Student Handbook

Program Policies and Procedures

Academic Year 2018-19
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INTRODUCTION

Kauffman Scholars, Inc. ("KSI") is a multi-year, college access, persistence and completion program that supports the academic, social and emotional development of low-income students, increasing their chances for postsecondary success. Postsecondary success is defined as attainment of a four-year college degree (bachelor), two-year college degree (associate), a technical certification or the completion of another approved postsecondary pathway (e.g. armed forces). The centerpiece of the program is a supportive network of KSI coaches and resources. Students who persist through high school graduation are eligible for a last dollar scholarship for up to five (5) years of postsecondary education.

KSI is governed by policies that seek to promote responsibility, engender respect and ensure that all KSI students take advantage of the resources to earn and maintain the scholarship, to make an appropriate choice of postsecondary education and to succeed. The expectations, rules and procedures set forth in this KSI Student Handbook of Program Policies and Procedures ("Handbook") are designed to give students a better understanding of what it means to be a Kauffman Scholar, and to provide information on the purposes, goals and administration of the KSI program.

KSI reflects Ewing Marion Kauffman’s strong belief in opportunity through education. Mr. Kauffman also believed that opportunity comes with responsibility. Consistent with the spirit of Mr. Kauffman, KSI seeks to develop in students a true sense of ownership and responsibility for their actions and the consequences of those actions. Responsibility depends in part on an atmosphere of mutual courtesy and respect among KSI, students and staff. Students are expected to observe the regulations of KSI and to exhibit respect for themselves and others in their words and actions.

Mission
To help low-income students in Kansas City, Kansas, and Kansas City, Missouri, become college and career ready, increasing their chances for postsecondary success.

Vision
To nurture a community of economically independent individuals who are engaged citizens, contributing to the improvement of Kansas City, Kansas, and Kansas City, Missouri.

Notice of Nondiscrimination
KSI does not discriminate on the basis of race, color, national origin, age, religion, creed, sex, sexual orientation, veteran’s status, disability, or any other legally recognized classification in admissions or access to its programs and activities. Specific complaints of discrimination should be referred to KSI Executive Leadership (Executive Director, Program Director, Director of Operations, and/or the KSI Board of Directors). Making a good faith, reasoned complaint of discrimination will not cause any negative reflection on the complainant from KSI, nor will it affect his/her access to programs, activities, services, privileges, advantages or accommodations provided by KSI.
Notice of Anti-Harassment

Harassment or bullying of any person is strictly prohibited. It is the intent of KSI to maintain an environment that is free from harassment of any nature, whether by fellow students, staff, contractors, volunteers, or otherwise and the dignity of every person is respected and appreciated.

Harassment can take many forms. Generally, it involves conduct, comment or display that is insulting, intimidating, humiliating, hurtful, demeaning, belittling, malicious, degrading or otherwise offensive by causing discomfort, personal humiliation or embarrassment to a person or group of persons, interfering with their ability to participate in or take advantage of the KSI program.

Sexual harassment includes unwanted sexual advances, requests for sexual favors, and/or other verbal or physical behavior or conduct of a sexual nature that occurs under certain conditions and submission to or rejection of this conduct unreasonably interferes with an individual’s participation in the KSI program activities or creates an intimidating, hostile or offensive environment.

Specific complaints of harassment should be referred to KSI Executive Leadership. KSI will strive to promptly investigate all complaints of harassment and will take appropriate disciplinary and/or corrective action based on the investigative findings and existing statutes and regulations. Making a good faith, reasoned complaint of harassment will not cause any negative reflection on the complainant from KSI, nor will it affect his/her access to programs, activities, services, privileges, advantages or accommodations provided by KSI.

PROGRAM ELIGIBILITY

To remain eligible for participation in the program, students must comply with all programmatic and scholarship provisions as set forth in this Handbook. High School graduates who have transitioned to college will not be required to maintain permanent residence within the Kansas City Kansas Public Schools (KS) or Kansas City Public Schools (MO) district boundaries in order to remain in the program. However, regardless of a student’s official residence, as referenced above, the expectation is that every student will meet all postsecondary program and scholarship requirements.

STUDENT CODE OF CONDUCT

KSI maintains the expectation that all students will be active and engaged participants in the program and, in so doing, will develop a life-long appreciation for learning and achievement. This requires a climate of consideration and mutual respect. All aspects of a student’s conduct – his/her speech, behavior, social media presence, attire – should reflect respect for himself/herself and for the rights of others.
Basic Expectations
Whether at school, at KSI programming, or in the community, every student in the program is expected to constantly work towards honing and developing respect for self and others. With that in mind, KSI will not tolerate non-compliance in the following areas:

Respect for Self

- Presenting a continual negative appearance or an apathetic attitude toward academic and/or program requirements in-person, or via social media outlets;
- Use of and/or sharing drugs, alcoholic beverages, or other restricted substances at school, KSI programming or other community events;
- Being arrested, convicted or entering guilty pleas or the equivalent.

Respect for Others

- Treatment of KSI staff, collegiate/university staff, students or others with disrespect, as evidenced by insubordination, lying or discriminatory comments or actions based on race, gender, sexual orientation income, etc.;
- Violating the rights of KSI staff, teachers, students, or others (e.g., assault, battery, fighting, theft, fraud, etc.);
- Vandalizing or defacing public or private property;
- Endangering themselves and others by bringing a weapon to school, KSI activities or other community events;
- Disruptive conduct at school or KSI programming;
- Association with gang-related activity.

KSI reserves the right to consider conduct beyond what is listed above to determine any student’s continued program participation.

Alcohol, Drug, and Tobacco Policy
Any student who knowingly possesses, uses, transmits, or is under the influence of alcohol (if underage) or illegal drugs at any time, is subject to immediate dismissal from KSI. The use of alcohol by a minor, the distribution of alcohol to a minor by an adult and the use of any controlled substance are all against the law and are considered serious misconduct. KSI reserves the right to randomly test participants for drug and alcohol usage. Violators of this policy will be referred to KSI Executive Leadership for continued program participation or dismissal.

KSI reserves the right to call emergency medical personnel to transport intoxicated or drug-impaired individuals to the nearest hospital emergency room. Any costs associated with such emergency response are the responsibility of the student.
Usage of Technology

Students may use computers, email and other hardware/software as a way to maximize engagement and enhance the KSI experience. KSI believes in the appropriate use of the internet, email, local area networks, stand-alone personal computers, software and other web-based applications for informational resources, programmatic engagement and opportunities for learning. All KSI email, network, hardware, software or other web resources/applications will be used only for KSI-related communication and activities.

Each student shall be held accountable for his/her actions and activity within the scope of technology use regarding KSI. Unacceptable uses of email, network, hardware, software or other web-based resources/applications will result in the suspension or revocation of these privileges. Examples of unacceptable use are as follows:

- Using KSI technology for an illegal activity, including the violation of copyright or other contracts;
- Using KSI technology for financial or commercial gain;
- Degrading or disrupting equipment or system performance;
- Vandalizing the data of another;
- Gaining unauthorized access to resources or entities;
- Invading the privacy of individuals;
- Using the account owned by another;
- Posting personal communications without the author’s consent;
- Virtual or online bullying/harassment;
- Posting anonymous messages;
- Accessing the Internet to view or otherwise use pornographic materials;
- Posting messages that violate the KSI Student Code of Conduct.

KSI reserves the right to consider conduct beyond what is listed above to determine any student's continued program participation.

COACHING

KSI coaching is designed to provide services to meet the unique needs of each member of the KSI community. The student’s connection with his/her coach is the most critical relationship that the student will have in KSI. The coach is an advisor, mentor, advocate and confidante who is focused on the student’s interests and success.

Coaching Engagement Expectations

Coaches offer a variety of student services: personal/social advice, study skills assistance, academic advising, registration information, career-counseling and referral services. Formal counseling (i.e., psychological therapy) is not a service provided by KSI coaches.
Meeting With Your Coach

Coaches proactively meet with students on a case-by-case basis. Special emphasis is placed on students whose academic performance or other factors impeding postsecondary completion. It is the responsibility of the student to make an appointment with his/her coach when circumstances arise that require assistance.

KSI Engagement Portal & Gmail

The primary form of communication between student and coach will be through the engagement portal. It is the responsibility of the student to check messages and notifications on the engagement portal frequently throughout the week and respond to all messages with proper etiquette. Please keep in mind that Gmail may still be used to access surveys, calendar appointments and other Google applications.

Confidentiality Policy

KSI understands that it may have access to and be aware of an array of highly sensitive personal, medical, and/or academic information about each student. This information may come to KSI directly from students, parents, legal guardians, teachers, college/university staff, family members or others. KSI does not intend to use such information for any purpose other than the academic and social enrichment of the student in furtherance of the objectives of the KSI program. KSI expects that it may share confidential information only with KSI staff on a need-to-know basis whenever appropriate to complete the program objectives or if legally required to do so.

KSI will attempt to use reasonable efforts to not disclose or otherwise share confidential information, except with the specific prior written authorization of the student as required by law. KSI will keep all documents containing such information in a secure location.
PROGRAM PARTICIPATION EXPECTATIONS

KSI coaches, family members, teachers, mentors, and friends may guide and direct the development process, but real achievement in the pursuit of excellence is not possible if a student takes a passive role in the process. KSI aims to empower students to own their academic and personal development, setting students up for postsecondary success.

Program Evaluation Categories

Participation in the KSI program is a privilege, not a right. Continued participation in the KSI program for every student is determined by academic, behavior, and program performance. Below are the major checkpoints used to evaluate a student’s standing in the KSI program.

Behavior

- Institutional suspension or expulsion; this includes all campus-wide violations (including residence halls/facilities);
- Code of Conduct violations: this can include institutional conduct along with KSI program-related violations;
- Adherence to the KSI Drug/Alcohol/Tobacco Policy;
- Criminal activity.

Academics

- Annual (not cumulative) Grade Point Average (GPA);
- Failing grades (F, I, NG);
- Credit hours passed.

Program Engagement

- Unexcused absences for KSI programming;
- Unexcused absences for Individual Success Plan (ISP) Coach meetings;
- Regular submission of official transcripts.

Good Standing, Watch, Probation, & Dismissal

KSI will review individual collegiate student program status (ACTIVE, DISMISSED or WITHDRAWN) and program standing (GOOD STANDING, WATCH or PROBATION) on an annual basis after the conclusion of each academic year. Please keep in mind that although status/standing is evaluated annually, failure to provide an official transcript at the end of each academic term (semester) may lead to program dismissal.

KSI Coaches work with students to nurture their academic and social development. KSI coaches will assist each student in addressing these situations as they arise, guiding the student to identify strategies to avoid future mistakes and/or poor decisions.
KSI GOOD STANDING

A student is considered to be in GOOD STANDING with KSI when he/she meets all KSI behavioral, academic and program expectations.

At the conclusion of the academic year on GOOD STANDING, the student will receive communication informing him/her of his/her updated program standing.

KSI WATCH Procedure

A student will be placed on WATCH if and when any of the Level 1 Actions occur on the chart below. A student shall remain on WATCH for one (1) full academic year. While a student is on WATCH, his/her coach will monitor the student’s progress in an effort to assist the student to return to GOOD STANDING. If a student fails to meet the requirements to return to GOOD STANDING at the end of the academic year on WATCH, he/she will be elevated to PROBATION.

If at any time while on WATCH, a student commits a Level 2 Action, he/she will be automatically placed on PROBATION the subsequent academic year. If at any time while on WATCH a student commits a Level 3 Action, he/she will be subject to DISMISSAL.
At the conclusion of an academic year on WATCH, the student will receive communication informing him/her of his/her updated program standing.

**KSI PROBATION Procedure**

A student will be placed on PROBATION if and when any of the Level 2 Actions listed below occur, or when he/she fails to return to GOOD STANDING at the conclusion of an academic year. While a student is on PROBATION, the student’s coach will monitor his/her progress in effort to assist the student to return to GOOD STANDING.

Any student that completes an academic year on PROBATION without returning to GOOD STANDING will be subject to DISMISSAL. If at any time while on PROBATION a student commits a Level 3 Action, he/she will be subject to DISMISSAL.

At the conclusion of an academic year on PROBATION, the student will receive a communication informing him/her of their updated program standing. Students who are on PROBATION or subject to DISMISSAL are not eligible for certain KSI program activities or the end of the year Incentives Program.

KSI Executive Leadership will exclusively handle all cases of DISMISSAL ensuring due process. Eligible students dismissed from the program will have the opportunity to submit a reinstatement application to appeal the decision. Reinstatement applications are reviewed to determine if an appeal will be granted.
Postsecondary Expectations
Postsecondary students are held accountable for academic, behavior, and program performance on an annual basis. Set forth below are the performance actions that determine whether a student will be placed on GOOD STANDING, WATCH, PROBATION or subject to DISMISSAL by KSI Executive Leadership.

Please note that the following chart represents both program status (if a student is active or inactive/dismissal) and program standing (GOOD STANDING, WATCH or PROBATION). Requirements for a student’s eligibility to receive the KSI Scholarship can be found in the Student Handbook section titled “Scholarship Eligibility”.

<table>
<thead>
<tr>
<th>Met All Program Expectations (Good Standing)</th>
<th>Behavior (Academic Year)</th>
<th>Academics (Academic Year)</th>
<th>Program (Academic Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• No institutional, criminal or KSI-related behavior infractions.</td>
<td>• Finished the academic year with at least a 2.5 GPA.</td>
<td>• Either attended or was excused from all KSI related programming.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Finished the academic year with at least 24 credits passed.</td>
<td>• Submitted transcripts, on-time, at the end of each academic term.</td>
</tr>
<tr>
<td>Level 1 Action (Watch)</td>
<td>• N/A</td>
<td>• &lt; 2.5 GPA for coursework taken in an academic year.</td>
<td>• 2 unexcused program absences.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• &lt; 24 credit hours passed in an academic year.</td>
<td>• Official transcripts turned in 1-5 days late.</td>
</tr>
<tr>
<td>Level 2 Action (Probation)</td>
<td>• N/A</td>
<td>• &lt; 2.0 GPA for coursework taken in an academic year.</td>
<td>• 1 ISP unexcused absence.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• 3 unexcused program absences.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Official transcripts turned in 6-10 days late.</td>
</tr>
<tr>
<td>Level 3 Actions (Subject to Dismissal)</td>
<td>• KSI or Institution Code of Conduct violation, suspension or expulsion.</td>
<td>• 3 or more failing (F) grades in one semester.</td>
<td>• 2 or more unexcused ISP absences.</td>
</tr>
<tr>
<td></td>
<td>• Criminal conviction.</td>
<td></td>
<td>• 4 or more unexcused program absences.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• No submission of official transcripts.</td>
</tr>
</tbody>
</table>
Appeal of Dismissal

Students who dismissed from KSI have the opportunity to appeal the dismissal. The appeal must be made using the reinstatement application that accompanies the dismissal notification letter. The completed form and any supporting documentation can be mailed via certified mail, hand-delivered (signature required) or emailed to:

Tanesha L. Ford  
Executive Director  
Kauffman Scholars, Inc.  
4801 Rockhill Rd.  
Kansas City, MO 64110  
appeals@kauffmanscholars.org

KSI must receive all appeals no later than seven (7) calendar days following the effective date of dismissal, which can be found on the dismissal letter. Any appeal received after that time will not be considered and the student will remain dismissed from the program.

All appeals received within the allowed time frame will be reviewed by the KSI Review Board, which may consist of members of the KSI Executive Leadership, the KSI Board of Directors, the Ewing Marion Kauffman Foundation ("EMKF") legal department, and/or other EMKF staff. Appeal meetings will commence no earlier than one week from the dismissal effective date as provided in the dismissal letters.

Students will be contacted by KSI to schedule an appeal meeting. The meeting will occur either by phone or in person to review the appeal and all supporting documentation presented. Students are solely responsible for scheduling and participating in an appeal. Parents cannot request or submit student appeals. If approved, parents can attend the appeal hearing meeting with the student’s permission.

The evaluation of final appeal decisions will be completed by the KSI Review Board and all appeal decisions will be finalized within one (1) week of the individual appeal meetings. The results of a student appeal will be mailed via certified and regular postal mail to the permanent address on the student record.

The decision made by the KSI Review Board on any dismissal appeal is final. If a student is reinstated, he/she will have no opportunity to appeal any future dismissal. KSI reserves the right to deny an appeal on a case-by-case basis.

Any student who is reinstated into the program as a result of the appeal process will re-enter the program on a final semester of PROBATION. Failure to return to GOOD STANDING at the end of the final semester of PROBATION will result in final program dismissal.
KSI SCHOLARSHIP & ELIGIBILITY

This section of the handbook covers the facilitation of the KSI scholarship which includes, scholarship award eligibility, approved institutions, housing/dining guidelines, transfer procedure, study abroad guidelines, and incentives. Please send all inquiries not addressed in the student handbook directly to your coach for review.

KSI Scholarship

The KSI scholarship covers tuition, mandatory student fees, books and reasonable campus-sponsored housing and dining. The following are general guidelines regarding the KSI Scholarship:

- The KSI scholarship is a final dollar scholarship. This means that after all federal, state, institutional, merit and other forms of financial aid have been applied to a student’s account, the KSI Scholarship will cover the remaining balance of eligible expenses;
- The KSI Scholarship is to be used in conjunction with other scholarships and financial aid;
- The KSI scholarship is an annually renewable scholarship with an end/termination date based on the student’s entry into postsecondary program and legal presence;
- The KSI scholarship’s annual renewal is contingent on students meeting both scholarship eligibility, program engagement requirements and legal presence;
- The KSI scholarship covers all eligible expenses beginning the academic school year following high school graduation through the fifth consecutive year of postsecondary enrollment, 150 credit hours post high school graduation or the completion of a Bachelor’s degree, whichever comes first; and
- Generally, the KSI Scholarship will only be administered during the traditional fall and spring academic terms. Students on the trimester or quarter system may have adjusted scholarship coverage. Any exceptions to the above regarding KSI scholarship coverage for non-traditional academic terms will require expressed, written consent from KSI Executive Leadership prior to enrollment.

Expenses Covered by the KSI Scholarship

The KSI scholarship will only cover the costs directly associated with successful degree completion. These items specifically include:

- Tuition and mandatory fees;
- Textbooks – up to $1000, any charges or $1000 must be pre-approved by KSI Executive Leadership;
- Housing* – on campus; up-to a maximum allotment approved by KSI Executive Leadership;
- Dining – on campus traditional meal plan offered by the college/university, up-to a maximum allotment approved by KSI Executive Leadership.
*For all housing accommodation options, it is the student’s responsibility to meet required application submission deadlines to secure the appropriate housing accommodations. Any student intending to reside in institution-sponsored housing must verify housing application submissions with his/her coach. Failure to meet these requirements could jeopardize the student’s enrollment status for the academic year.

Please note that many institutions do not guarantee campus housing beyond the first year. In these instances, it is the student’s responsibility to seek out and secure campus housing. The KSI Scholarship does NOT cover non-institution sponsored housing or dining options.

Expenses Not Covered by the KSI Scholarship

The following are examples of items not covered by the KSI Scholarship. This list includes, but is not limited to the following:

- Travel expenses;
- Parking tickets;
- Parking permits/passes;
- School apparel;
- Sporting and other special events on-campus;
- Snack/beverage/food purchases outside of approved meal plan option;
- Laundry;
- Residence hall decorating materials;
- Additional supplies (e.g., calculators, stethoscopes, laptops, clickers, etc.)
- Library fines;
- Conference fees;
- Organization membership dues;
- Personal expenses (e.g., phone bills, transportation, etc.);
- Parental costs (e.g., orientation fees, transportation, etc.);
- Repeat courses, unless approved by KSI Executive Leadership;
- Non-institution sponsored housing.

Housing Deposit and Enrollment Fees

In most cases, KSI will subsidize housing and enrollment deposit fees for KSI Network Institutions. These fees include housing deposits, enrollment deposits and student orientation fees (KSI does not subsidize guest/parent fees). Transfer students should consult with his/her coach to determine what fees the KSI scholarship will cover. Please keep in mind that payment of these fees is contingent on the student’s eligibility for the KSI Scholarship.

Housing & Dining Allotment

The KSI scholarship provides for a reasonable Housing & Dining Allotment for scholarship eligible students each academic year. The Housing & Dining Allotment is the maximum amount of KSI scholarship dollars that will be used to cover approved housing and dining expenses. The
Housing & Dining allotment will vary by institution and can only be used for institution sponsored housing and dining plans. Students who choose to reside on-campus will be subject to the Housing & Dining allotment. Students can select any on-campus housing/dining option of their choice within the total allotment.

Additionally, KSI will set a maximum allotment for dining plans at each institution both in- and out-of-network. Students who reside off-campus, and wish to take advantage of a dining plan, will be subject to the KSI-determined dining allotment. Any student who exceeds the KSI-determined dining allotment will be responsible for all charges in excess of the approved allotment.

The Housing & Dining allotment will be reset prior to the start of each academic year. The KSI scholarship is to be used for on-campus housing and on-campus dining only. Abuse of the KSI Housing/Dining policy will result in KSI Executive Leadership action up-to and including program dismissal. Please contact your coach for information regarding the housing allotment amount for a particular institution and/or general housing/dining questions.

KSI Network
Furthering KSI’s commitment to promoting both the academic and social development of all students in the program, KSI has developed an exclusive partnership with area colleges and universities to create the KSI Network of Partnering Institutions (“Network Institutions”). All Network Institutions share in KSI’s dedication to its students and have agreed to provide dedicated academic/social resources and support that are critical for achieving postsecondary success.

Attendance at an out of network institution requires KSI approval and is only available to students upon graduation from high school. Any collegiate student that wishes to transfer and retain KSI scholarship support will be required to attend an institution in the KSI Network.

KSI scholarship funding can only be applied to colleges and universities within the contiguous 48 states, whether in or out of network. Please refer to the KSI Study Abroad policy, located in this handbook, for additional information on what study abroad expenses are covered by the KSI scholarship.

Institutional Transfers
KSI strives to create a favorable match between each student and a postsecondary education institution with consideration of the student’s interests and aptitude. Occasionally, students request to voluntarily transfer to another institution or pathway. All transfers and/or pathway adjustment will require coach pre-approval.
All prospective transfer requests must be submitted and approved by KSI staff by July 1st for transfers prior to the start of the upcoming fall semester and December 1st for transfers prior to the start of the spring semester. In a case where a student fails to maintain satisfactory academic progress towards degree completion, KSI reserves the right to intercede and transfer the student to a postsecondary institution better suited to the student’s individual learning skills and needs.

Any student who either misses the transfer request deadline or has an unapproved transfer request may lose scholarship eligibility for that upcoming academic term. Students can only request transfers to KSI Network Institutions.

Students who begin at, or transfer to, a community college will not receive scholarship support at a four (4) year institution until a KSI approved degree, certificate or credential is attained. Exceptions will require expressed written consent from KSI Executive Leadership.

The KSI scholarship covers all eligible expenses beginning the academic school year following high school graduation through the fifth consecutive year of postsecondary enrollment, 150 credit hours post high school graduation or the completion of a Bachelor’s degree, regardless of a student’s postsecondary pathway.

Scholarship Eligibility
For initial and continued eligibility and participation in the KSI program, which includes receipt of the KSI scholarship, all students will be required to meet various submission deadlines throughout the calendar year.

Students will adhere to all scholarship expectations and standards as set forth in this Student Handbook and otherwise comply with all requirements, policies and procedures as deemed necessary by KSI to support the student’s successful participation in the program.

Any student who fails to comply with scholarship eligibility requirements will be subject to discontinuation of KSI scholarship support and/or program dismissal. A chart of document submission due dates can be found in the appendix (1A).

FAFSA Completion
All eligible students must complete and submit the federal government’s Free Application for Federal Student Aid (“FAFSA”). Eligible students must reapply for financial aid each year by completing the Renewal FAFSA online at fafsa.ed.gov. It is the student’s responsibility to reapply for aid each year.
The January 1\textsuperscript{st} priority date is the same each year and it is also the mandatory filing date for students in the KSI program. **PLEASE NOTE, failure to provide proof of FAFSA completion on or before January 1\textsuperscript{st} may lead to scholarship ineligibility for future semesters.**

**Award Package (Letter)**

After students complete the FAFSA, an award package (letter) is generated, typically in early to mid-April. This document spells out the details of each student’s financial aid package. A financial aid package is a collection of different types of financial aid from multiple sources. Packages may include grants, loans, and scholarships and is intended to help fill the gap between your ability to pay, the expected family contribution (“EFC”) and the cost of attendance (“COA”).

Keep in mind that students may not be able to obtain their Financial Aid Award Package (Letter) if the institution selects the student for financial aid verification. Failure to provide the award package (letter) by the deadline may lead to scholarship ineligibility for the upcoming fall semester.

**Financial Aid Verification**

Financial Aid Verification is the process of confirming, through additional documentation submission, that the information provided on a student’s FAFSA is accurate. The federal government requires all colleges and universities to verify and/or confirm the data reported by students and their parent(s) on the FAFSA.

Keep in mind that each year, students can be selected for Federal verification, local/institutional verification or both. It is the student’s responsibility to complete all items provided by either the Department of Education, or the student’s institution, to meet all verification requirements. KSI requires all students selected for verification to complete the process by the July 1\textsuperscript{st} deadline of that upcoming academic year. Failure to comply may lead to scholarship ineligibility in future semesters.

**Student Aid Report**

Within two (2) to four (4) weeks after submitting the FAFSA, students should receive a Student Aid Report (“SAR”) from the federal processor acknowledging the completion of FAFSA processing. Students are required to review the SAR carefully for any incorrect information. Questions about FAFSA processing, or how to amend incorrect information, can be directed to the Federal Student Aid Information Center (1-800-4-FED-AID) or the FAQ portion of the FAFSA website at [fafsa.ed.gov](http://fafsa.ed.gov).

Failure to submit the SAR prior to the deadline may lead to scholarship ineligibility for future semesters.
Course Schedule

Students are required to provide their coach with a copy of their course schedule prior to the start of each academic term. If there are any changes to the original schedule at any time prior to or during the academic term, it is the student’s responsibility to provide KSI those updates. Failure to comply may lead to scholarship ineligibility for that upcoming fall/spring semester.

Student Release of Records (FERPA)

In order for KSI to facilitate both financial and non-financial supports, a release of records must be on file for KSI at the student’s institution. Keep in mind that at several institutions additional paperwork (sponsorship or third-party support forms) may also be required. Additionally, at some institutions the student may need to update the forms (semi) annually.

It is the student’s responsibility to ensure that an up-to-date form is on-file at the appropriate institution at all times. Failure to have a current release of records on file for KSI interrupts the scholarship facilitation process and may lead to scholarship ineligibility for that upcoming fall/spring semester.

Supplemental Scholarship Applications

As stewards of Mr. Kauffman’s legacy, students are expected to make a financial contribution to their postsecondary experience by pursuing supplemental scholarships to offset the last dollar contribution from KSI. All postsecondary students must complete two (2) or more additional scholarship applications each year.

Each submitted scholarship must be a minimum of $500 and will be subject to coach approval. Failure to comply may lead to scholarship ineligibility for that upcoming fall semester.

Ineligible to Complete the FAFSA

KSI students who are not eligible to complete the FAFSA, or cannot complete the FAFSA due to circumstances beyond their control, will be considered/reviewed on a case-by-case basis with respect to eligibility for the KSI scholarship.

If a FAFSA completion exception is made and the student is otherwise eligible for the KSI Scholarship, the student will receive the KSI scholarship and can attend any institution within the KSI Network. Students who are ineligible to complete the FAFSA may also have additional requirements for scholarship eligibility as determined by KSI legal counsel.

Additional Scholarship Items

Outside of the items that students must submit/complete in order to remain scholarship eligible, there are additional items that students should be reasonably familiar with as these items can impact scholarship eligibility, full/partial payment of the scholarship and in some cases program status/standing.
Third-Party Billing

Each semester, scholarship payments from KSI are facilitated through third-party billing agreements. These agreements provide a centralized and efficient payment process between the institution and KSI. Students who attend institutions with formalized third-party billing agreements will not be required to submit a formal semester invoice to KSI for payment. Keep in mind that all holds on a student’s account (e.g. personal charges, library fines, parking fines, financial aid verification, etc.) will need to be reconciled before the start of each semester.

Failure to reconcile student account holds may prevent KSI from making scholarship payments. Students who attend institutions without a third-party billing agreement on file will be required to submit a formal invoice to KSI for payment. Students who attend institutions without a third-party agreement will be responsible for obtaining and submitting billing information to their coach.

Students are responsible for checking with their coach to determine if their institution has a third-party billing agreement in place. If a student fails to meet the deadline for submission of billing information, or is tardy in reconciling student account holds, the student will be responsible for paying any and all late fees incurred as a result of late payment.

Overages/Refunds

In certain cases, a student may have a credit balance on his/her school billing account. When this occurs, some schools will remit a check or electronic deposit to the student. If a student receives a refund check or credit to the student account from his/her school, the student must notify his/her coach immediately. These funds are specifically intended to be applied toward approved scholarship expenses (see above “Expenses Covered by the KSI Scholarship”).

Use of these funds for unapproved expenses or failure to report an overage in a timely manner will result in immediate termination of the KSI Scholarship and dismissal from the program. Furthermore, KSI reserves the right to pursue legal recourse to recover any unauthorized monetary expenditures.

Scholarship Institution

Similar to the awarding of federal and state financial aid, the KSI Scholarship will only be facilitated to a single institution each academic term. Students will not be able to split the KSI scholarship to cover educational fees at multiple institutions unless expressed, written consent is provided from KSI Executive Leadership.

Satisfactory Academic Progress Expectations

Financial aid is contingent upon continued satisfactory progress toward a degree or certificate. To retain the KSI Scholarship, a student must meet KSI’s Satisfactory Academic Progress (“SAP”) expectations, which may be more rigorous than the SAP policy of the institution the student attends. Students must meet KSI’s minimum requirements for full time enrollment and GPA. The academic progress of students is monitored by coaches each semester.
KSI requires students to enroll in at least 12 credit hours per semester and earn a minimum 2.5 GPA to meet the program expectation for Satisfactory Academic Progress. Please keep in mind that this standard is higher than the full time enrollment (a minimum of 12 credit hours and 2.0 GPA) requirement for Federal and institutional financial aid.

Satisfactory Academic Progress ensures full time enrollment toward degree completion within five (5) years. Students who do not enroll in and complete at least 12 credit hours may lose eligibility for Federal and institutional financial aid; this loss of supplemental funding may also jeopardize continued receipt of the KSI Scholarship. If a student does not meet satisfactory academic progress in two (2) consecutive semester grading periods, the student will be subject to postsecondary pathway adjustment up-to program dismissal.

Return of Title IV Funds
Completion of the FAFSA provides eligible students with Title IV funds such as the Pell Grant. Title IV funding requires students to take a minimum course load of twelve (12) credit hours and successfully complete anywhere from 66% to 75% of all credit hours attempted, based on a student’s respective institutional policy. When a student does not complete the minimum credit hour requirement and/or does not succeed at the required percentage of credit hours, the college is compelled to return Title IV funds to the federal government.

When the college returns Title IV funds, the charge is incurred to the student’s account. Unpaid charges on the student’s account due to the loss of Title IV funds are the student’s responsibility for payment. The KSI scholarship DOES NOT cover any charges as a result of the return of Title IV funding. Institutions reserve the right to not allow students to register for courses until repayment is arranged.

Health Insurance
Health insurance is generally not covered by the KSI Scholarship. However, some postsecondary institutions may require students to have health insurance. It is the student’s responsibility to provide KSI reasonable notice of any institutional requirements for health insurance. Exceptions will be considered on a case-by-case basis and will need to fall within the scholarship guidelines for other educational related payments for additional consideration.

Study Abroad
The KSI scholarship will cover all eligible expenses for students electing to participate in an approved study abroad experience. The following are stipulations for participation in a study abroad experience utilizing the KSI scholarship:

- The student must submit all program documentation to his/her coach for approval (detailed program overview, breakdown of fees, etc.) the academic term prior to the study abroad experience;
• Eligible fees include those normally covered at the primary institution (tuition, mandatory student fees, books and reasonable campus-sponsored room and board);

• Costs identified as Program Expenses, Program Fees, or similar costs charged for participation in the study abroad experience are NOT covered by the KSI scholarship. Please refer to your coach for additional details and clarification;

• The KSI scholarship does not cover airfare, passport/visa costs, health insurance or any required immunizations or vaccines related to a study abroad experience. These incidentals are the responsibility of the student;

• The KSI scholarship can only be administered to the student’s primary institution to cover eligible expenses that occur during the fall and/or spring academic terms. Payment will not be made to a study abroad institution or third party program operator (this includes housing and dining costs).

For additional information regarding Study Abroad guidelines, please review the Study Abroad Addendum in the appendix (1B).

Grades and Transcript Submissions

Students are required to submit an official transcript of their final grades at the conclusion of each academic term. Towards the conclusion of each academic term, notification will be sent to students and parents with information on submission deadlines. Failure to submit transcripts after the conclusion of each academic term will lead to program dismissal.

Dual Degree Programs

The KSI scholarship will cover the costs of students pursuing dual or combination degrees under the following conditions:

• The student must receive documented approval from his/her coach;

• The term of the KSI Scholarship will not extend beyond the standard term as set forth in this Handbook (CREDIT HOURS/YEAR TERM); and

• The KSI Scholarship can only be administered during the Fall & Spring semester.

In order to receive full scholarship coverage, all students considering these types of programs must consult with his/her coach prior to starting the program.

Course Retakes

Generally, the KSI scholarship does not cover repeat coursework. Students are not allowed to retake any course utilizing the KSI Scholarship without consent from their Coach and KSI Executive Leadership.

Definition of Attempted and Completed Credits

• A course is considered attempted, but not completed, if a grade of I (Incomplete), W/D (Withdrawn), NC (No Credit), T (Transfer), or blank is assigned to that course;
• A repeated course is also considered attempted, but not completed;
• A course is considered complete if a grade of at least a D- is received, or if a CR (Credit) grade is assigned; and
• Audited courses are not acceptable for financial aid purposes.

Textbook Allotment

The KSI Scholarship will initially cover the cost of textbooks for approved academic terms up to the amount of $1,000. In most instances, KSI will have an agreement in place with an institution for the procurement of textbooks. If a student anticipates that the total costs of textbooks will exceed $1,000, it is the student’s responsibility to work with his/her coach for an override approval.

The KSI scholarship can cover the costs of textbooks not available at the institution’s bookstore and need to be purchased elsewhere. In these instances, it is the student’s responsibility to contact his/her coach to make alternative arrangements.

Please note that the KSI scholarship will not cover costs for lost or stolen textbooks. Additionally, the textbook allotment can only be used for print and/or electronic textbooks. As a reminder, the KSI scholarship does not cover costs for supplies.

Textbook procedures vary by institution. It is the student’s responsibility to work with his/her coach to ensure use of the proper protocol.

INCENTIVES PROGRAM

KSI offers an incentives program for collegiate students. The KSI Incentives Program is based on students obtaining outside scholarships and postsecondary completion. Students who apply and earn outside scholarships will have the opportunity to receive a percentage of what was earned. Outside scholarships must appear on the student bill that is invoiced to KSI.

Additionally, students who earn an associate degree within the first two (2) years of postsecondary coursework or a bachelor degree within the first four (4) years of postsecondary coursework will have the opportunity to receive the graduation incentive. Receipt of either postsecondary incentive transitions a student to KSI Alumni status, voiding any remaining years scholarship eligibility.

All postsecondary incentives are monetary and will be issued by Automated Clearing House (ACH) – direct deposit. Additional information and details about the KSI Incentives Program can be found in the appendix (1C).

Notice of Disclaimer

Any cash value rewards are subject to legal approval. Students and parents shall consider any/all tax implications of incentives received through KSI.
APPENDIX

1A. Document Submission Deadline Chart

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<tr>
<th>DUE: January 1st</th>
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<tbody>
<tr>
<td>Proof of FAFSA Completion</td>
<td>Scholarship Eligibility</td>
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<tr>
<td>Student Aid Report (SAR)</td>
<td>Scholarship Eligibility</td>
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<tr>
<td>Spring Course Schedule</td>
<td>Scholarship Eligibility</td>
</tr>
<tr>
<td>Fall Transcript (official or unofficial)</td>
<td>Program Standing</td>
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<tr>
<td>Official Transcript</td>
<td>Program Standing</td>
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<th>DUE: July 1st</th>
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<td>Degree Audit</td>
<td>Scholarship Eligibility</td>
</tr>
<tr>
<td>Fall Course Schedule</td>
<td>Scholarship Eligibility</td>
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<td>Financial Aid Package</td>
<td>Scholarship Eligibility</td>
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<tr>
<td>FERPA Release(s)</td>
<td>Scholarship Eligibility</td>
</tr>
<tr>
<td>Proof of Two (2) Scholarship Application Submissions</td>
<td>Scholarship Eligibility</td>
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</table>
1B. Study Abroad Addendum

The KSI scholarship will cover all eligible expenses for students electing to participate in a KSI approved study abroad experience. Eligible expenses include tuition and mandatory fees, an allotment for housing/dining along with required textbook costs incurred during the fall and/or spring academic terms.

Scholarship payments will not be made to a study abroad institution or third party program operator (this includes housing and dining costs). The KSI scholarship will not cover program fees or travel costs (e.g. visas).

The following are stipulations for student participation in a study abroad experience utilizing the KSI scholarship which can also be found online at http://www.kauffmanscholars.org/our-programs/programs-overview/documents-and-forms/student-handbook.

- The student must submit all program documentation to his/her coach for approval (detailed program overview, breakdown of fees, etc.) the academic term prior to the study abroad experience;
- Eligible fees include those normally covered at the primary institution (tuition, mandatory student fees, books and reasonable campus-sponsored housing and dining);
- Costs identified as Program Expenses, Program Fees, or similar costs charged for participation in the study abroad experience are NOT covered by the KSI scholarship;
- The KSI scholarship does not cover airfare, passport/visa costs, health insurance or any required immunizations or vaccines related to a study abroad experience. These incidentals are the responsibility of the student;
- The KSI scholarship can only be administered to the student’s primary institution to cover eligible expenses that occur during the fall and/or spring academic terms. Payment will not be made to a study abroad institution or third party program operator (this includes housing and dining costs).
- Private or institutional scholarships specific to a study abroad experience can be used to directly off-set items not covered if Kauffman Scholars, Inc. receives documentation from the primary institution stating that the aid is specifically for items not covered. Any other combination aid (grants/scholarships) should be deducted from the student balance prior to invoicing KSI.

ITEMS COVERED:

- Tuition and mandatory fees accrued during the fall/spring academic term;
- Housing and meal plan combined up to the allotted amount as listed in the most recent Letter of Commitment;
- Textbooks up to $1,000;

ITEMS NOT COVERED:

- Program fees;
- Any type of transportation;
- Health insurance;
- Supplies, personal expenses;
- Passport/visa costs;
- Immunizations.
1C. Incentives FAQs

Q: What are the incentive award options?

A: There are two (2) types of incentive awards:

1. **Graduation Incentive** – Any student that attains an associate degree in first two (2) years or less of postsecondary coursework OR attains a bachelor degree in the first four (4) years or less of postsecondary coursework is initially eligible for this incentive;
   - Associate’s Degree (2 years or less) = $1,000;
   - Bachelor’s Degree (4 years or less) = $3,000.

   Eligibility for the graduation incentive is contingent on KSI’s receipt of an official transcript or equivalent documentation that verifies a credential/degree attained by the July 1 deadline (student’s with a summer graduation date will need to work one-on-one with Ms. Solissa McKay – smckay@kauffmanscholars.org).

2. **Scholarship Incentive** – Any student that accrues at least $1,000 in outside scholarships on their student account for the academic year may qualify for an incentive of 10% of the total scholarship amount for the academic year. The total scholarship award amount cannot exceed the KSI calculated cost of attendance for your institution.

   Students must be in GOOD STANDING or returning to GOOD STANDING to receive an incentive. Approved incentive recipients will receive their awards around September 1.

Q: What is the KSI calculated cost of attendance?

A: The maximum amount of scholarship support KSI will provide for approved educational expenses in an academic year. Approved educational expenses covered exclusively include tuition and mandatory fees, required texts, an allotment for housing and dining along with any preapproved matriculation fees (e.g. housing deposits, admission applications).

Q: What types of scholarships count towards the scholarship incentive award?

A: Scholarships that are both recorded on, and credited to the student account may initially count towards eligibility for the scholarship incentive. Any scholarship not accounted for on the invoice KSI receives from the institution will not count towards the scholarship incentive; this includes both institutional and outside scholarships. The scholarship(s) total must meet or exceed $1000 in an academic year for initial eligibility.

Q: If I receive my associate’s degree in less than two (2) years, can I receive both that incentive and the bachelor’s degree incentive if I am able to attain my bachelor’s degree in four (4) years or less?
A: The graduation incentive reward is terminal. Regardless of the graduation incentive, once received, you will transition to the alumni portion of the program forfeiting any additional KSI scholarship support. In short, you cannot receive both incentives; it is an either/or scenario.

Q: Can I apply for both the graduation and scholarship incentive during the same academic year?

A: Yes. If at least $1,000 in (non-KSI) scholarship aid is applied to your student account and you attain a qualifying credential or degree, you can apply for and are initially eligible for both incentives.

Q: How do I apply for an incentive award?

A: The incentive application goes live at the conclusion of the spring semester of each academic year. All applications must be submitted electronically via the KSI Engagement Portal before the July 1 deadline. All applications must be accompanied by an IRS Form W-9, which also must be completed, signed and resubmitted by July 1. A complete and signed ACH Authorization form must also accompany each incentive application. NO PHYSICAL CHECKS WILL BE ISSUED!

Q: How do I access the KSI Forms site?

A: You can link from the Engagement Portal login page by clicking the KSI Forms link found on the top banner on your homepage (after logging into the Engagement Portal).

The Forms link will take you to your personal KSI Forms site. There are two (2) separate applications for the scholarship incentive and the graduation incentive, as shown below. Please
be sure to complete both forms (and attach the requested documentation) if you wish to apply for both incentives.

Q: What if I cannot access my account on the KSI Forms site?

A: Your username for the KSI Engagement Portal is your KScholars.org email address. If you lost your password, it can be reset by following “Can't Access Your Account” link on the main login page.

If you are still unable to access your account, be sure to reach out to your coach with enough notice to reset your login prior to the deadline. Any student who submits a late application and/or documents because of an inability to login to the KSI Forms site WILL NOT be approved for an incentive.

Q: What if I have more scholarships to report than the six (6) spots provided on the application?

A: If you have more scholarships to log beyond the six (6) spots provided on the electronic application, please use the additional information box to provide the name(s) of the award(s), the amount(s) awarded, and the academic term(s) awarded (Fall, Spring, or Both).

Q: Will KSI send a paper incentive check?

A: No. ALL INCENTIVES WILL BE AWARDED VIA DIRECT DEPOSIT. All applicants must attached a complete ACH Authorization when submitting an incentive request. Please keep in mind that all incentive awards are taxable and any financial disclosures related to your incentive award will be sent to the address provided on your IRS Form W-9.

Q: Is the incentive award taxable?

A: Yes. Please keep in mind that all incentive awards are taxable and any financial disclosures related to your incentive award will be sent to the address provided on your IRS Form W-9.
2A. Staff Directory

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