainment-related expenses, parking and moving violations, and other non-COA costs.

University Student Health Insurance

TGS will fund the actual cost of a Scholar's university student health insurance, dental, and/or vision premiums, as reflected on his/her COA. TGS will not fund copays/deductibles, prescriptions, OTC medication, contact lenses, and glasses. All other healthcare costs that the Scholar may opt into, such as laser eye surgery or dental work, will not be covered. TGS does not fund or reimburse non-university health insurance premiums.

Loan Fees

If the Scholar intends to borrow funds via student loans, we will fund costs that are representative of the average costs for undergraduate loan processing fees, as specified in their institution's COA.

Revised Awards: Overview

Gates Scholars may request up to three (one per term) revised award calculations per academic year (one for summer term if approved for funding). Financial aid officers are not limited in the number of revised award calculations they can request.

If a revised award calculation leaves a Gates Scholar with unmet need, the Scholar may be eligible for an increased TGS award. Conversely, if a revised award calculation leaves a Gates Scholar with a larger award than is warranted by need (an over-award situation), the Scholar's TGS award may be reduced. In any case, TGS will require updated information from the institution, in order to make an official determination regarding a revised TGS award amount. Revised award calculations must be submitted to TGS for approval for funding via The Gates Scholarship Financial Aid Portal.

Actionable reasons for revised awards:

- EFC decreased – creating more unmet need when family contribution is reduced
- EFC increased – creating less need when family contribution is increased
- COA increases – creating more unmet need when cost of attendance is increased
- COA decreases – creating less need when cost of attendance is decreased

The general principle behind COA revisions is to allow for a Scholar's actual costs to override the estimated costs established during the initial award calculation, if those costs are different than the initial estimate. Moreover, it is our position that undergraduate study provides unique opportunities, and that such opportunities, within an academic framework, will be supported, whenever possible.

However, TGS does not guarantee that 100% of COA revisions will be funded. Funding for academic opportunities and their related costs must meet these basic criteria:

- The cost must be Title IV-eligible, per the Scholar's financial aid office, as reflected in the Scholar's adjusted COA (with the exception of certain non-mandatory fees)
- Costs must be academically appropriate (i.e., the course, expense, or experience should be part of the Scholar's academic plan, or a vital component of a course, degree, or program in which the student is enrolled, or necessary for academic success)

The Gates Scholarship reserves the right to limit revised award amounts, based on funding availability.

Revised Awards: Calculation Process

Revised awards can be conferred anytime during the academic year or summer term, after the year's initial request for funding has been completed. These are awards that cover new or adjusted cost of attendance elements that have been added or removed by your financial aid officer, since the initial calculation was made.

Please note that your financial aid officer must approve your request for revised funding and adjust your COA before TGS can disburse the funding per your request. Your financial aid officer's submitted revision serves as an approval.

All initial and revised awards follow the same calculation formula:

- + Cost of Attendance
 - Expected Family Contribution (EFC)
 - Gift Aid (Scholarship & Grants)
-

TGS Award Amount

Special Requests Considered, on Appeal

In some limited instances, Gates Scholars may request funding for educational opportunities and supplies that are not typically included in the Cost of Attendance. Please note, funding of the following educational opportunities and supplies is not guaranteed.

Students must appeal to The Gates Scholarship, in order to request funding for any of the following:

Summer Funding

IMPORTANT: Summer funding is not guaranteed for all courses.

If you wish to apply for summer funding, you must submit your summer course registration to TGS for approval, **prior** to submitting a summer funding request to your financial aid office. If summer funding is approved by The Gates Scholarship team, TGS will inform both the student and the financial aid officer to proceed. Only courses approved by TGS will qualify for summer funding.

To qualify for summer funding, the following must be true:

1. A Scholar must be eligible for federal financial aid (i.e., the Scholar has an active FAFSA for the academic year).
2. Summer courses must be taken through a Scholar's home institution, and must match at least one of the following four scenarios:
 - Degree program will be completed with a degree conferred at the end of the summer term
 - Institution or degree program requires summer enrollment for all undergraduate students
 - The summer courses are required for the Scholar's educational program/degree, and are not offered during the regular academic year (this excludes unrestricted or free electives)
 - The summer courses, even if offered during the regular academic year, must be taken during the summer in order for a Scholar to regain Satisfactory Academic Progress (SAP)*

**To read more on TGS's definition of SAP, please reference pages 7-8.*

Summer funding requests are limited to \$10,000 per academic year, not to exceed \$10,000 over the Scholar's undergraduate career.

Intersession or Co-Op/Internship Programs

TGS will fund one intersession or co-op/internship program per Scholar per undergraduate career, if it provides academic credit. TGS defines intersessions as brief periods of coursework lasting no more than a few weeks, which occur between or within an institution's designated semester or quarter terms (e.g., an intersession might be a "January term" or "winter intersession" or "Maymester"). Intersession co-op/internship program costs should be reflected in the Scholar's COA in The Gates Scholarship Financial Aid Portal, filled out by the institution's financial aid officer.

Adjustments are limited to an additional \$3,000 per academic year, not to exceed \$3,000 over the Scholar's undergraduate career.

Study Abroad

TGS will fund one study abroad or exchange program per Scholar per undergraduate career. TGS awards may be increased ONE TIME to cover the cost of a study abroad or exchange program spanning an entire academic year (at a maximum), or for a program with a minimum duration of one fall, winter, or spring term. The program funded must be approved by the Scholar's college or university and must be taken for academic credit. Study abroad expenses must be reflected in the Scholar's COA.

Adjustments are limited to an additional \$10,000 per academic year, not to exceed \$10,000 over the Scholar's undergraduate career.

Computer

TGS will fund ONE purchase of a computer (with necessary accessories including cables, mouse, laptop bag, etc.) per Scholar per undergraduate career. Adjustments are limited to an additional \$1,000 without receipts, or \$2,000 with receipts, not to exceed \$2,000 over the Scholar's undergraduate career.

If a computer is funded by the college/university, or a different third-party scholarship/grant, The Gates Scholarship will not refund the purchase of the initial computer or fund a second computer, in the current or future years.

Child Care/Dependent Care Expenses

In the event a Scholar has custody/guardianship of a minor child or dependent adult, TGS will cover the cost of childcare, as needed, to support the Scholar in achieving academic success. Childcare is allowable for the time the Scholar is in classes or otherwise obligated by non-employment-related academic pursuits, and for times the child(ren) is not in school or cared for by the child's/children's other parent/guardian.

Adjustments are limited to an additional \$2,000 per academic year, not to exceed \$10,000 over the Scholar's undergraduate career.

Non-Mandatory Fees

Non-mandatory fees are often not covered by financial aid. In the event that non-mandatory fees (that meet the definition of “academically appropriate”) pose a financial barrier to the Scholar, TGS will review the reasons for the fees, with documentation, and upon approval, provide funding for these fees, up to pre-determined funding limits.

All non-mandatory fees must be included in the Scholar’s COA in The Gates Scholarship Financial Aid Portal. Examples of fundable non-mandatory fees include first-year orientation fees, parent orientation fees, and non-refundable housing deposits creditable toward rent (on-campus housing only).

Examples of non-mandatory fees that are not funded include parking tickets, damage fees, fines, security deposits, etc.

Disbursement

Disbursement is the process The Gates Scholarship uses to send funds to a Scholar’s institution. Once an institution is in receipt of TGS funds, it becomes the school’s responsibility to apply those funds to a Scholar’s account and to issue the Scholar a refund of any credit balance. Each institution has a different policy on how to handle credit balance refunds.

TGS highly encourages Scholars to discuss the refund process with their financial aid officer, or other university officials.

TGS does not disburse funds directly to Scholars.



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