GUIDELINES AND PROCEDURES FOR

CHOOSE OHIO FIRST

PROGRAMS
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PURPOSE OF THE MANUAL

The purpose of this manual is to provide institutions of higher education with guidelines and procedures for the Choose Ohio First Scholarship Program. This manual describes the minimum requirements to ensure that participating campuses meet basic standards of program quality. The manual also describes the conditions requiring approval and the associated processes used to determine continued eligibility for offering Choose Ohio First funds.

CHOOSE OHIO FIRST HISTORY AND OVERVIEW

Choose Ohio First began in 2008 as a way to increase the number of Ohio students entering into and successfully completing science, technology, engineering, math or medicine (STEMM) majors at Ohio’s public and private colleges and universities. One component of the Ohio Innovation Partnership (ORC 3333.60), the Choose Ohio First Scholarship program assigns scholarships to colleges and universities to recruit undergraduate and graduate students in the fields of science, technology, engineering, mathematics, or medical education.

Choose Ohio First Scholarships are awarded to eligible students by the colleges and universities, and are reflected on the student’s tuition bill or statement. Choose Ohio First scholarships are student-centered grants from the state to the students to use to attend a university or college, and are not grants from the state to the university or college. If a college or university is unsuccessful in recruiting eligible students for all its Choose Ohio First scholarships, the institution returns the unused funds to the state for reallocation to meet scholarship needs for Choose Ohio First needs at another institution.

Campuses receiving Choose Ohio First funds must:

I. Ensure that recipients of the Choose Ohio First scholarship meet the Ohio residency requirement as outlined in OAC 3333-1-10.
   A. Forever Buckeye students (students recruited back to the state) are able to be awarded Choose Ohio First funds.
II. Ensure that each in academic year, no student receiving Choose Ohio First funds receives less than $1,500 (one thousand five hundred dollars) or more than one-half of the highest in-state undergraduate instructional and general fees charged by all state universities.

The Chancellor may authorize a state university, college, or nonpublic Ohio institution of higher education to award a Choose Ohio First scholarship in an amount greater than one-half of the highest undergraduate instructional and general fees charged by all state universities to either of the following:

A. Any undergraduate student who qualifies for a scholarship and is enrolled in a program leading to a teaching profession in science, technology, engineering, mathematics, or medicine; or

B. Any graduate student who qualifies for the scholarship and is enrolled as a graduate student in the fields of science, technology, engineering, mathematics, or medical education.

The Chancellor must also ensure that the Choose Ohio First program maintains:

1. Fiscal accountability, so that the award is used in accordance with the agreement entered into.
2. Operating progress, so that the initiative is managed to achieve the goals stated in the agreement.
3. Desired outcomes, so that the initiative contributes to the goals of enhancing regional educational and economic strengths and meets a regional economic need.
PROGRAM REQUIREMENTS

General Standards for Choose Ohio First Programs

All colleges and universities seeking to offer Choose Ohio First Scholarships must demonstrate that the following institutional and program standards are met.

Each participating institution must identify a program director or program coordinator and must provide all relevant contact information to the state. All changes to the primary program contact must be requested in writing to the state. Other individuals may be listed as departmental contacts for students as it relates to specific program requirements; however, the program director or program coordinator will be the primary contact between state leadership at the Ohio Board of Regents and the campus.

The program director or program coordinator:

A. Serves as the point of contact between the state and the campus.
B. Serves as the primary point of contact for student inquiries.
C. May be appointed by the Provost, Chief Academic Officer, or other campus official (e.g., Dean, Program Chair, etc.).
D. Serves as the administrative contact for all communications, questions, data requests and concerns.
   1. Agrees to disseminate information to other individuals on the campus as necessary. Will also collect data from other individuals as required.
E. Monitors funding levels and cost share on the campus for all majors, with input from the respective departments that are supported by COF.
F. Provides oversight for report submissions and other requirements.
G. Ensures that information from the state level is disseminated to the appropriate contacts on campus, i.e., faculty, students, staff, etc.
H. Establishes clear articulation of the degree programs receiving the Choose Ohio First funds and the degree levels eligible for the scholarship, which include:

1. Academic degrees (e.g., PhD, MA, MS, BA, BS, AS, AA)
2. Professional degrees (e.g., EdD, DBA, DPT, AuD, DNP, MSN, MBA, LLM)
3. Technical degrees (e.g., BAS, AAB, AAS, ATS)

I. Maintains program clarity by following Choose Ohio First marketing and branding standards, found here: [http://www.ohiohighered.org/node/313](http://www.ohiohighered.org/node/313).
COF POLICIES AND PROCEDURES

Funding requirements

I. Campuses that seek to award Choose Ohio First Scholarships must:
   A. Adhere to funding allocation limits that will be made available to campuses on or after July 1st of each fiscal year.
      1. If the fiscal year is also the start of a budget biennium, the campus will be notified after such a time the state budget has been approved and/or funds have been encumbered.
   B. Award Scholars in approved disciplines on the campus.
   C. Award Scholars who qualify for the scholarship as Ohio residents.
   D. Award each scholar no less than $1500 and no more than one-half of the highest in-state tuition (unless the Scholar is participating in the Woodrow Wilson Ohio Teaching Fellowship, the Ohio Primary Care Medical and Nursing Scholarship program, or other qualified exception as outlined in section 3333.66 of the Ohio Revised Code).

II. Continued funding of Choose Ohio First Scholarships will be contingent upon campus performance in three areas:
   A. Retention/COF Cohort Data
   B. Completion
   C. Campus Data Reporting
   D. Campus Commitment/Cost Share

III. Disbursement amounts will be monitored on a semester basis. Revised budgets may be sent to campuses if the annual allocation will not be spent. If funds become available as a result of a revised budget, campuses will be notified that additional funds may be available. All cost share and other requirements will still apply.
IV. All budget allocations made at the beginning of a fiscal year are estimates. Campuses may receive a revised budget based on recruitment (using Fall allocations as a baseline), performance, and availability of funds.

Matching Requirements

Match may include institutional or private funds with direct ties to the student. This means other scholarships, housing assistance, and travel to conference or research symposia, COF staff time and effort, materials and supplies for COF scholars, etc. Other sources of match may be cash or documented in-kind match related to the overall degree program or institution, and must have an explanation of how it relates to the COF program. For example, a biology-related COF program may count as match a portion of the renovation of related facilities that the students access. Also, the time and effort of other staff that support the Choose Ohio First students should be documented and counted as match (e.g., financial aid staff, advisors, mentors, etc.). Also, COF is often used to leverage federal or private foundation dollars for programming or activities. These dollars may also be used as a matching commitment.

Match is a quantifiable measure of campus commitment and may be referenced when future opportunities for funding arise.

Excess Matching Contributions

COF campuses are encouraged to document and report all sources of matching funds. This may occasionally result in match that exceeds the minimum. Campuses are encouraged to show institutional commitment to the program via matching funds. Documentation and reporting of excess matching commitment is not mandatory, but is strongly encouraged.

Timing of Cost Share Contributions

Matching commitments should be an annual commitment when possible. Match captured in a particular COF program year (July 1st to June 30th) should be reported in that year’s Annual Report. However, match may be accumulated over time if necessary (over a four-year program period). The campus should create a detailed plan for matching funds, and will be responsible maintaining documentation of match sources.
Data Collection

The primary vehicle for capturing student data and demographic information is the COFS Tracking System found here: https://chooseohiofirst.ohiohighered.org. Campuses should make students aware of data collection, as some information regarding the demographic background of the student is self-reported. The students should be made aware that the data collected will only be used in aggregate, other than the testimonials the student shares for marketing purposes.

The COFS Tracking System is used for the upload of data and reimbursement requests for Choose Ohio First campuses. A user manual can be found on the data site and is available for download. The site collects data elements critical to the monitoring of the success of Choose Ohio First, and is in compliance with various laws and statutes. This site contains both Limited and Restricted Data. Definitions are as follows:

I. Limited Access:

These are data elements for which users must obtain specific authorization to access since the data’s unauthorized disclosure, alteration, or destruction will cause perceivable damage to the individual and institution.

Examples: Date of Birth, Ethnicity

II. Restricted:

These are data elements for which the highest levels of protection should apply, both internally and externally, due to the risk or harm that may result from disclosure or inappropriate use. This includes information protected by law or regulation whose improper use or disclosure could:

1. Adversely affect the ability of the program to accomplish its mission

2. Lead to the possibility of identity theft by release of personally identifiable information of university constituents
3. Result in non-compliance with various state and federal regulations such as FERPA, HIPAA, GLBA

4. Result in non-compliance with contractual obligations for such data security standards

For further information, please review the following references:


- Ohio State University Restricted Data FAQ - [http://8help.osu.edu/4434.html](http://8help.osu.edu/4434.html)

The Annual Report is an integral part of measuring program success. The online submission form can be found here: [https://www.ohiohighered.org/chooseohio1st/annual-survey](https://www.ohiohighered.org/chooseohio1st/annual-survey). Please use this site to upload numerical data. A link to a document template for narrative data can also be found on this site.

Assessments must be used to inform continuous performance improvement of the Choose Ohio First Program. When possible, program assessment that compares Choose Ohio First student performance to non-COF students (e.g., other STEMM students, student population overall, etc.) is encouraged. Results should be communicated regularly to students and others as necessary (e.g., faculty, advisors, campus leadership, etc.).

Surveys administered to students, when possible, may be used to measure program satisfaction. Results should be communicated with state level leadership in the Annual Report.

Collection of data and impact must continue for the Choose Ohio First students following graduation to obtain information on workforce placement and whether or not the graduate has remained in the state.

Currently, data for public institutions is made available through the state Higher Education Information System (HEI). Ohio private and independent institutions must submit data as requested to continue offering Choose Ohio First Scholarships. Data requests will be similar to submissions made to the Integrated Postsecondary Education Data System (IPEDS), including STEMM enrollment, graduation rates, etc.
Special Guidelines for WW Fellowship Campuses

Per the program expectations for the Woodrow Wilson Teaching Fellowships, there are separate guidelines. The primary contact for the Woodrow Wilson Ohio Teaching Fellowships is housed at the Woodrow Wilson National Fellowship Foundation. All student submissions and budget approvals originate from the Foundation.

The ongoing monitoring and mentoring of the Woodrow Wilson Fellows is also housed with the Foundation and at the participating campuses. Campuses agreed to the mentoring and subsequent monitoring of the Fellows for three years following their graduate program. This information will be initially reported to the Woodrow Wilson National Fellowship Foundation, but will ultimately be reported to the Board of Regents.

Additional details may be found here: https://www.ohiohighered.org/woodrow

Special Guidelines for PCMH Medical and Nursing Campuses

Per the guidelines for the Primary Care nursing, the identification and monitoring of the PCMH medical and nursing students is housed at the campus. Each campus has its own admission requirements and process for identifying students eligible for the award; however, campuses may use the examples/templates provided in Appendix D. Also, each campus will be monitored by the ongoing work of the Educational Advisory Group (EAG), as to the implementation of a primary care curriculum that was approved by the EAG. The EAG has representation from every campus involved in the PCMH work and has also established a committee to review the ongoing implementation of the primary care curriculum.

Campuses should direct all questions and updates regarding the curriculum implementation, identification of students, and monitoring to OBR.
It has been outlined in the Memorandum of Understanding with each campus that the students must meet the certain criteria to be eligible for the funding, including specific areas of focus for the degree program (e.g., family practice, pediatrics, etc.).

In addition to being Ohio residents, PCMH Scholars shall (at mimimum):

- Demonstrate a pattern of community service prior to application (Medical)
- Hold a baccalaureate degree or higher in nursing (Nursing).
- Commit to practice in Ohio for no less than three years.
- Accept Medicaid patients while in practice.

The campus will monitor the academic progress of the student. The academic progress of the student will be described in the annual progress report each campus must submit and the term-based requests for payment each campus submits. The submission affirms the student enrollment and progress toward the completion.

Each year for the three year obligatory period, the graduate will submit a statement to the program director on the campus (or the designee in the financial aid or admissions office) affirming their current involvement with primary care in Ohio. This statement will include their name, address, and current contact information, as well as their practice name and contact information. The information from the student can be confirmed by workforce data through the Department of Taxation. The practice eligibility can also be confirmed through the Department of Health, and their match list for the PCMH work which includes practice name, Medicaid/Medicare population, and the Uninsured population.

Failure to remain in a primary care discipline as outlined will result in any portion of the award the student has received becoming a debt owed and payable upon demand. Campus will utilize their standard collection methods to collect payments from the graduate on a schedule that is based on the standard repayment plan for federal loan repayment. The campus and the Board of Regents will establish a mutually agreeable schedule for the return of funds to OBR (e.g., quarterly, bi-annually). The collected funds are returned to the GRF. Campuses may utilize the services of the Attorney General as a means of collecting repayment if the student drops out of school without approved deferment, student drops out of the approved degree program, or if the graduate fails to complete the total service obligation. The collected funds are returned to the GRF.
Campuses will report to OBR each term regarding student status. OBR collects SSN and will be able to confirm wage data on the students; however, the campuses will monitor students through the use of periodic employment verification and student submission of documentation that confirms they are still meeting the requirements of the funds. Each year that a student meets the workforce obligation for the Primary Care funding, a portion of their financial commitment will be deducted.

Ongoing Monitoring and Review

Choose Ohio First campuses are subject to ongoing monitoring and review of the status of COF, including desk reviews and/or site visits conducted by the Director. The Associate Vice Chancellor will also review the site visit/desk review notes, the payment requests from campuses, and the deposit reports from campuses once a semester. The campuses are also a part of the annual financial aid audit that occurs at the state level – Choose Ohio First students will be included as part of that sampling.

Campuses will also adhere to their institutional monitoring plan, as outlined in their approved proposals/applications. Basic internal monitoring will include review of majors and other requirements of funded students, verification of submission prior to uploading to the reporting system, and a continuous improvement plan. The campuses will submit correct and complete student data each semester, will be subject to a desk review or site visit at least once a year, and submit an annual report (see next page).
Reporting

An Annual Report on the status and progress of the Choose Ohio First program is due from each campus no later than June 30th of each funded program year, and for the three years of monitoring if funding ends. The Annual Report online form and narrative templates can be found here: https://www.ohiohighered.org/chooseohio1st/annual-survey.

Along with the Annual Report, site visits and desk reviews may periodically be conducted. Site visits and desk reviews should be viewed as part of the reporting process to state leadership. Please review the site visit checklist in the COF Forms and Templates section. Site visit protocols and scheduled are:

I. New campuses receive an automatic visit.

II. Campuses will receive a site visit or desk review based on the annual review schedule. If a campus receives a site visit in one year, the subsequent year’s visit will be a desk review; if a campus receives a desk review, the subsequent year’s visit will be a site visit.

III. Campuses with incomplete or inconsistent data will receive a site visit even if an in person visit was conducted the previous year; campuses may also invite state leadership for visits as desired.

Accounting Records and Recordkeeping

The Choose Ohio First institution must submit for reimbursement at the end of the semester/term that the student is enrolled. Fall payments must be requested at the end of the Fall semester. Spring payments must be requested at the end of Spring semester. Institutions must request summer payments at the conclusion of the Summer term.

Reimbursement requests received after the academic term without prior notification to the Director will be paid as funding allows and may be rejected. Reimbursement requests for past fiscal or academic years will not be accepted.
Reimbursement requests for individual students made after the larger request may be delayed. Payments to campuses are made in a lump sum and payment for several COF programs may be released in the same disbursement.

The Choose Ohio First institution must maintain records of all recipients of the award. This must include a roster of all students from all years of the program, including student information, demographic information, and graduation date. A complete roster of students is also maintained for each campus at the COF website: https://chooseohiofirst.ohiohighered.org. This website will only keep data for seven years beyond the date it is uploaded, per the retention schedule for Choose Ohio First. The campus should also maintain information including follow up data about the student’s transition to the workforce.

If the Choose Ohio First program has an exit requirement (i.e., must stay in the state after graduation, must enter a certain field, etc.) the campus must maintain this list in accordance with any long-term plans for monitoring students and update it internally accordingly.

The institution must maintain sufficient financial and cost share records for funds committed to the Choose Ohio First program.

Return of Funds

There may be instances where an overpayment occurs and the campus must return the funds to the Ohio Board of Regents. It is a hope that these funds could be applied to a student account in a subsequent term and deducted from a future requests. However if that cannot be done, the campus will notify the Director of the amount and reason for the overpayment, make any adjustment in the data system for the affected student(s), and will submit a check for deposit in the GRF account. The Director will log the repayment, making note of the campus, amount, and affected student(s) for recordkeeping at OBR. The check is submitted to Fiscal with a refund transmittal form that is signed by the Director. Excessive requests resulting in overpayment may result in a mandatory training/coaching for the affected campus.
COF PROGRAMMING AND PRACTICES

Recruitment

Selection
Choose Ohio First campuses must establish and document a clear process for awarding Choose Ohio First Scholarships (e.g., GPA requirement, first-generation focus, interview, essay, etc.). The scholarship is not necessarily need-based, nor merit-based, but the requirements for the scholarship should be clear and consistently stated. Copies of the application and other relevant print materials must be provided to state level leadership on an annual basis or as they are updated.

Students must be enrolled in the eligible major or program prior to receiving Choose Ohio First funds. This must be confirmed by COF program staff.

Campuses must refer to all selected students as “Scholars” in applicable materials and documentation. This also provides the student with awareness that they are, in fact, Choose Ohio First recipients.

Retention
The campus is responsible for creating and implementing best practices that increase student retention from year to year. The retention rate is an important measure of assessing the value of the COF program and for anticipating a completion rate for Choose Ohio First scholars.

For tracking and assessment purposes, a campus may find it helpful to utilize a cohort-based approach.

Completion
The Choose Ohio First campus will establish a process for monitoring students up to and after completion, including job placement and whether or not the Scholar remains in Ohio. Graduate school placement will also be monitored including whether or not the graduate work is in a STEM field.
The Choose Ohio First program provides awareness and access to academic services meant to positively impact student performance. These services may be created exclusively for COF students or may be an opportunity made available on campus. Any service provided should align with the goals of the Choose Ohio First program, and serve as a means of increasing completion. The institution may provide or have access to student academic support services including but not limited to the following:

I. Student advising related to the successful completion of college-level courses and their degree program.

II. Academic support for students with disabilities and other learning needs.

III. Physical or mental health counseling and/or external referrals.

IV. Environmental support on-site or through external referrals if applicable to the demographic makeup of COF student population (e.g., for transportation, child care, personal finance).

V. Career counseling, including co-op and internship information.

VI. Tutoring and academic enrichment services, particularly for the difficult STEMM subjects.

Recommended Services

Professional accreditation and access to professional organizations for COF students is encouraged when available for the program area offering Choose Ohio First scholarships.

Seamless Transfer from 2-year to 4-year - Choose Ohio First institutions are encouraged to collaborate with other institutions to effectively and efficiently use resources. Choose Ohio First programs should, when possible, make the students aware of transfer opportunities to other Ohio colleges and universities to continue their education. These connections should be highlighted in the annual report when possible.
Business/Industry Partnerships

Connections to Co-ops and Internships
Choose Ohio First Institutions must clearly demonstrate that sufficient market research has been completed to demonstrate the need for the proposed program and that student interest in the program has been fully assessed. All institutions are required to provide evidence of the need for the proposed program in Ohio. Generic statements that imply the “need” for the program are not sufficient; programs offering Choose Ohio First Scholarships must include data-driven reasons including the competitive advantage of the institution, the potential for employment upon graduation, and appropriate multi-year financial analyses that address the projected workforce gap the program will fill.

Evidence may include but is not limited to:

I. Local, state and national labor market research

II. Letters of support from businesses, schools and other organizations that commit to multi-year partnerships for education and training

III. The commitment may include financial support, “guaranteed” enrollments, co-ops, or internships, and other relevant proof of interest

IV. Local, state and national demographic information demonstrating trends linked to education

V. Partnerships with other colleges and universities to leverage the strengths of each and serve multiple locations in the state

VI. Longitudinal data demonstrating the need for a higher-level degree (e.g., a proven associate’s leading to a bachelor’s degree)

VII. Reengineering of an existing program to meet changing market needs based on workforce shifts
GUIDELINES AND PROCEDURES FOR CHOOSE OHIO FIRST PROGRAMS

CHOOSE OHIO FIRST SITE DIRECTOR CONTACT LIST

https://www.chooseohiofirst.org/participating-programs
APPENDICES
Appendix A: Helpful Definitions

**Associate of Applied Business and Associate of Applied Science degrees** are awarded in recognition of successful completion of career technical education programs and prepare student for immediate employment upon graduation. The curricula for applied associate’s degree programs are described in terms of technical and non-technical studies. Non-technical studies include general education and courses that serve as a base for the technical field (sometimes referred to as “applied general education” or “basic” coursework). Non-technical studies must make up approximately 50% of the curriculum.

**Associate of Arts and Associate of Science degrees** are designed for students wishing to complete the first two years of a bachelor’s degree, as well as those desiring two years of a liberal arts education.

**Associate of Individualized Study degrees** are awarded for the satisfactory completion of an individually planned program designed to serve an educational objective that could not be served through another degree program of the awarding institution. The program, planned by the student and faculty advisor must contain an area of concentration consisting of a minimum of 20 semester credit hours (30 quarter credit hours), which is formed according to one of the following models: a) an interdisciplinary, but coherent combination of courses drawn from a minimum of two and a maximum of four instructional areas; b) up to forty semester credit hours (60 quarter credit hours) awarded by the institution for documentable educational experiences or courses completed at other institutions of higher education or educational enterprises judged by the institution to be of college level; or c) an unusual by academically coherent combination of technical and general studies courses.

**Associate of Technical Study degrees** are awarded for successful completion of an individually planned program of study designed to respond to the need for specialized technical education not currently available in the formal degree programs available on a particular campus. The program must have an area of concentration which is equivalent to at least 30 semester credit hours (45 quarter credit hours) in technical studies and a clearly identifiable career objective. The area of concentration can either be formed by: Type A—a coherent combination of technical courses selectively drawn from two or more technical programs currently offered by the college to serve a career objective that would not be
adequately addressed by one of the existing programs alone; or Type B—courses completed
or training received by a student at other institutions of higher education, career centers, or
other educational enterprises judged by the institution to be of college level and for which
the institution awards degree credit, to a maximum of 30 semester credit hours (or 45
quarter credit hours).

**Associate Degree:** An award that requires completion of at least 60 semester credit hours
or 90 quarter credit hours.

**Bachelor’s Degree:** An award that requires completion of at least 120 semester credit
hours (or 180 quarter credit hours). Bachelor’s degrees may be awarded for general areas
of study, such as those recognized by the Bachelor of Arts and the Bachelor of Science
degrees or in specialized professional and technical fields such as these recognized by the
Bachelor of Fine Arts, the Bachelor of Science in Nursing, the Bachelor of Education, and so
on. Although bachelor’s degrees require completion of a specified number of credit hours,
the length of the program can vary. For instance, bachelor’s degrees may be conferred for a
five-year cooperative (work-study plan) program, which provides for alternate class
attendance and employment in business, industry or government. They may also be
conferred in instances where the full complement of credits is obtained in three years.

**Certificate:** A formal award certifying the satisfactory completion of an organized program
of study at the postsecondary level.

**Community college:** term used to collectively identify any of the three types of two-year
institutions defined in Ohio Revised Code (ORC)—community college (ORC 3354.), state
community college (ORC 3358.), and technical college (ORC 3357.).

**Degree:** A recognition or award for completion of a prescribed course of study in an
institution of higher education designated by the customary titles of associate, bachelor,
master, specialist or doctor.

**Doctoral Degree:** The highest award a student can earn for graduate study. Doctoral
degrees require the successful completion of at least 90 semester credit hours (or 135
quarter credit hours) of work beyond the bachelor’s degree. The Doctor of Philosophy
(PhD) is typically considered a research degree and involves preparation for the conduct of
independent research and the discovery of new knowledge. Doctoral degrees may also recognize preparation for professional practice. Examples of professional practice doctoral degrees include the Doctor of Nursing Practice (DNP), Doctor of Education (Ed.D.) and Doctor of Physical Therapy (DPT).

**Major:** That portion of a degree that is made up of at least 30 semester hours of specialized study leading to both breadth and depth in a particular discipline. The term major may be used interchangeably with the term degree program.

**Master’s Degree:** An award that requires the successful completion at least 30 semester credit hours (or 45 quarter credit hours) of work beyond the bachelor’s degree. Master’s degrees such as the Master of Arts and the Master of Science are typically considered research graduate degrees, and involve preparation to carry out research and to discover new knowledge—whether the field is pure or applied. Master’s degrees may also recognize preparation for professional practice. Examples of professional practice master’s degrees include the Master of Business Administration (MBA), Master of Science in Nursing (MSN), Master of Public Health (MPH) and the Master of Social Work (MSW).

**Minor:** A program of study that is made up of at least 18 semester hours in a particular discipline.

**One Year Technical Certificate:** Certificates awarded by community colleges for the completion of a minimum of 30 and a maximum of 37 semester credit hours (45 to 55 quarter credit hours) of coursework, with the majority of the coursework completed in a prescribed technical area. These certificates must be applicable to an associate degree, either at the student’s “home” campus, at another community college within commuting distance, or through a distance education partnership with another campus.

**Online Course:** A course where most (>80%) of the content is delivered online; typically the course will have no face-to-face meetings.

**Online Degree:** A degree in where most (>80%) of the degree can be completed online.

**Post-Baccalaureate Certificate:** An award that requires completion of an organized program of study beyond the bachelor’s degree (typically at least 18 semester credit hours...
or 24 quarter credit hours); designed for individuals who have completed a bachelor’s
degree but do not meet the requirements for a master’s degree.

**Post-Master’s Certificate:** An award that requires completion of an organized program of
study beyond the master’s degree (typically at least 24 semester credit hours or 36 quarter
credit hours) designed for individuals who have completed a master’s degree but do not
meet the requirements for a doctoral degree.

**Regional campus:** a campus that is geographically apart from and independent of the main
or home campus of the institution. It must have all or most of the following attributes: it is
permanent in nature; it offers at least one, but typically multiple degree programs; it has its
own faculty and administrative structure, often including its own budgetary and hiring
authority; and it houses academic resources, support services and operational services for
the campus.

**Undergraduate Certificate:** An award that requires completion of an organized program of
study at the postsecondary level (below the baccalaureate degree) that does not meet the
requirements for a bachelor’s degree. These certificates are classified by IPEDs as either “at
least 1 but less than 2 academic years” or “at least two but less than 4 academic years”.
Appendix B: Links to Related Documents and Sites

**Ohio Revised Code**

Chapter 3333  
Ohio Board of Regents  [http://codes.ohio.gov/orc/3333](http://codes.ohio.gov/orc/3333)

Chapter 3333.60  
Ohio innovation partnership definitions  [http://codes.ohio.gov/orc/3333.60](http://codes.ohio.gov/orc/3333.60)

Chapter 3333.611  
Primary care medical student component of the choose Ohio first scholarship program  [http://codes.ohio.gov/orc/3333.611](http://codes.ohio.gov/orc/3333.611)

Chapter 3333.612  
Primary care nursing student component of the choose Ohio first scholarship program  [http://codes.ohio.gov/orc/3333.612](http://codes.ohio.gov/orc/3333.612)

Chapter 3333.62  
Competitive process for program awards  [http://codes.ohio.gov/orc/3333.62](http://codes.ohio.gov/orc/3333.62)

Chapter 3333.69  
Monitor of initiatives for which award granted  [http://codes.ohio.gov/orc/3333.69](http://codes.ohio.gov/orc/3333.69)

**Ohio Administrative Code**

3333-1-10  
Ohio student residency for state subsidy and tuition  [http://codes.ohio.gov/oac/3333-1-10](http://codes.ohio.gov/oac/3333-1-10)

3333-1-61.2  
Objectives to be reflected  [http://codes.ohio.gov/oac/3333-1-61.2](http://codes.ohio.gov/oac/3333-1-61.2)

**Other Documents and Sites**

Choose Ohio First programs and webpage –  [www.chooseohiofirst.org](http://www.chooseohiofirst.org)


Site Visit/Desk Review Schedule & documents - [https://www.ohiohighered.org/node/313](https://www.ohiohighered.org/node/313)

Choose Ohio First Data upload site - [https://chooseohiofirst.ohiohighered.org](https://chooseohiofirst.ohiohighered.org)

Appendix C: Common Questions for Surveys of Choose Ohio First Students

Using a Likert scale, with:
1=Strongly Agree, 2=Agree, 3=No Opinion/Neutral, 4=Disagree, 5=Strongly Disagree

- I have had valuable interactions with mentors/faculty.
- I have had access to advising, meetings, and activities that have been helpful.
- I have had valuable interaction with potential employers through co-ops and internships.
- I plan to choose a career in a STEM field.
- I plan to stay in Ohio to work in a STEM field.
- Choose Ohio First is a big part of the reason I chose my major.
- Choose Ohio First helped me to choose my current institution.
- Choose Ohio First has increased my interest in my chosen STEM discipline.
- Choose Ohio First is a big part of the reason I am able to remain in school.
- I have had opportunities that my classmates who are not Choose Ohio First students did not get.
Appendix D: Document Examples/Templates for PCMH Awards

Promissory Note

PROMISSORY NOTE

XXXX University – Primary Care Award funded by the CHOOSE OHIO FIRST Program (COFP)

The Primary Care monetary award is considered by XXXX a “forgivable loan.” The award loan is forgiven once the conditions of the Program Description have been satisfied as stated in the Forgivable Loan Agreement. Borrower is encouraged to consult legal counsel prior to signing this Promissory Note.

This Promissory Note is made and entered into as of the __ day of __, 20__, by and between the XXXX University Primary Care program (“XXXX-PCMH”), located in xxxxx, Ohio and ________________________________, a Primary Care Scholar, (“Borrower”).

FOR VALUE RECEIVED, the Primary Care Scholar (Borrower) promises to pay to the XXXX-PCMH the principal amount of THIRTY THOUSAND DOLLARS ($30,000), (the “Amount Awarded” for one year in the program), together with interest, in accordance with the terms set forth below and the attached Program Description.

1. This Note shall become due and payable upon termination of the forgivable loan option pursuant to Section 4 of the attached Forgivable Loan Agreement and interest will begin to accrue on the outstanding principal at the rate of 5.00% per year.

2. Repayment shall be made in periodic installments over a period not to exceed ten (10) years. The Repayment Period shall begin on the first day of the month following the six (6) month anniversary of (i) the Borrower’s withdrawal from XXXX-PCMH or (ii) notice from the Borrower that he or she does not intend to satisfy the requirements for forgiveness set forth in Section 2 of the Forgivable Loan Agreement, or (iii) notice from XXXX-PCMH that Borrower has failed to comply with the requirements as Section 2. The Repayment Period shall continue until the Award has been paid in full (“Repayment Date”).

3. Borrower may, at his or her option, prepay all or part of the principal and accrued interest at any time without penalty. Any prepayment will not affect the necessity to make periodic installments required above unless the prepayment results in the prepayment of the entire principal amount of the loan and any accrued interest and related costs. The Borrower further agrees that any funds prepaid are not refundable in the event the Borrower later satisfies the requirements set forth in Section 2 of the Forgivable Loan Agreement.

4. At the Borrower’s written request and at the option and sole discretion of XXXX-PCMH, periodic installments of principal and interest need not be paid while the Borrower is experiencing an economic hardship (“Forbearance”). A period of Forbearance shall not exceed six (6) months, and Borrower shall not be granted more than four (4) periods of Forbearance. Periods of Forbearance may be granted consecutively. During each period of Forbearance, interest shall accrue and, at the end of the period of Forbearance or, if more than one consecutive period of Forbearance has been granted, at the end of the consecutive periods of Forbearance, all unpaid interest shall be capitalized (added to the Amount Financed), with interest thereafter accruing on the new Amount Financed.
5. The Borrower acknowledges and consents that this Note is an official document and evidence of the Borrower’s financial responsibility if the Borrower’s account is not paid by the Repayment Date. Borrower also acknowledges that he or she is responsible for repayment of this Note, regardless of whether or not Borrower graduates from XXXX-PCMH.

6. In the event of default, XXXX University may declare the entire unpaid balance of principal and interest evidenced by this Loan immediately due and payable. A default shall also preclude the Borrower from participating further in the COFSP. The following events shall constitute a default under this Note:

   a. Failure to comply with the Requirements for Loan Forgiveness set forth in Section 2 of the Program Description document;
   
   b. Failure to begin qualifying service or cash repayment within the time specified in this Note;
   
   c. Failure to remit a payment to XXXX-PCMH when due;
   
   d. Failure to comply with any term or condition of this Note;
   
   e. Failure to notify XXXX-PCMH of a change in the Borrower’s name, address, school enrollment status or employment status;
   
   f. Failure to provide verification of employment by the date designated by XXXX-PCMH;
   
   g. Any false representation or statement made or furnished to XXXX-PCMH by the Borrower in connection with this Loan.

The failure or delay on the part of the University, or its successor, to exercise its option under this paragraph shall not constitute a waiver of the right to exercise such option in the event of a continuing or future default.

Upon default, XXXX-PCMH will notify the Borrower of such default and its exercise of the option to declare the entire unpaid balance due and payable in accordance with this Note. Written notice of default shall be effective if sent by certified mail, return receipt requested, and addressed to the Borrower at the last address on file with XXXX-PCMH. Refusal or non-delivery at that address shall be deemed delivery after seven days. Upon default, XXXX-PCMH, or its authorized agents, may disclose to credit bureaus organizations that the Borrower has defaulted, along with other relevant information.

7. XXXX-PCMH reserves the right to turn this Note over to the Attorney General of the State of Ohio for collection, if the Note is not paid in accordance with its terms. Ohio law also permits personal income tax returns to be offset by any debt owed to a state institution. In addition to such amount, Borrower agrees to pay all costs incurred by XXXX-PCMH pertaining to collection efforts including, but not limited to: (i) court costs; (ii) reasonable attorney fees; (iii) collection costs and agency fees, whether or not litigated, in the amount of one third (1/3) of the balance of the account.
8. This Note shall be governed and interpreted by the laws of the State of Ohio, without regard to conflicts of law, and shall be binding on the heirs, executors, administrators, or assignees of the Borrower and of XXXX-PCMH. If any section of this Note shall be determined to be invalid, only that section will be invalidated, and the remainder shall be considered to be valid and enforceable.

9. This Note is considered a student loan made for an educational benefit to the Borrower by a non-profit or governmental unit.

10. Borrower further understands that if Borrower defaults on any payment, the institution may disclose that Borrower has defaulted, along with other relevant information, to credit bureau organizations.

BORROWER UNDERSTANDS THAT UPON DEFAULT OF ANY, OR ALL OF THE TERMS AND CONDITIONS OF THIS PROMISSORY NOTE AND UPON SUBMISSION OF A NOTICE OF DEFAULT BY XXXX-PCMH, TO BORROWER, AT HIS OR HER LAST KNOWN ADDRESS, THE FULL AMOUNT DUE INCLUDING, BUT NOT LIMITED TO, CHARGES, FEES, INTEREST PENALTIES, AND COSTS WILL IMMEDIATELY BECOME DUE AND PAYABLE, AT THE OPTION OF OU-HC0M. FURTHER, BORROWER SHALL BE LIABLE FOR ATTORNEY FEES AND/OR ACTUAL OR REASONABLE COLLECTION COSTS, WHICH MAY BE ADDED TO THE TOTAL AMOUNT DUE.

WITNESS this date, the due execution hereof with the intent to be legally bound hereby.

By

________________________

Borrower

________________________

Print Name

________________________

Home Phone

________________________

Cell Phone

________________________

Address

________________________

City, State, Zip Code
Forgivable Loan Agreement

XXXX University Primary Care Medical Home Program
(XXXX-PCMH)

Fellowships funded by the Choose Ohio First Program

FORGIVABLE LOAN AGREEMENT

PROGRAM DESCRIPTION

A. The Choose Ohio First Scholarship Program, ("COFSP"), was developed through the Ohio Innovation Partnership to increase the number of STEMM graduates (as defined by the Board of Regents), in accordance with Section 108(F)(4) of the Internal Revenue Code.

B. The COFSP provides a $30,000 award for a PCMH student for up to four years of medical school. Awards are granted in the form of Forgivable Loans. Students who complete the PCMH program and serve no less than three years practicing primary care in Ohio have their loan principal forgiven. In effect, this is a pay for service arrangement that may have deferred income tax consequences for the student. It is wise to consult your tax advisor for advice specific to your financial matters.

C. Recipients of forgivable loans will be selected by the COFSP via the host university upon recommendation of the Educational Advisory Group Selection Committee. The forgivable loan is in the amount of $30,000 for up to four years of medical school. Two equal disbursements will be made during each year the student is eligible for the program, one per semester, after confirmation of registration: summer/fall, fall/spring, or spring/summer depending on the medical school’s calendar.

D. The loan is forgivable upon completion of the requirements set forth in Section 2 of the Promissory Note agreement, which accompanies this document.

E. To be eligible for an award the student must:
   i. remain an Ohio resident.
   ii. demonstrate a pattern of community service prior to application and while in medical school.
   iii. achieve and maintain good standing in all phases of the PCMH program.
   iv. commit to practice in Ohio for no less than 3 years, following residency.
   v. accept Medicaid patients while in practice.
AGREEMENT

1. FORGIVABLE LOANS. The XXXX-PCMH will provide a COFSP loan of $30,000 to the Recipient, subject to the terms and conditions set forth in this Agreement and in the accompanying Promissory Note. Prior to receipt of these funds, the Recipient shall execute the Promissory Note.

2. REQUIREMENTS FOR LOAN FORGIVENESS. The loan will be forgiven if the Recipient satisfies both of the following requirements:
   a. The Recipient must complete residency in family practice, family practice/psych, internal medicine, pediatrics, or med-peds in Ohio.
   b. The Recipient must commit to practice in Ohio for no less than a period of three years, and accept Medicaid patients while in practice.

3. DEFERMENT FOR EXUENATING CIRCUMSTANCES. Based on information provided by the Recipient, XXXX-PCMH may, in its sole discretion, determine that a deferment of the service obligation in Section 2 is warranted. Deferment may be granted for unanticipated events such as illness or accident that make the Recipient temporarily incapable of performing the service obligation.

4. TERMINATION OF LOAN FORGIVENESS OPTION. Except as otherwise provided in this Agreement, the loan forgiveness option shall be terminated if:
   a. The Recipient withdraws from the XXXX-PCMH program;
   b. The Recipient fails to meet the standards set by the COFSP via the PCMH program;
   c. The Recipient fails to achieve and maintain good academic and professional standing in the XXXX-PCMH program, or otherwise fails to meet expectations of the program;
   d. The Recipient delivers notice to the XXXX-PCMH that he or she does not intend to satisfy the requirements for forgiveness set forth in Section 2, above; or
   e. XXXX-PCMH determines that the Recipient has failed to comply with the requirements in Section 2.

Upon termination of the loan forgiveness option, the principal of the loan shall become due and payable in accordance with the terms of the attached Promissory Note and interest will begin to accrue on the outstanding principal at the rate of 5.00% per year.

5. USE OF LOAN FUNDS. The Recipient hereby acknowledges and agrees that the proceeds of this loan shall be used solely for the expenses of attending XXXX-PCMH for the purpose of obtaining a medical degree in a primary care field.

6. DEATH OR DISABILITY. If XXXX-PCMH determines that it is impossible for the Recipient to satisfy the requirements in Section 2 of the Promissory Note because of the
Recipient’s death or permanent disability, the University shall forgive the outstanding balance of the loan.

7. **BANKRUPTCY.** The undersigned Recipient hereby acknowledges and agrees that this is an educational loan made under a program, which is funded by a governmental unit, and as such, is not dischargeable in bankruptcy except as may be permitted under 11 U.S.C. § 523(a)(8).

8. **RECIPIENT'S RESPONSIBILITIES.** The undersigned Recipient hereby acknowledges and agrees that, as long as said Recipient is participating in the COFSP, the Recipient shall:

   a. Maintain current name, address, e-mail and telephone information on file with XXXX-PCMH;

   b. Provide verification of employment annually to XXXX-PCMH as required, and

   c. Participate in XXXX-PCMH program evaluations consisting of a variety of protocols such as interviews, surveys, questionnaires and professional meetings during the campus program.

9. **GENERAL PROVISIONS.** The undersigned Recipient hereby acknowledges receipt of a copy of this Agreement. This Agreement is governed by the laws of the State of Ohio.

Recipient

________________________  ______________________
Signature                        Date

________________________
Name (Print)

________________________
Street Address

________________________
City, State, Zip Code

**XXXX University College of Medicine**

**XXXX-PCMH**

________________________  ______________________
Date                        Date