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March 1, 2018

COMMITTEE SUBSTITUTE
FOR

SENATE BILL NO. 97

By: Bergstrom of the Senate

and

Rogers of the House

[Oklahoma Higher Learning Access Program -
eligibility requirements - children of certain
teachers - student agreements - financial need -
~~effective date -~~

~~emergency~~]

BE IT ENACTED BY THE PEOPLE OF THE STATE OF OKLAHOMA:

SECTION 1. AMENDATORY 70 O.S. 2011, Section 2603, as last amended by Section 2, Chapter 289, O.S.L. 2017 (70 O.S. Supp. 2017, Section 2603), is amended to read as follows:

Section 2603. A. Except as otherwise provided for in subsection B of this section and elsewhere in this section, to be eligible to participate in the Oklahoma Higher Learning Access Program and to qualify for an award which includes payment of an amount equivalent to resident tuition or other tuition pursuant to Section 2604 of this title for the first semester or other academic unit of postsecondary enrollment, a student shall:

1 1. Be a resident of this state or be enrolled in a school
2 district located in this state that serves students who reside in
3 both this state and an adjacent state pursuant to a contract as
4 authorized in Section 5-117.1 of this title;

5 2. Be a United States citizen or lawfully present in the United
6 States. A student who is not a United States citizen or lawfully
7 present in the United States shall not be eligible to participate in
8 the Oklahoma Higher Learning Access Program and to qualify for an
9 award notwithstanding the provisions of Section 3242 of this title.
10 The provisions of this paragraph shall not apply to any student who
11 was enrolled in the Oklahoma Higher Learning Access Program prior to
12 the end of the 2006-2007 school year;

13 3. Have a record of satisfactory compliance with agreements
14 executed pursuant to Section 2605 of this title;

15 4. a. have graduated within the previous three (3) years
16 from a high school accredited by the State Board of
17 Education, or the Oklahoma School of Science and
18 Mathematics with a minimum 2.5 cumulative grade point
19 average on a 4.0 scale for all work attempted in
20 grades nine through twelve,

21 b. have graduated within the previous three (3) years
22 from a high school not accredited by the State Board
23 of Education with a minimum 2.5 cumulative grade point
24 average on a 4.0 scale for all work attempted in

1 grades nine through twelve and have achieved a
2 composite score of 22 or higher on the ACT test, or
3 c. have satisfactorily completed within the previous
4 three (3) years an educational program that was
5 provided through a means other than a public or
6 private school and have achieved a composite score of
7 22 or higher on the ACT test;

8 5. Have completed the curricular requirements for admission to
9 an institution within The Oklahoma State System of Higher Education
10 and one additional unit or set of competencies in a course that
11 meets college admission requirements. The curriculum requirements
12 shall include two units or sets of competencies in foreign or non-
13 English language or technology courses that meet the college
14 admission requirements and one unit or set of competencies of a fine
15 arts course. Students shall also have attained a 2.5 grade point
16 average in the core curriculum courses. Students who attended a
17 high school which did not offer all the core curriculum courses or
18 students who were educated by other means and were not offered all
19 the core curriculum courses shall be allowed to satisfy this
20 curriculum requirement by participating in a program approved by the
21 State Regents for remediation of high school curricular
22 deficiencies;

23 6. Have satisfied admission standards as determined by the
24 Oklahoma State Regents for Higher Education for first-time-entering

1 students for the appropriate type of institution, or, if attending a
2 private institution, have satisfied admission standards as
3 determined by the private institution. No student participating in
4 the Oklahoma Higher Learning Access Program shall be admitted into
5 an institution of higher education by special admission standards;

6 7. Have secured admission to, and enrolled in, an institution
7 which is a member of The Oklahoma State System of Higher Education,
8 a postsecondary vocational-technical program offered by a technology
9 center school that meets the requirements to be eligible for federal
10 student financial aid, or a private institution of higher learning
11 located within this state and accredited pursuant to Section 4103 of
12 this title; and

13 8. a. have established financial need according to the
14 provisions of subsection D of Section 2605 of this
15 title and standards and provisions promulgated by the
16 Oklahoma State Regents for Higher Education,

17 b. if the student was adopted between birth and twelve
18 (12) years of age while in the permanent custody of
19 the Department of Human Services, in the court-ordered
20 custody of a licensed private nonprofit child-placing
21 agency, or federally recognized Indian tribe, as
22 defined by the federal Indian Child Welfare Act, have
23 established financial need according to the provisions
24 of paragraph 1 of subsection E of Section 2605 of this

1 title and standards and provisions promulgated by the
2 Oklahoma State Regents for Higher Education, ~~or~~

3 c. if the student was adopted between thirteen (13) and
4 seventeen (17) years of age while in the permanent
5 custody of the Department of Human Services, in the
6 court-ordered custody of a licensed private nonprofit
7 child-placing agency, or federally recognized Indian
8 tribe, as defined by the federal Indian Child Welfare
9 Act, have established financial need according to the
10 provisions of paragraph 2 of subsection E of Section
11 2605 of this title and standards and provisions
12 promulgated by the Oklahoma State Regents for Higher
13 Education, or

14 d. if the student is the child of a certified classroom
15 teacher, as provided for in paragraph 4 of subsection
16 E of Section 2605 of this title. For the purposes of
17 this paragraph, "certified classroom teacher" means
18 any certified, full-time teacher who has been employed
19 by a public school district in this state for a
20 minimum of five (5) years.

21 B. 1. A student shall be eligible to participate in the
22 Oklahoma Higher Learning Access Program and to qualify for an award
23 which includes payment of an amount equivalent to resident tuition
24 or other tuition pursuant to Section 2604 of this title for the

1 first semester or other academic unit of postsecondary enrollment if
2 the student meets all of the following criteria:

3 a. is a child of any person killed after January 1, 2000,
4 in the line of duty in any branch of the United States
5 Armed Forces or who died after January 1, 2000, as a
6 result of an injury sustained while in the line of
7 duty in any branch of the United States Armed Forces
8 and the person who was killed or died filed an
9 individual or joint Oklahoma income tax return for the
10 tax year prior to the year during which the person was
11 killed or died,

12 b. is a resident of this state or is enrolled in a school
13 district located in this state that serves students
14 who reside in both this state and an adjacent state
15 pursuant to a contract as authorized in Section 5-
16 117.1 of this title,

17 c. enrolls in an institution within The Oklahoma State
18 System of Higher Education prior to reaching the age
19 of twenty-one (21),

20 d. has satisfied admission standards as determined by the
21 Oklahoma State Regents for Higher Education for first-
22 time-entering students for the appropriate type of
23 institution, or, if attending a private institution,
24 has satisfied admission standards as determined by the

1 private institution. No student participating in the
2 Oklahoma Higher Learning Access Program shall be
3 admitted into an institution of higher education by
4 special admission standards,

5 e. has secured admission to, and enrolled in, an
6 institution which is a member of The Oklahoma State
7 System of Higher Education, a postsecondary
8 vocational-technical program offered by a technology
9 center school that meets the requirements to be
10 eligible for federal student financial aid, or a
11 private institution of higher learning located within
12 this state and accredited pursuant to Section 4103 of
13 this title, and

14 f. executes an agreement pursuant to subsection C of
15 Section 2605 of this title.

16 2. A student who is eligible to participate in the program
17 pursuant to this subsection shall not be required to meet the
18 eligibility requirements set forth in subsection A of this section.

19 C. To retain eligibility while pursuing the program of higher
20 learning in which enrolled, the student shall:

21 1. Meet the requirements for retention and degree completion as
22 established by the institution in which the student is enrolled;

1 2. Maintain good academic standing and satisfactory academic
2 progress according to standards of the Oklahoma State Regents for
3 Higher Education;

4 3. Maintain satisfactory academic progress as required for
5 eligibility for federal Title IV student financial aid programs.
6 The provisions of this paragraph shall become effective for the
7 2012-2013 school year;

8 4. Comply with the standards related to maintenance of
9 eligibility as promulgated by the Oklahoma State Regents for Higher
10 Education; and

11 5. Refrain from conduct that leads to expulsion or suspension
12 of more than one semester from an institution of higher education.
13 A student who violates the provisions of this paragraph shall
14 permanently lose eligibility for program benefits. The provisions
15 of this paragraph shall become effective January 1, 2008.

16 D. The Oklahoma State Regents for Higher Education and the
17 State Board of Career and Technology Education shall promulgate
18 rules relating to maintenance of eligibility under the Oklahoma
19 Higher Learning Access Act by a student.

20 E. It is the intent of the Legislature that students in the
21 ninth grade for the 1992-93 school year who are determined to be
22 eligible Oklahoma Higher Learning Access students pursuant to the
23 Oklahoma Higher Learning Access Act shall be the first students
24

1 eligible for benefits from the Oklahoma Higher Learning Access Trust
2 Fund.

3 F. The Oklahoma State Regents for Higher Education are
4 authorized to study, develop and propose criteria for determining
5 award eligibility based upon the completion of seven semesters of
6 high school coursework by a student.

7 SECTION 2. AMENDATORY 70 O.S. 2011, Section 2605, as
8 last amended by Section 4, Chapter 289, O.S.L. 2017 (70 O.S. Supp.
9 2017, Section 2605), is amended to read as follows:

10 Section 2605. A. Each school year, every fifth- through ninth-
11 grade student in the public and private schools of this state and
12 students who are educated by other means and are in the equivalent
13 of the fifth through ninth grade shall be apprised, together with
14 the parent, custodial parent, or guardian of the student, of the
15 opportunity for access to higher learning under the Oklahoma Higher
16 Learning Access Program. The Oklahoma State Regents for Higher
17 Education and the State Board of Education shall develop, promote,
18 and coordinate a public awareness program to be utilized in making
19 students and parents aware of the Oklahoma Higher Learning Access
20 Program.

21 B. On a form provided by the Oklahoma State Regents for Higher
22 Education, every public school district shall designate at least one
23 Oklahoma Higher Learning Access Program contact person, who shall be
24 a counselor or teacher, at each public school site in this state in

1 which eighth-, ninth- or tenth-grade classes are taught. When
2 requested by the State Regents, the State Board of Education shall
3 assist the State Regents to ensure the designation of contact
4 persons. Private schools shall also designate at least one school
5 official as a contact person. For students who are educated by
6 other means, a parent or guardian or other person approved by the
7 State Regents shall be designated the contact person.

8 C. 1. Students who qualify on the basis of financial need
9 according to subsection D or E of this section or who meet the
10 eligibility qualification set forth in subparagraph a of paragraph 1
11 of subsection B of Section 2603 of this title prior to entering the
12 tenth grade or prior to reaching the age of fifteen (15) and the
13 standards and provisions promulgated by the Oklahoma State Regents
14 for Higher Education shall be given the opportunity throughout the
15 eighth-, ninth-, and tenth-grade years, for students enrolled in a
16 public or private school, or between the ages of thirteen (13) and
17 fifteen (15), for students who are educated by other means, to enter
18 into participation in the program by agreeing to, throughout the
19 remainder of their school years or educational program:

- 20 a. attend school or an educational program regularly and
- 21 do homework regularly,
- 22 b. refrain from substance abuse,
- 23 c. refrain from commission of crimes or delinquent acts,
- 24

- d. have school work and school records reviewed by mentors designated pursuant to the program,
- e. provide information requested by the Oklahoma State Regents for Higher Education or the State Board of Education, and
- f. participate in program activities.

2. Students who meet the eligibility qualification set forth in subparagraph a of paragraph 1 of subsection B of Section 2603 of this title after completing the tenth grade or after reaching the age of sixteen (16) shall be given the opportunity prior to reaching the age of twenty-one (21) to enter into participation in the program and shall execute an agreement with provisions as determined by the Oklahoma State Regents for Higher Education.

3. The contact person shall maintain the agreements, which shall be executed on forms provided by the Oklahoma State Regents for Higher Education and managed according to regulations promulgated by the Oklahoma State Regents for Higher Education, and the contact person shall monitor compliance of the student with the terms of the agreement. The Oklahoma State Regents for Higher Education are authorized to process student agreements and verify compliance with the agreements. Students failing to comply with the terms of the agreement shall not be eligible for the awards provided in Section 2604 of this title.

1 D. Except as otherwise provided for in subsection E of this
2 section and except for students who qualify pursuant to subsection B
3 of Section 2603 of this title, a student shall not be found to be in
4 financial need for purposes of the Oklahoma Higher Learning Access
5 Program if:

6 1. At the time the student applies for participation in the
7 program during the eighth, ninth or tenth grade for students
8 enrolled in a public or private school, or between the ages of
9 thirteen (13) and fifteen (15), for students who are educated by
10 other means, the income from taxable and nontaxable sources of the
11 student's parent(s) exceeds Fifty Thousand Dollars (\$50,000.00) per
12 year;

13 2. Beginning with eighth-, ninth- or tenth-grade students who
14 are enrolled in a public or private school or students between the
15 ages of thirteen (13) and fifteen (15) who are educated by other
16 means who apply for participation in the program in the 2017-2018
17 school year, the federal adjusted gross income of the student's
18 parent(s) exceeds Fifty-five Thousand Dollars (\$55,000.00) per year;

19 3. Beginning with eighth-, ninth- or tenth-grade students who
20 are enrolled in a public or private school or students between the
21 ages of thirteen (13) and fifteen (15) who are educated by other
22 means who apply for participation in the program in the 2021-2022
23 school year, the federal adjusted gross income of the student's
24 parent(s) exceeds Sixty Thousand Dollars (\$60,000.00) per year;

1 4. At the time the student begins postsecondary education and
2 prior to receiving any Oklahoma Higher Learning Access Program
3 benefit award, the federal adjusted gross income of the student's
4 parent(s) exceeds One Hundred Thousand Dollars (\$100,000.00) per
5 year; and

6 5. Beginning with the 2018-2019 academic year, prior to
7 receiving any Oklahoma Higher Learning Access Program benefit award
8 for any year during which the student is enrolled in an institution
9 which is a member of The Oklahoma State System of Higher Education,
10 a postsecondary vocational-technical program offered by a technology
11 center school that meets the requirements to be eligible for federal
12 student financial aid or a private institution of higher learning
13 located within this state and accredited pursuant to Section 4103 of
14 this title, the federal adjusted gross income of the student's
15 parent(s) exceeds One Hundred Thousand Dollars (\$100,000.00) per
16 year.

17 The determination of financial qualification as set forth in
18 paragraphs 4 and 5 of this subsection shall be based on the income
19 of the student, not the income of the parent(s), if a student:

- 20 a. is determined to be independent of the student's
21 parents for federal financial aid purposes,
- 22 b. was in the permanent custody of the Department of
23 Human Services at the time the student enrolled in the
24 program, or

1 c. was in the court-ordered custody of a federally
2 recognized Indian tribe, as defined by the federal
3 Indian Child Welfare Act, at the time the student
4 enrolled in the program.

5 The provisions of this paragraph shall apply to any student who
6 has received an Oklahoma Higher Learning Access Program benefit
7 award after the 2017-2018 school year;

8 6. The Oklahoma State Regents for Higher Education shall review
9 the determination of financial qualification as set forth in
10 paragraphs 1, 2 and 3 of this subsection if the income from taxable
11 and nontaxable sources of the student's parent(s) includes income
12 received from nontaxable military benefits or income received from
13 the federal Social Security Administration due to the death or
14 disability of the student's parent(s). If the income from taxable
15 and nontaxable sources of the student's parent(s), excluding income
16 received from nontaxable military benefits or income received from
17 the federal Social Security Administration due to the death or
18 disability of the student's parent(s), does not exceed the
19 limitations set forth by paragraphs 1, 2 and 3 of this subsection,
20 the student shall be determined to have met the financial
21 qualification set forth in paragraphs 1, 2 and 3 of this subsection.

22 E. 1. A student who was adopted between birth and twelve (12)
23 years of age while in the permanent custody of the Department of
24 Human Services, in the court-ordered custody of a licensed private

1 nonprofit child-placing agency, or federally recognized Indian
2 tribe, as defined by the federal Indian Child Welfare Act, shall not
3 be found to be in financial need for purposes of the Oklahoma Higher
4 Learning Access Program if at the time the student begins
5 postsecondary education and prior to receiving any Oklahoma Higher
6 Learning Access Program benefit award, the federal adjusted gross
7 income of the student's parent(s) exceeds One Hundred Fifty Thousand
8 Dollars (\$150,000.00) per year. The provisions of this paragraph
9 shall not apply to any student who has received an Oklahoma Higher
10 Learning Access Program benefit award prior to the 2012-2013 school
11 year.

12 2. A student who was adopted between thirteen (13) and
13 seventeen (17) years of age while in the permanent custody of the
14 Department of Human Services, in the court-ordered custody of a
15 licensed private nonprofit child-placing agency, or federally
16 recognized Indian tribe, as defined by the federal Indian Child
17 Welfare Act, shall not be found to be in financial need for purposes
18 of the Oklahoma Higher Learning Access Program if at the time the
19 student begins postsecondary education and prior to receiving any
20 Oklahoma Higher Learning Access Program benefit award, the federal
21 adjusted gross income of the student's parent(s) exceeds Two Hundred
22 Thousand Dollars (\$200,000.00) per year. The provisions of this
23 paragraph shall not apply to any student who has received an
24

1 Oklahoma Higher Learning Access Program benefit award prior to the
2 2012-2013 school year.

3 3. Except for students who qualify pursuant to subsection B of
4 Section 2603 of this title, the determination of financial
5 qualification as set forth in this subsection shall be based on the
6 income of the student, not the income of the parent(s), if the
7 student is determined to be independent of the student's parent(s)
8 for federal financial aid purposes. A determination of financial
9 qualification shall not be required for the student who meets the
10 criteria set forth in this subsection at the time the student
11 applies for participation in the program. The provisions of this
12 paragraph shall not apply to any student who has received an
13 Oklahoma Higher Learning Access Program benefit award prior to the
14 2008-2009 school year.

15 4. a. A student who is the child of a certified classroom
16 teacher shall not be found to be in financial need for
17 purposes of the Oklahoma Higher Learning Access
18 Program if at the time the student applies for
19 participation in the Oklahoma Higher Learning Access
20 Program, at the time the student begins postsecondary
21 education and prior to receiving any Oklahoma Higher
22 Learning Access Program benefit award the federal
23 adjusted gross income of the student's parent(s)
24 exceeds One Hundred Fifty Thousand Dollars

1 (\$150,000.00) per year. The State Regents for Higher
2 Education shall verify the employment status of the
3 student's parent(s) prior to the student receiving any
4 Oklahoma Higher Learning Access Program benefit award.
5 The provisions of this paragraph shall apply to
6 eighth-, ninth- or tenth-grade students who are
7 enrolled in a public or private school or students
8 between the ages of thirteen (13) and fifteen (15) who
9 are educated by other means who apply for
10 participation in the program after the 2017-2018
11 school year.

12 b. For the purposes of this paragraph, "certified
13 classroom teacher" means any certified, full-time
14 teacher who has been employed by a public school
15 district in this state for a minimum of five (5)
16 years. The teacher shall not be required to have been
17 employed by the same public school district for five
18 (5) years.

19 F. The financial qualification of a student as set forth in
20 subsections D and E of this section shall be certified by the
21 contact person or by the Oklahoma State Regents for Higher Education
22 on the agreement form provided by the Oklahoma State Regents for
23 Higher Education. The form shall be retained in the permanent
24

1 record of the student and a copy forwarded to the Oklahoma State
2 Regents for Higher Education.

3 G. Agreements shall be witnessed by the parent, custodial
4 parent, or guardian of the student, who shall further agree to:

5 1. Assist the student in achieving compliance with the
6 agreements;

7 2. Confer, when requested to do so, with the school contact
8 person, other school personnel, and program mentors;

9 3. Provide information requested by the Oklahoma State Regents
10 for Higher Education or the State Board of Education; and

11 4. Assist the student in completing forms and reports required
12 for program participation, making applications to institutions and
13 schools of higher learning, and filing applications for student
14 grants and scholarships.

15 H. Students who are enrolled in a school district located in
16 this state that serves students who reside in both this state and an
17 adjacent state pursuant to a contract as authorized in Section 5-
18 117.1 of this title, are in the eleventh and twelfth grades during
19 the 2006-2007 school year, and who were denied participation in the
20 program shall be allowed to enter or reenter into participation in
21 the program by entering into agreements as set forth in subsections
22 C and D of this section by June 1, 2008.

1 I. The Oklahoma State Regents for Higher Education shall
2 promulgate rules for the determination of student compliance with
3 agreements made pursuant to this section.

4 J. The Oklahoma State Regents for Higher Education shall
5 designate personnel to coordinate tracking of program records for
6 the years when students participating in the program are still in
7 the schools or are being educated by other means, provide staff
8 development for contact persons in the schools, and provide liaison
9 with the State Board of Education and local organizations and
10 individuals participating in the program.

11 K. The school district where an Oklahoma Higher Learning Access
12 Program student is enrolled when the student begins participation in
13 the program and any subsequent school district where the student
14 enrolls shall forward information regarding participation by the
15 student in the program to a school to which the student transfers
16 upon the request of the school for the records of the student.

17 L. Students participating in the Oklahoma Higher Learning
18 Access Program shall provide their Social Security number or their
19 student identification number used by their school to the Oklahoma
20 State Regents for Higher Education. The Regents shall keep the
21 numbers confidential and use them only for administrative purposes.

22 ~~SECTION 3. This act shall become effective July 1, 2018.~~

23 ~~SECTION 4. It being immediately necessary for the preservation~~
24 ~~of the public peace, health or safety, an emergency is hereby~~

1 ~~declared to exist, by reason whereof this act shall take effect and~~
2 ~~be in full force from and after its passage and approval.~~

3 COMMITTEE REPORT BY: COMMITTEE ON APPROPRIATIONS
4 March 1, 2018 - DO PASS AS AMENDED
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