

State of Wisconsin Higher Educational Aids Board

131 West Wilson Street, Madison, Wisconsin

Post Office Box 7885 Phone: (608) 267-2206

Madison, WI 53707-7885 Fax: (608) 267-2808

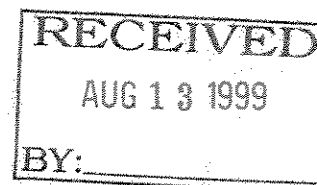
E-Mail: HEABmail@heab.state.wi.us

Web Page: <http://heab.state.wi.us>

Tommy G. Thompson
Governor

Jane M. Hojan-Clark
Executive Secretary

August 6, 1999



Senator Brian Burke
316 South
State Capitol
Madison, WI 53708

Dear Senator Burke,

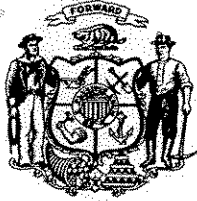
As provided in s. 227.24, Stats., there is hereby submitted a copy of ch. HEA 11, administrative rules relating to the Minority Teacher Loan Program. I have also enclosed a fiscal estimate related to the implementation of the emergency rules. These rules and fiscal estimate along with the statement of emergency finding are also being submitted to all other legislators and the chief clerk of each house of the legislature.

If you have questions regarding the enclosed documents, please feel free to call me at (608)264.6181 or send email to jane.hojan-clark@heab.state.wi.us.

Sincerely,

Jane Hojan-Clark
Executive Secretary

Enclosures



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FINDING OF EMERGENCY

The Higher Educational Aids Board (HEAB) finds that an emergency exists and that the attached rule is necessary for the immediate preservation of the public peace, health, safety or welfare. A statement of the facts constituting the emergency is:

The 1989 Wisconsin Act 31 created s. 39.40, Stats., which provides for loans to minority students enrolled in programs of study leading to licensure as a teacher. The Wisconsin Higher Educational Aids Board (HEAB) administers this loan program under s. 39.40 and under ch. HEA 11. Current rules require that a student be enrolled full time and show financial need to be considered for participation in the Minority Teacher Loan Program. Students who did not enroll full time and did not show financial need were allowed to participate in the program in the past when part of the program was administered by another administrative body. These students are enrolled in teacher education programs that train teachers specifically for the school districts named in the statutes that outline the intent of the Minority Teacher Loan Program. Unless the Board changes its rules, many participating students will lose their eligibility in the program. This will cause a hardship to those students who relied on the interpretation of the prior system administration. Revising the rules would allow students who participated in the program in the past to continue to participate. The proposed revision will not affect expenditures of State funds for the Minority Teacher Loan Program.

Statutory Authority: Section 39.28 (1), Stat., as created by 1971 c. 125, and section 227.11 (2), Stats.

Section HEA 11.03 is amended to read:

Section 1. Section HEA 11.03 (3) is amended to read:

(3) The borrower shall be enrolled ~~full time~~ at least half time in an eligible institution in the junior or senior year of a bachelor degree program majoring in education.

Section 2. Section HEA 11.03 (5) is created to read:

(5) The borrower shall not be required to show financial need.

Effective Date

These rules shall take effect upon publication as provided in s. 227.24 (d) Stats.

FISCAL ESTIMATE FORM

1999 Session

- ORIGINAL
- CORRECTED
- UPDATED
- SUPPLEMENTAL

LRB #

INTRODUCTION #

Admin. Rule #

Subject
Change in Minority Teacher Loan Program eligibility.

Fiscal Effect

State: No State Fiscal Effect

Check columns below only if bill makes a direct appropriation or affects a sum sufficient appropriation.

- Increase Existing Appropriation
- Decrease Existing Appropriation
- Create New Appropriation
- Increase Existing Revenues
- Decrease Existing Revenues

Increase Costs - May be possible to Absorb Within Agency's Budget Yes No

Decrease Costs

Local: No local government costs

- 1. Increase Costs
 - Permissive
 - Mandatory
- 2. Decrease Costs
 - Permissive
 - Mandatory

- 3. Increase Revenues
 - Permissive
 - Mandatory
- 4. Decrease Revenues
 - Permissive
 - Mandatory

5. Types of Local Governmental Units Affected:
- Towns
 - Villages
 - Cities
 - Counties
 - Others _____
 - School Districts
 - WTCS Districts

Fund Sources Affected

- GPR
- FED
- PRO
- PRS
- SEG
- SEG-S

Affected Ch. 20 Appropriations

Assumptions Used in Arriving at Fiscal Estimate:

This rulemaking order expands program eligibility to allow students who were eligible to participate under this program in the past, when it was administered by a different system, to continue to be eligible to participate in the future.

No fiscal effect is expected.

Long-Range Fiscal Implications:

Prepared By: / Phone # / Agency Name
Jane Hojan-Clark/4.6181/HEAB

Authorized Signature / Telephone No.

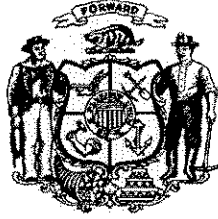
Jane Hojan-Clark 4.6181

Date
8/6/99

THE STATE OF WISCONSIN

SENATE CHAIR
BRIAN BURKE

316-S Capitol
P.O. Box 7882
Madison, WI 53707-7882
Phone: (608) 266-8535



ASSEMBLY CHAIR
JOHN GARD

315-N Capitol
P.O. Box 8952
Madison, WI 53708-8952
Phone: (608) 266-2343

JOINT COMMITTEE ON FINANCE

MEMORANDUM

To: Members
Joint Committee on Finance

From: Senator Brian Burke
Representative John Gard
Co-Chairs, Joint Committee on Finance

Date: August 2, 2000

Re: Annual Status Report for the Academic Excellence Scholarship Program

Enclosed please find a copy of the 1999-2000 Annual Status Report for the Academic Excellence Scholarship (AES) Program. Pursuant to s. 39.41(7), the Higher Educational Aids Board is required to submit a report evaluating the success of the AES Program annually to the Joint Committee on Finance by August 1 of each calendar year.

This information is for your review only. No action is required by the Committee.

BB:JG:js



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Tommy G. Thompson
Governor

Jane M. Hojan-Clark
Executive Secretary

July 31, 2000

The Honorable Brian Burke, Co-Chair
Joint Committee on Finance
State Capitol, Room 316S
Madison, WI 53701

The Honorable John Gard, Co-Chair
Joint Committee on Finance
State Capitol, Room 315N
Madison, WI 53701

Dear Senator Burke and Representative Gard:

Enclosed is the 1999-2000 Annual Status Report for the Academic Excellence Scholarship (AES) Program. Submission of this report is in compliance with Section 39.41(7) of the Wisconsin Statutes which requires a yearly report regarding the AES Program be developed and provided to the Joint Committee on Finance. In addition to presenting final 1999-2000 data, preliminary data is included for the freshmen who will enroll during the 2000-2001 academic year as the 11th class of scholars since the inception of the program.

If you have any questions about this report or about the AES Program, please feel free to contact me by phone at 264-6181 or by e-mail at jane.hojan-clark@heab.state.wi.us.

Sincerely,

A handwritten signature in cursive script that reads "Jane Hojan-Clark".

Jane Hojan-Clark
Executive Secretary

Cc: Members of the Joint Committee on Finance
Legislative Fiscal Bureau
Department of Administration

1999-2000
ACADEMIC EXCELLENCE SCHOLARSHIP PROGRAM
Annual Status Report

1999-2000 was the fourth year that the \$2,250 cap was placed on the Academic Excellence Scholarship (AES) freshmen recipients. There were 736 freshmen scholars under this cap requirement utilizing \$802,587 of the program's funds. In 1998-1999, 704 freshmen scholars required \$784,054 to fund their scholarships. The award cap was initiated to control spending. Now that all four classes, freshmen through seniors, have a tuition cap tied to their scholarship; spending in this program has stabilized. Cost per freshman was \$1,114 in 1998-1999. In 1999-2000, cost per freshman was \$1,090. We must continue to give attention to any possible trends that reflect that the cap is discouraging students from using the scholarship.

Criteria described in the statute for alternate students was modified, effective for the 2000-2001 academic year. Previously, a student could be considered an alternate only if he or she had the same cumulative grade point average (GPA) as the student(s) designated as recipients of the scholarship. The modification to the statute allows for the naming of a student with the next highest cumulative GPA as an alternate, if the high school uses a weighted grading system. As of July 15, 2000 there are nine more scholars named as alternates for the 2000-2001 academic year than there were at the end of the 1999-2000 academic year.

Seven tables are attached showing final figures for 1999-2000 along with preliminary data for 2000-2001.

- Tables I, II, III present enrollment information by sector (University of Wisconsin, Wisconsin Technical College, and Wisconsin Independent Colleges and Universities.) These figures represent the students who received AES Program funds.
- Tables IV and V present financial need related information by sector. The average contribution and adjusted gross income (AGI) figures are for AES Program recipients who also received other State of Wisconsin funded financial assistance (Wisconsin Higher Education Grant, Wisconsin Tuition Grant, Talent Incentive Program Grant, and Wisconsin Indian Grant.) The figures in the HEAB AES Amount column are the scholarship funds administered by HEAB. This amount is matched by the school that the student attends in order to fully fund the scholarship award.
- Table VI presents general information such as the number of scholars using their award to attend a Wisconsin college or university.
- Table VII gives preliminary information for 2000-01 freshmen.

Table I						
ACADEMIC EXCELLENCE SCHOLARS						
UNIVERSITY OF WISCONSIN INSTITUTIONS						
1999-2000 ACADEMIC YEAR						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Madison	340	356	347	323	1366	1,489,657.50
Milwaukee	27	28	25	28	108	97,304.45
Green Bay	22	18	10	12	62	50,288.00
Parkside	6	5	3	4	18	20,250.10
Colleges	12	10			22	18,771.93
Eau Claire	34	42	34	37	147	143,148.50
La Crosse	33	43	27	29	132	142,875.00
Oshkosh	16	13	10	13	52	47,270.00
Platteville	26	25	22	26	99	89,253.50
River Falls	17	6	8	19	50	54,000.00
Stevens Point	34	21	31	20	106	102,937.50
Stout	10	9	8	7	34	35,326.20
Superior	2	1	2	2	7	7,875.00
Whitewater	15	13	15	24	67	73,508.04
UW Total	594	590	542	544	2270	2,372,465.72

Table II						
ACADEMIC EXCELLENCE SCHOLARS						
WISCONSIN TECHNICAL COLLEGES						
1999-2000 ACADEMIC YEAR						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Western Wisconsin		2	1		3	2,829.47
Milwaukee Area	2	1	1		4	3,861.66
North Central	1				1	563.00
Mid-State	3				3	543.45
WI Indianhead	1	2			3	2,329.60
WTCS Total	7	5	2		14	10,127.18

UW & WTCS Total	601	595	544	544	2284	2,382,592.80
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Note: Tables I and II show actual net spent amounts and the scholars with those net spent amounts.

Table III						
ACADEMIC EXCELLENCE SCHOLARS						
INDEPENDENT COLLEGES AND UNIVERSITIES						
1999-2000 ACADEMIC YEAR						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Alverno	2	1			3	3,378.00
Beloit	3	1	2	3	9	10,125.00
Cardinal Stritch	1	2		1	4	3,938.00
Carroll	12	9	8	9	38	38,548.00
Carthage	3	4	1	4	12	13501.00
Edgewood	1		1		2	2,250.00
Lakeland	2	3		2	7	3,938.00
Lawrence	8	11	10	22	51	56,438.00
Marian	1	2	2	1	6	5,625.00
Marquette	46	29	23	32	130	140051.75
MSOE	10	9	5	8	32	35,073.00
Mount Mary	2	1			3	3,375.00
Mount Senario		1			1	562.00
Northland			1		1	1,125.00
Ripon	11	5	4	6	26	28,125.00
St Norbert	12	14	14	18	58	63,002.00
Viterbo	7	1	5	4	17	18,369.75
Concordia	4	1	4	1	10	11,250.00
WI Lutheran	4	3	2	4	13	14,063.00
Maranatha Baptist	4	2	2	2	10	9,219.00
Bellin	2		2		4	2,250.00
Independent Totals	135	99	86	117	437	464,206.50
Grand Total UW-WTCS-Indep.	736	694	630	661	2721	2,846,799.40

Note: Table III shows actual net spent amounts and the scholars with those net spent amounts.

Table IV							
ACADEMIC EXCELLENCE SCHOLARS RECEIVING STATE GRANTS							
UNIVERSITY OF WISCONSIN AND WISCONSIN TECHNICAL COLLEGE INSTITUTIONS							
1999-2000 ACADEMIC YEAR							
	Total Scholars	Applied for Aid	State Aid Eligible	Average Contribution	Average AGI	State Aid Amount	HEAB AES Amount
Madison	1,367	561	60	524	17,294	70,112	1,537,100
Milwaukee	95	49	7	152	15,860	9,889	103,492
Green Bay	52	23	4	464	15,278	4,153	52,538
Parkside	18	8	1	1,085	5,950	425	20,250
Colleges	20	0	0	NA	NA	0	20,814
Eau Claire	135	74	7	455	12,765	7,692	147,649
LaCrosse	135	76	12	374	32,969	13,356	150,931
Oshkosh	46	22	4	721	23,730	4,282	49,123
Platteville	89	49	1	443	32,822	1,067	96,004
River Falls	51	31	4	307	11,678	4,935	57,375
Stevens Point	97	49	10	427	21,184	11,105	106,875
Stout	34	21	4	446	18,731	3,895	37,014
Superior	7	5	0	NA	NA	0	7,875
Whitewater	66	34	5	359	19,079	6,727	74,633
UW Total	2,212	1,002	119	466	18,969	137,638	2,461,673
WTCS Total	16	7	2	296	31,391	2,009	17,438
Grand Total UW & WTCS	2,228	1,009	121	464	19,174	139,647	2,479,111

Notes: Table IV shows scholars and amounts awarded.

The final column is the amount of AES that HEAB provided. The institutions matched this amount to fully fund the scholars.

Table V							
ACADEMIC EXCELLENCE SCHOLARS RECEIVING STATE GRANTS							
INDEPENDENT COLLEGES AND UNIVERSITIES							
1999-2000 ACADEMIC YEAR							
	Total Scholars	Applied for Aid	State Aid Eligible	Average Contribution	Average AGI	State Aid Amount	HEAB AES Amount
Alverno	4	0	0	NA	NA	0	4,500
Beloit	9	9	7	2,418	33,633	16,100	10,125
Cardinal Stritch	4	4	1	3,643	46,254	2,300	4,500
Carroll	35	32	19	3,270	37,649	45,029	37,688
Carthage	13	6	6	1,743	31,762	13,800	14,625
Edgewood	2	1	1	1,750	17,745	2,300	2,250
Lakeland	4	2	0	NA	NA	0	3,938
Lawrence	53	46	33	3,660	48,687	75,900	57,377
Marian	5	5	2	3,017	48,710	4,600	5,625
Marquette	136	105	51	3,868	42,291	114,875	158,401
MSOE	31	26	17	4,345	37,034	43,980	34,875
Mount Mary	3	3	1	3,823	29,065	2,300	3,375
Mount Senario	1	1	1	1,717	36,898	1,621	1,125
Northland	1	1	1	1,960	32,571	2,300	1,125
Ripon	26	22	16	3,919	44,134	36,800	29,250
St. Norbert	58	26	26	3,277	39,369	63,793	65,250
Viterbo	16	14	8	3,605	40,042	16,531	17,809
Concordia	11	7	4	4,598	48,831	7,429	12,375
WI Lutheran	13	8	3	3,192	43,417	5,750	14,625
Maranatha Baptist	9	6	4	2,643	32,759	3,821	10,125
Bellin	2	1	2	3,102	55,686	2,108	2,250
Total	436	326	202	35,581	41,370	461,337	491,213

Grand Total UW-WTCS-Indep.	2,664	1,335	323	2,399	33,055	600,984	2,970,324
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Notes: Table V shows scholars and amounts awarded.

The final column is the amount of AES that HEAB provided. The institutions matched this amount to fully fund the scholars.

Table VI				
General Scholar Data				
	1996-97	1997-98	1998-99	1999-00
Total Scholarships Available	3197	3244	3294	3324
Total Scholars Enrolled In-State	2484	2496	2586	2723
Total Freshman Scholarships Available	812	827	838	847
Scholars Enrolled as Freshmen	698	671	697	699
Alternate Scholarship Recipients	55	59	75	69
% of Eligible Freshmen Enrolled In-State	86%	81%	83%	83%

Table VII	
Preliminary Data – 2000-2001 Freshman Scholars as of July 15, 2000	
Total Scholarships Available	860
Alternate Scholarships (of 860 Available Scholarships)	78
Total Scholars Enrolled in Wisconsin Institutions	607
Percentage of Scholars Enrolled in Wisconsin Institutions	71%
Scholars Enrolled in UW System Institutions	504
Scholars Enrolled in Independent Colleges	98
Scholars Enrolled in WTCS Institutions	5
Scholars Enrolled in Non-Wisconsin Institutions	142
Scholars Who Have Not Yet Specified Which College	189