

CRITICAL QUESTIONS REGARDING SCHOLARSHIPS AND STUDENT FINANCIAL AID
University of North Carolina at Chapel Hill
Academic Year 2004-05

Need-based student financial aid protects access for students who, without such assistance, could not afford to attend the University. Merit-based aid recognizes and rewards student talent and promise and positions the University to compete for highest-achieving students, without regard to need. Both are important sources for the recruitment and retention of undergraduate and graduate/professional students at the University.

The Office of Scholarships and Student Aid, the Office of Institutional Research, and the Faculty Committee on Scholarships, Awards and Student Aid will continue to perform research and examine the following questions throughout the 2005-06 academic year:

A. Questions Related to Campus Enrollment Planning:

1. How many more students will likely need financial aid under different enrollment growth scenarios, and in what types and amounts?
2. How will likely tuition and fee increases at the state or campus level impact the need for additional grant aid, and for whom?
3. What is the impact of the Carolina Covenant on low-income student recruitment, performance, and retention?
4. How effectively is Carolina using both need-based and merit scholarship funds (using legally permissible criteria) to recruit students of color to campus?
5. How effective is Carolina's current effort to attract the highest achieving in-state and out-of-state students through expending its merit scholarship program?
6. How do students of all income levels pay for education at Carolina? How are middle-income students faring at Carolina, given recent tuition increases?
7. What are the socioeconomic characteristics of students who study abroad? And to what extent are these opportunities available to students who depend on need-based aid to help cover college costs?

B. Recurring Questions Related to the Distribution and Allocation of Aid:

1. What is the proper balance between:
 - a. need-based and merit-based aid;
 - b. aid to graduate/professional and undergraduate students;
 - c. aid to in-state and out-of-state students?

2. What are the appropriate relative roles of the student, the family, the institution, the state government and the federal government in paying for one's education? And, to what extent should each party reasonably be expected to contribute