

STATE NEED GRANT

2011 Workshops



STATE NEED GRANT

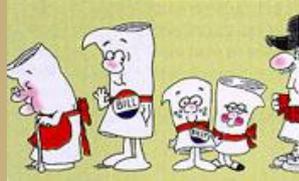
Helping Make College Affordable



TODAY'S TOPICS

- **2011 Legislative Session**
- **SNG 2011-2012 Budget**
- **MFI cutoffs/Award amount details**
- **Program/Policy reminders**
- **Upcoming program changes and enhancements**
- **General reminders/Timelines**

2011 LEGISLATIVE SESSION



House Bill 1795- adds to SNG statute:

“The board, in consultation with four-year institutions of higher education, and the state board for community and technical colleges, shall develop award criteria and methods of disbursement based on level of need, and not solely rely on a first-come, first-served basis.”

2011 LEGISLATIVE SESSION

The final conference budget:

- Keeps pace with tuition and fee growth for public institutions.
- Changes the growth rate for the private sector awards to 3.5%.
- Reduces the percentage of award for new students attending proprietary institutions.

SNG 2011-2012 BUDGET



\$192.5*	General Fund State appropriation
\$ 73.5	Opportunity Pathway appropriation
<u>\$.5</u>	Less-than-Halftime appropriation
<u>\$266.5</u>	Available SNG funds

*In millions

Note: Federal LEAP/SLEAP funding has been suspended.

SNG STATISTICS

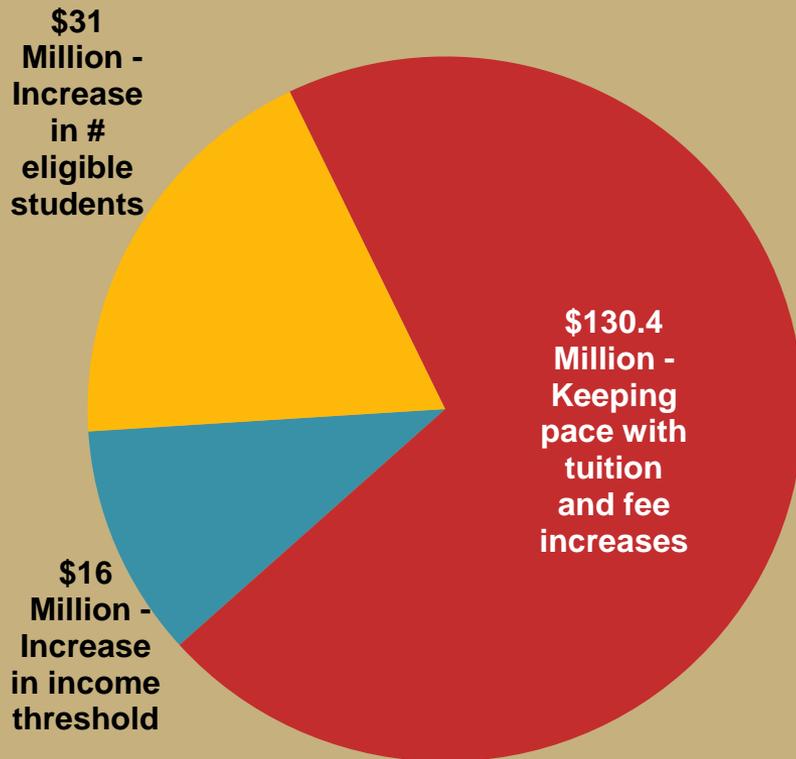
Despite an unprecedented budgeting challenge, the Legislature continues to hold the very lowest income students harmless from the tuition and fee increases on a dollar for dollar basis.

2007-08	2008-09	2009-10	2010-11	2011-2012
\$181*	\$194*	\$209*	\$227*	\$267*
69,478 Students served	71,995 Students served	±72,000 Students served	±72,000 Students served	±72,000 Students served

*In millions

- 48% dollar growth since 2007-08
- 68 schools are currently participating

GROWTH FACTORS IN SNG FUNDING



Total increase since 2001-02 is \$177.6 million

- 73.6% due to tuition increases
- 17.4% due to increased number of eligible students
- 9% due to increased income threshold (from 55% to 70% MFI)

SNG 2011-2012 MFI CHART

MFI for 2011-2012 SNG Program (rounded to nearest \$500)					
Family Size	50%	55%	60%	65%	70%
1	21,000	23,500	25,500	27,500	29,500
2	28,000	30,500	33,500	36,000	39,000
3	34,500	37,500	41,000	44,500	48,000
4	41,000	45,000	49,000	53,000	57,000
5	47,500	52,000	57,000	61,500	66,500
6	54,000	59,500	64,500	70,000	75,500
7	55,000	60,500	66,000	71,500	77,000
8	56,500	62,000	67,500	73,500	79,000
9	57,500	63,500	69,000	75,000	80,500
10	59,000	64,500	70,500	76,500	82,500

Note: Maximum MFI range remains at 70% MFI.

MFI RANGE: PERCENTAGE OF AWARD

Percentage of full-time award covered at different MFI ranges	
MFI Range	2011-2012 Percentage of Award
0%-50%	100%
51%-55%	70%
56%-60%	65%
61%-65%	60%
66%-70%	50%

- No changes from 2010-2011

SNG AWARDS

- Awards
 - Calculated as a percentage of tuition and fees.
 - Cover more than 90% of tuition and fees for public sectors.
 - A \$100 award variance allowance is permitted for *enrollment adjustments* associated with awards exceeding tuition.
 - Pell offset of \$15 is incorporated in the 2011-12 awards.

- Less than Halftime
 - The 2011-13 budget includes less than halftime enrollment in SNG funding and awarding.
 - Schools are expected to serve this enrollment category within their distribution.
 - No more separate fund tracking.
 - Enrollment changes are now seamless.
 - This enrollment category will be captured in interim reports.

SNG AWARD AMOUNTS

Sector	Median Family Income				
	0% - 50%	51% - 55%	55% - 60%	61% - 65%	66%-70%
Research	\$ 9,280	\$ 6,496	\$ 6,032	\$ 5,568	\$ 4,640
Private Four Year	\$ 8,214	\$ 5,750	\$ 5,339	\$ 4,928	\$ 4,107
DigiPen and NWCA (new students*)	\$ 4,107	\$ 2,875	\$ 2,670	\$ 2,464	\$ 2,054
WWU	\$ 6,751	\$ 4,726	\$ 4,388	\$ 4,051	\$ 3,376
CWU, TESC	\$ 6,629	\$ 4,640	\$ 4,309	\$ 3,977	\$3,315
EWU	\$6,446	\$ 4,512	\$ 4,190	\$ 3,868	\$ 3,223
Community and Technical Colleges	\$ 3,256	\$ 2,279	\$ 2,116	\$1,954	\$1,628
Private Vocational	\$2,713	\$1,899	\$1,763	\$1,628	\$1,357
Private Vocational (new students*)	\$1,357	\$ 950	\$ 882	\$ 814	\$ 679
2011-12 Dependent Care Allowance	\$ 862	\$ 603	\$ 560	\$ 517	\$ 431

**New students=not eligible for SNG in prior year at any SNG institution*

OPPORTUNITY INTERNSHIP GRADUATES

What you need to know:

- Students are given a Certificate of SNG eligibility by WDCs.
- We have stressed that FAFSAs should be completed, and that program eligibility is not an entitlement.
- The two scenarios that would create eligibility outside of regular SNG eligibility are:
 1. Apprenticeship program participants
 2. Incomes above SNG MFI threshold
- Approximately 300 eligible for second cohort in 2011-2012 – we will notify schools of eligibility lists post HS graduation.
- Opportunity Internship awards can be used for any educational costs – i.e., apprenticeship program tools.
- Apprenticeship awards will equal a $\frac{1}{4}$ enrollment SNG award.
- HB 1599 (PASS) expands program mngt. to school districts.

MAINSTREAM SNG VERSUS OIG

	Mainstream SNG	Opportunity Internships Graduates
Financial Eligibility:	FAFSA income	Free and Reduced-price Lunch eligibility (using WIA eligibility)
Eligibility determined by:	Financial Aid Offices at participating SNG Institutions	Workforce Development Councils
Awards/Payments requested by:	Financial Aid Offices at participating SNG Institutions	Financial Aid Offices at participating SNG Institutions
Matriculation required?	Yes	No
Award amounts:	Based on enrollment level	Based on enrollment level
Time limit to begin using SNG?	No	Yes - 1 year post high school graduation
Program quarters of eligibility over lifetime:	15 quarters of eligibility (5 years)	3 quarters of eligibility (1 year)

OPPORTUNITY INTERNSHIP ELIGIBILITY



**Opportunity
NEXT EXIT**

For the best chance at receiving State Need Grant funds:

- Complete the **FAFSA** (Free Application for Federal Student Aid) in January of your senior year @ www.FAFSA.com
- Meet college admission and financial aid deadlines specific to each institution
- Include school codes on the FAFSA for every school you are considering attending

Other helpful hints:

- Visit www.thewashboard.org to learn about scholarship opportunities
- Visit www.hecb.wa.gov to learn about other state financial aid programs
- Stay in touch with your Workforce Development Council for mentoring and interview contact

SELF HELP CLARIFICATION

Self Help *does* include:

- Work, loans, scholarships, unmet need
- Conditional Scholarship Programs
- Governor’s Scholarship for Foster Youth
- Passport to College Promise Scholarship
- . . . see program manual for entire list

Self Help *does not* include:

- Opportunity Grant
- Chafee Educational Training Voucher (ETV)

If a source is not listed under the Program Manual guidance consider the following:

*When determining if an unlisted source shall be treated as **Self-Help**, consider whether the level of effort to earn the source equates to the kind of effort necessary to earn other sources such as a merit scholarship based on a substantial period of academic achievement.*

SNG REPAYMENT POLICY



- Basic formula for **known last date of attendance**, prior to or on 50% of the term:
 1. $\text{SNG \% earned} = \frac{\text{days in attendance}}{\text{calendar days in term}}$
 2. $100\% \text{ less SNG \% earned} = \text{\% of unearned SNG}$
 3. $\text{\% of unearned SNG} \times \text{grant amount}$
 4. Product of line 3. $\times 50\%$ to determine SNG repayment due
- If **last date of attendance is not known**, assume 50% earned but repayment amount is not multiplied by 50% (no step 4)
- **No shows** will owe 100% of original award

Note: All monies, whether disbursed to the student account or directly to the student, shall be included in the repayment calculation.

Clarification: Funds returned to school's SNG reserve should reduce the student's net "award."

EFT REIMBURSEMENT REQUIREMENT

All schools are required to convert to Electronic Fund Transfer reimbursement by July 1, 2011.

- Eliminates paper warrants, saves public dollars.
- Private institutions pay their students, then request reimbursement from the HECB. Funds are reimbursed within 3-5 business days.
- HECB sends a lump-sum electronic fund transfer to private institution, with a report of corresponding students.
- Requests can be made any day of the week and are processed by HECB within 24 hours.

AWARD MANAGEMENT

All private sector schools are required to convert to the running balance method of award tracking for 2011-2012.

- Expands Gonzaga/Seattle U. pilot to all private schools.
- Provides more flexibility for institutions to manage awards.
- Adjusts award amounts and enrollment statuses up or down in Portal without sending an institution check or returning warrants to HECB
 - Only would need to return funds at year end
- Adjustment/Cancellation form no longer necessary.
- Our IT division and SNG staff will send memo updates.

NEW “CSAW” AWARD WAREHOUSE

CSAW = College Bound/SNG Award Warehouse

- Replaces the SNG Payment Utility in the Portal and the Interim Reporting Tool in the secure site.
- Designed to accommodate upcoming College Bound Scholarship (CBS) awards in the fall of 2012.
 - Since CBS will be tightly coupled with SNG, a new system that can handle both award types became necessary.
- Ready for use in August, after 2010-11 is closed out.

“CSAW” - WHAT’S IN A NAME?

- The term “warehouse” describes what the new tool is:
 - A place to store information (*will reside in the Portal*).
 - Accommodates moving and changing student awards.
 - Can adjust MFI, family income, enrollment status etc.
 - Facilitates an exchange of awards for dollars.
- CSAW shares the concepts of a seesaw:
 - Requires partnership to work (HECB and schools).
 - Awards move up and down seamlessly.
 - It’s easy and fun!

NEW “CSAW” AWARD WAREHOUSE

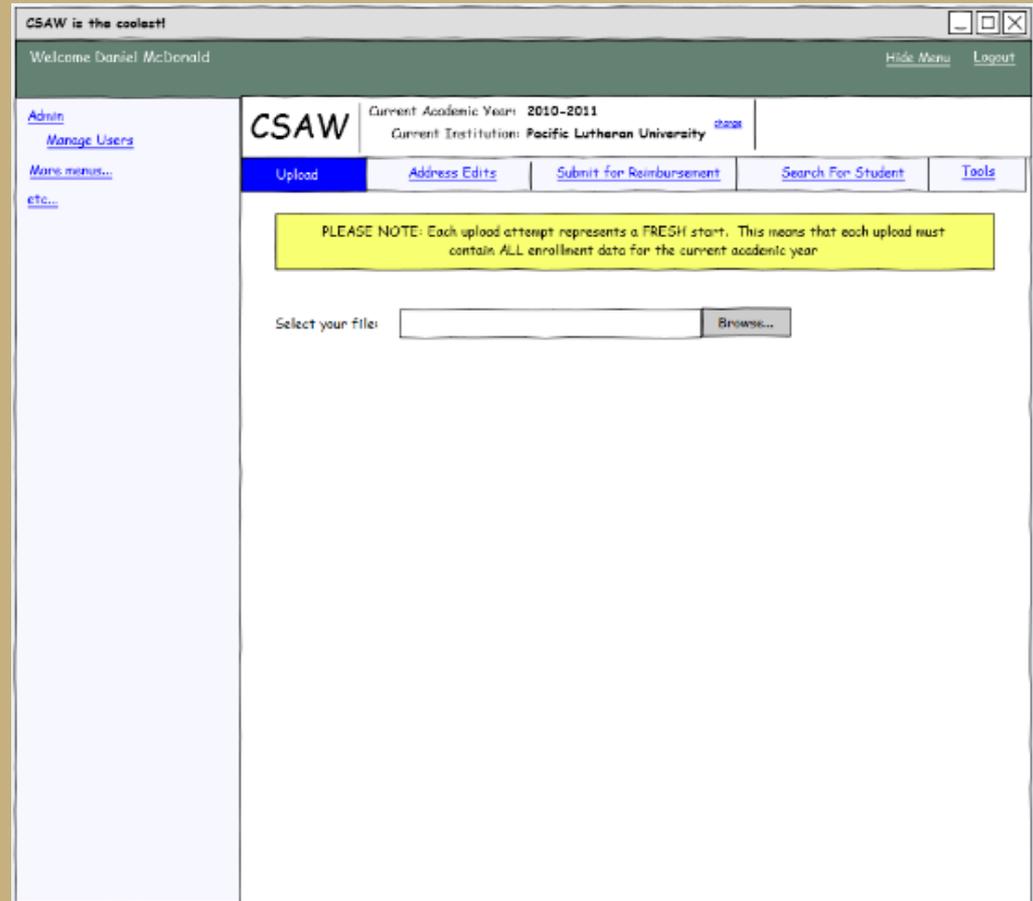
- **Timeline:**
 - Private sectors begin using it in August 2011.
 - Publics may use for first interim report in November.
 - Required use of new file format by 2012-2013.

- **Process Improvements:**
 - Streamlines CBS and SNG processes.
 - Incorporates all current features of SNG Payment Utility and Interim Tool and improves upon them.
 - Provides a clearer interface for addressing edits.
 - Can work while your file is uploading.

NEW “CSAW” AWARD WAREHOUSE

CSAW Main Menu Screen:

- Upload files
- Address edits
- Submit Interim Reports
- Submit requests for reimbursement
- Search for a student
- Access CSAW tools



UPLOADING A FILE TO CSAW

- CSAW provides a running total of your awards as the file processes.

CSAW is the coolest!

Welcome Daniel McDonald

CSAW Current Academic Year: 2010-2011 Processing file... 80% Complete
Current Institution: Pacific Lutheran University Processing file... 54% Complete
Processing file... 32% Complete

Upload Address Edits Submit for Reimbursement Search For Student Tools

Award Summary					
	# Awards	Served	Amount	Unserved	Amount
Summer 1	48	2	\$1,930	46	\$61,143
Fall	568	558	\$1,876,903	10	\$38,231
Winter	0	0	0	0	0
Spring	548	516	\$1,213,554	32	\$105,764
Summer 2	0	0	0	0	0
	1,164	1,076	\$3,092,387	88	\$205,138

CSAW is the coolest!

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CSAW Current Academic Year: 2010-2011 Processing file... 100% Complete
Current Institution: Pacific Lutheran University Processing file... 86% Complete
Processing file... 64% Complete

Upload Address Edits Submit for Reimbursement Search For Student Tools

Award Summary					
	# Awards	Served	Amount	Unserved	Amount
Summer 1	60	2	\$1,930	58	\$89,848
Fall	702	690	\$2,033,903	12	\$38,231
Winter	0	0	0	0	0
Spring	654	619	\$1,818,742	35	\$105,764
Summer 2	0	0	0	0	0
	1,416	1,311	\$3,852,645	107	\$233,843

Save Discard file

- Once upload is complete, you have the option to save or discard the file.

ADDRESSING EDITS IN CSAW

- Edits are addressed in much the same way as before, and must be corrected before submitting payment requests or interim reports.

CSAW is the coolest!

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CSAW Current Academic Year: **2010-2011** [change](#) Processing Edits... 67%
 Current Institution: **Pacific Lutheran University** [change](#) Processing Edits... 63%
 Processing Edits... 88%

[Upload](#) [Address Edits](#) [Submit for Reimbursement](#) [Search/Add](#) [Tools](#)

Award Amount is greater than the suggested maximum payment amount, most likely because of an MFI issue 17 edits unaddressed
 NonOverrideable

Name	Term	Enrollment	Amount	Max Amount	MFI %	
Kupp, Craig (xxx-xx-1232)	Fall	Full-Time	\$3,859	\$2,669	55%	edit
Sigurdson, Sig (xxx-xx-5378)	Spring	Half-Time	\$1,235	\$1,136	65%	edit
Carlson, Evans (xxx-xx-5374)	Summer1	Half-Time	\$1,335	\$1,235	60%	edit
Bankson, Diane (xxx-xx-3567)	Fall	Full-Time	\$2,471	\$2,273	65%	edit
Whalen, Tom (xxx-xx-9635)	Fall	Full-Time	\$2,273	\$1,876	70%	edit
Carlson, Ted (xxx-xx-2435)	Spring	Full-Time	\$3,859	\$2,669	55%	edit
Wolfe, Chris (xxx-xx-5348)	Fall	Full-Time	\$3,859	\$2,669	55%	edit

Total awards exceed student's QER 4 edits unaddressed
 Overrideable

This award cannot be paid because the student has unpaid receivables 2 edits unaddressed
 NonOverrideable

Family Income Exceeds MFI threshold 8 edits unaddressed
 NonOverrideable

EDITING RECORDS IN CSAW

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CSAW Current Academic Year: **2010-2011**
 Current Institution: **Pacific Lutheran University** [change](#)

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This tool allows you to edit or delete an existing Need-Based Grant Eligible Student and related awards or add a new student and new potential awards.
 If an award has been created and paid, however, neither the award nor the student can be deleted using this tool.

SSN: 314-15-9265
 Name: Last, First M
 Family Size: 2
 Number in College: 1
 Family Income: 20,896.00
 MFI Category: 55%

IN RECEIVABLE STATUS
 (Pacific Lutheran University)

QER: 9 ⓘ

Year	Summer1	Fall	Winter	Spring	Summer2	Total
2010-2011	0	1	1	1	0	3
2009-2010	0	1	0.5	1	0.5	3

Quarters Used: 6 Quarters Remaining: 9

Term	SNG			CB			Enrollment
	Amount	DCA	Served	Amount	DCA	Served	
Summer1							
Fall	\$2,000	\$0.00	Served Awarded	\$100	\$0.00	Served Awarded	Full Time
Winter	\$1,000	\$0.00	Cancelled	\$0.00	\$0.00		Half Time
Spring	\$500	\$0.00		\$0.00	\$0.00		Full Time
Summer2			Delete				

[Edit](#)

CSAW Current Academic Year: **2010-2011**
 Current Institution: **Pacific Lutheran University** [change](#)

[Upload](#) [Address Edits](#) [Submit for Reimbursement](#) [Search/Add](#) [Tools](#)

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IN RECEIVABLE STATUS
 (Pacific Lutheran University)

QER: 9 ⓘ

Term	SNG			CB			Enrollment
	Amount	DCA	Served	Amount	DCA	Served	
Summer1	0	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	0	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	Not Enrolled ▼
Fall	2,000	0.00	<input checked="" type="radio"/> Served <input type="radio"/> UNServed	100	0.00	<input checked="" type="radio"/> Served <input type="radio"/> UNServed	Full Time ▼
Winter	1,000	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	0	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	Half Time ▼
Spring	500	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	0	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	Full Time ▼
Summer2	0	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	0	0.00	<input type="radio"/> Served <input checked="" type="radio"/> UNServed	Not Enrolled ▼

[Update](#) [Cancel](#)

REQUESTING REIMBURSEMENT

- Select the students for reimbursement, by term.
- Check your available balance and selected amount.

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CSAW Current Academic Year: **2010-2011**
 Current Institution: **Pacific Lutheran University** [change](#)

[Upload](#) [Address Edits](#) [Submit for Reimbursement](#) [Search/Add](#) [Tools](#)

268 unsubmitted awards for 143 awards selected

Available Balance: \$152,487.13
 Total Selected Amount: \$47,533.00
 Total Unsubmitted Amount: \$154,488.00

search for students by name

<input type="checkbox"/>	Name	Award Amount	Amt to Reimburse	Enrollment
<input type="checkbox"/>	Allen, Dick (xxx-xx-1234)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Angelo, Brad (xxx-xx-5343)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Bohr, Nathan (xxx-xx-8375)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	DeVaney, Mike (xxx-xx-1574)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Hall, Bobby (xxx-xx-3568)	\$3,463	\$3,463	Full Time
<input checked="" type="checkbox"/>	Kulick, Kelly (xxx-xx-1024)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Malott, Wes (xxx-xx-2048)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	McCune, Eugene (xxx-xx-4096)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Nolen, John (xxx-xx-8192)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Norton, Scott (xxx-xx-6384)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Scroggins, Mike (xxx-xx-2768)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Smallwood, Tom (xxx-xx-5536)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Waliczek, Lonnie (xxx-xx-1072)	\$3,463	\$3,463	Full Time
<input type="checkbox"/>	Bouganville, Fred (xxx-xx-1234)	\$3,463	\$3,463	Full Time

- Publics will have a ‘Submit Interim Report’ screen instead of a reimbursement screen.
- The process to request cash for the publics remains unchanged.
- Fund management tools, such as the summary of account status and financial transaction report, are still available for SNG.

CSAW REPORTS MENU

- Three tabs to perform different kinds of searches.
- Canned reports will vary depending on sector.
- Publics can now add new student to interim before submission.

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CSAW Current Academic Year: **2010-2011**
Current Institution: **Pacific Lutheran University** [change](#)

[Upload](#) [Address Edits](#) [Submit for Reimbursement](#) **[Search/Add](#)** [Tools](#)

Reports Multiple Targeted [+ Add New Student](#)

Institution
Academic Year

[Awards that have adjustments](#)
[Awards that have been canceled](#)
[Served awards that have been reimbursed](#)
[Served awards that have not been reimbursed](#)
[Students with unserved awards](#)
[Students that have less than 1.5 QER](#)
[Students that are in repayment status](#)

[Students with a DCA award attached](#)
[Students with less than half time awards](#)

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CSAW Current Academic Year: **2010-2011**
Current Institution: **Pacific Lutheran University** [change](#)

[Upload](#) [Address Edits](#) [Submit for Reimbursement](#) **[Search/Add](#)** [Tools](#)

Reports Multiple Targeted [+ Add New Student](#)

Institution
Academic Year
SubProgram
Term
Warrant/EFT #
School Code
SSN or ID
Name
last first
Served



SNG REMINDERS

- Eligible **foster youth** are guaranteed SNG funds. If school reserves are depleted*, contact the HECB.
**Schools should process with regular SNG population*
- **Retain SNG award documentation** for six years.
- **LTHT reserves are no longer separate** from SNG reserves.
- SNG **repayments** need to be **calculated separately** from federal repayment calculations.
- Report **all eligible** students on interim reports. Make sure lists are vetted before reporting.



SUMMER SNG TIMELINES

- **June - Initial reserve notifications**
 - (Initial 2011-2012 funds will be committed)
- **July 8 - Reconciliation of 2010-2011 academic year begins**
- **August (end of month) - Finalized reserve notifications**
 - (100% of 2011-2012 funds committed)

Note: Updated archive becomes available after reconciliation process is completed for [all](#) schools.

SNG REPORTS FOR 2011-2012

Record Layouts are online at

<http://portal/default.aspx/Common/Messages%20And%20Files/default.aspx>

Report Due Dates

Fall	November 4, 2011
Winter	February 3, 2012
Spring	May 11, 2012
Recon	July 6, 2012



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