



NYSFAAA Executive Council
June 18-19, 2018
Marriott Syracuse Downtown, Syracuse, NY

Call to Order & Roll Call

President – Darrin Rooker

President Elect – Howard Leslie

1st VP – Adrienne King

2nd VP – Howard Leslie

Secretary – Kelly Kelly

Treasurer – Robert Zasso

Treasurer Elect – Susan Godreau

Region 1 – Kathy Michalski

Region 2 – Shalena Clary

Region 3 – Patti Donahue

Region 4 – Michelle Fountaine

Region 5 – Joseph Weglarz

Region 6 – Ajana Wilkinson

Region 7 – Debra Evans

Region 8 – Stacey Hawkins

Guests: Gina Soliz – Conference 2018

Kathy Flaherty – Conference 2018

Tami Gilbeaux – Conference 2018

Anne Sullivan – Secretary Elect

Brian Smith – 2nd VP Elect

Lisa Simpson - HESC

Discussion via Email-prior to meeting

MOTION: A motion was made by Howard Leslie, seconded by Kathy Michalski to cancel/postpone the Leadership Symposium and inform the 3 presenters and the hotel as soon as possible.

Discussion followed where the following points were made:

- Unfortunately, schools budgets are becoming tighter and people now have to choose what training events to attend. It is a shame that we may have to postpone/cancel this event, it is a great symposium. Agree that we should cancel/postpone the symposium before we incur any costs to the organization.
- Timing of when information about having the training was off- we submit our requests for professional development in the spring for the following school year, so monies had all been allocated long before we even knew this was a possibility. May be the case for many- timing and/or tight squeezes on the budget. Agree that it is a shame that we did not get enough

registrants as the agenda looks great and know there has been a lot of hard work that has gone into the planning.

- Noticed in NASFAA news today that the Western association (WASFAA?) has this type of training in conjunction with their novice level training. It is too late to make similar arrangements for this year, but perhaps we could consider the combination of our novice and Leadership training for next year, and giving time to include budget requests for 2019.
- The cancellation should only be for the cost of the conference not for the 2018-2019 Membership that was included in the costs, correct?
- Funding to allow staff to attend has become more and more limited. I too feel sad that we have to cancel this event. I know a lot of hard work and time has been put into making this a great symposium.
- Think we have to give them the choice. Don't think it is right to keep the membership fees if the only reason they were becoming members was to attend the training. As much as we would love to have them as members, I think we have to give them the choice for a full refund or partial refund and they remain members.
- Sad that what would have been a wonderful event has to be canceled. Could we possibly have Novice and the Leadership Symposium at the same time? So we would essentially be offering a track for Novices and one for Leaders. Would intermediate folks want to spend 2-3 days in dorms? Or would we have them stay at a nearby hotel? Another thought considered was to have it at another time.
- Don't know if the option of a partial refund is in the hands of the administrators or would they run into flack from administration on how the school's money is spent? If our school paid for a training and it was cancelled they would expect a full refund of the amount paid, even if part of it was for a membership fee.
- As for tacking this conference onto Novice, would it be for every year or every other? Also would we need to expand staffing for volunteers to be able to run both trainings at the same time?
- Agree in that we should give them the option as to if they wish to have the full conference fee and membership returned or just the conference fee. It would be great to possibly tie it in with Novice training however not sure that it would happen this year but something to think about going forward.

AMMENDMENT TO MOTION: A motion was made to cancel/postpone the Leadership Symposium, and inform the 3 presenters and the hotel as soon as possible, and offer the Registrants the option of a full refund including membership fee (\$260.00) or just a symposium fee refund not including the \$40.00 membership fee (\$220.00). There was no further discussion. A vote was called-the motion passed with a quorum in favor of the motion.

Update per Darrin-Calling an Audible and telling the symposium committee to refund the full payment back to whomever made the payment. The committee will still contact each registrant and explain what is being done to return the full payment.

Darrin Rooker called the meeting to order at 12:30 with a quorum of Executive Council present.

Approval of Minutes:

MOTION: A motion was made by Kelly Kelly, seconded by Howard Leslie to approve the minutes from the April 17, 2018 meeting. There was no discussion. A vote was called-the motion passed with a quorum in favor of the motion.

Conference 2018

- Dates: October 22-25 (Monday-Thursday)
- Rooms have been blocked starting on Sunday
- Monday, October 22nd
 - Executive Council meeting from 9-5
- Tuesday, October 23rd
 - Registration opens at 8am
 - Vendor setup begins and opens around 11
 - Grad symposium from 8:30-11:30
 - Guidance counselor workshop from 8:00-12:00
 - Conference kickoff at noon with Mayor to speak
 - Breakout sessions – working out layout of rooms
 - Raffle table, registration table, vendors, breaks on fingerlake level
 - Happy hour from 5:00-6:00 with one complementary drink ticket
 - Evening on your own with a shuttle bus to Destiny Mall
- Wednesday, October 24th
 - Breakfast
 - Working on EASFAAA and NASFAAA updates – general sessions
 - Breakout sessions
 - Vendors open
 - President reception
 - Evening gala on the grand ballroom floor
 - Award ceremony will be spread throughout the conference (not just all at one time)
- Thursday, October 25th
 - NYSFAAA business meeting
 - Breakout sessions
 - Possibility of a general session
 - Federal update
- Working on conference app – cost is a factor – sponsorship?
- Conference committee requesting EC to review vendor sponsorship
 - Discussion took place on the following:
 - Sponsorship specifically for the app?
 - Get sponsorship and limit it to conference and conference app
 - Limit to non lenders

MOTION: A motion was made by Howard Leslie, seconded by Rob Zasso to allow sponsorship of 50th anniversary conference agenda app by a non lender vendors and sponsorship only be reflected in the app itself.

A vote was called with 7 in favor, 3 oppositions, and 1 abstention. The motion passed with a quorum in favor of the motion.

President's Report – Darrin Rooker

- EASFAA Report
 - May 2018 conference located at the Sagamore – great facility
 - Approximately 200 attendees
 - \$10,000 donated to Puerto Rico for the hurricane relief
 - Next conference is May 5-8 2019 in Portland, Maine
 - Attended board meeting
 - Emphasis on training
 - Multiple committees
 - Webinar series – Tuesdays at Two
 - Working on strategic plan
 - Webinar soon on institutional membership (\$300.00 for 5 or more members and \$60.00 for individual fee)
- State Ed. TAP taskforce
 - Forwarded Exec. Council's comments on meeting follow up questions to State Ed.
 - Issues being worked on: definition of program of study, out of state transcripts, ATB tests
 - Comments being compiled at State Ed. and will then meet again
 - Continue to think about these issues – they look at NYSFAAA for comments and input
- Other updates...what has the President been up to?
 - April 18th – SUNYFAP
 - April 27th – Attended Region 1 & 2 joint meeting
 - June 7th & 8th – Attended Novice training at Mercy College
 - Stayed for graduation
 - June 15th – Attended Region 8 meeting
 - July 12th – Will attend Region 6 meeting
 - July – HESC board meeting (no date set yet)

President Elect Report (Second Vice President) – Howard Leslie

- TICC
 - A link has been established on the NYSFAAA homepage for conference session proposals -there is an instructional video
 - ATAC has linked the two most recent EmpireChat posts to the Hot News portion of the NYSFAAA home page-Howard Leslie has solicited blog contributors to keep this feature fresh-He has urged members to watch for posts
 - TICC members have volunteered to review and forward edits of submenu pages to Ideta Daniel for updating
 - A social media survey was sent out-closing date is June 14th
 - TICC budget proposal was submitted
 - Items we currently working on:

- IN PROGRESS: Suggesting a policy for Executive Council regarding who and how the website is to receive updates to keep the content fresh including updated membership on committees, regional activities, and meeting notes
 - IN PROGRESS: Creating step-by-step on how to send surveys to only participants of events- Follow up notification would only go to those who had not responded yet
 - Reviewing requirements on how to do Podcasts via GoToMeeting
 - Reviewing options for other webinar software options
 - Reviewing requirements regarding ADA and our website
 - The idea of regional splash pages is placed on hold at this time
 - Various updates to content and links on the NYSFAAA website
 - Reviewing ways to promote membership benefits
- Statewide Training
 - Howard Leslie has been running SWT for the last 10 years-this is his sign off
 - The committee is being left in the capable hands of Lynn and Mark with Brian now coming in as 2nd VP
 - Mark and Lynn have had their first committee meeting planning for 18-19.
 - As far as 17-18 is concerned, SWT has delivered 12 webinars to date with one more, hopefully, to come. Data privacy has been postponed several times due to the department being unable to come to terms with how to present the new law. If June 20th does not work it will be canceled – not postponed.
 - Live attendees (counting groups) = 3511
 - Watched recording (groups not estimated) = 3601
 - Total = 7112
- Elections
 - Adrienne King will continue as 1st VP
 - Anne Sullivan – new Secretary
 - Brian Smith – new 2nd VP

MOTION: A motion was made by Howard Leslie, seconded by Deb Evans to have the ballots destroyed. There was no discussion. The motion passed with all in favor, no oppositions, and no abstentions.

First Vice President's Report – Adrienne King
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- Regional Representatives
 - Region 1
 - Region 2 Deidre Strutz
 - Region 3 Kevin Schults
 - Region 4 Rochelle Filler
 - Region 5 Cindy Garvey
 - Region 6 Ben Loya
 - Region 7 Patricia Noren
 - Region 8 Patricia Farmer

2015-16 Membership	16-17 Membership Goal	6/17/18	% of Goal	2017-18 Goal *as of 6/17/18
Active 1162	1090	1114*		1136 1114
Associate 100	88	90*		100 90
Affiliate 68	50	39*		80 39
Retired 19	21	23*		23 23
Lifetime 8	9	11*		11 11
TOTAL 1357	TOTAL 1258	Total 1277	88%	Total 1350 1277

- NYSFAAA 3 yr. average membership is 1099
- 1277 members have already paid for 2017-18
- 298 NYS institutions have current members
- 2017-18 per region breakdown (total is 1394 because some members belong to multiple regions):
 - Region 1 104
 - Region 2 148
 - Region 3 181
 - Region 4 93
 - Region 5 146
 - Region 6 427
 - Region 7 158
 - Region 8 568
 - Not specified 4
 - Not Affiliated with a region 75

MOTION: A motion was made by Adrienne King, seconded by Howard Leslie to accept Goal Solutions as a new member of NYSFAAA as an associate member.

- Reviewed the website www.goalsolutions.com

A vote was called with all in favor, no oppositions, and no abstentions.

- Request was made by Mr, Winston Majette, Harlem Chamber of Commerce to have NYSFAAA represent during the annual Harlem Week Higher Education Fair & Expo
 - August 18, 2018 from 12pm-5pm
 - Volunteers will be recruited from Region VI
- Lucy Villaquiran (region 6) will now be the new chair for the membership committee

Secretary's Report – Kelly Kelly

- School Outreach & Early Awareness

- Committee members remain the same: Patrick Ziegler, Amy Thompson, Lisa Simpson, and Gene Rogers
- Planned for a conference call last month but is now rescheduled for the summer.
- For College Goal NY, requests have been coming in downstate at an increased rate. Long Island expects to have at least five events in Fall 2018-up from four the past few years
- Waiting on news about DOE releasing the FAFSA application and how that may impact these events moving forward
- NYGEARUP partnership
 - Gene and Lisa attended the NYGESRUP conference on April 30th and did a panel presentation on aid topics with other college reps-seemed well received
 - Current GEARUP cohort contains students that will be on entering 11th grade- there is an expectation that NYSFAAA will be asked to assist in a number of GEARUP activities for 18/19 year
- Guidance Counselor Workshops
 - Currently not discussed what plans may be for the upcoming 18/19 year but expect to continue discussion on other options for something similar moving forward

Treasurer's Report – Robert Zasso
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- Treasurer reports distributed for review
- 16/17 Novice income not correctly represented on financial statements-working on it
- Asked rep from Morgan Stanley, Rob Bell, about the market-what is happening with investments-we have low risk invested
- Review of budget requests from committees
- Review of 18/19 budget

MOTION: A motion was made by Rob Zasso, seconded by Howard Leslie to accept the 18/19 budget. A vote was called - the motion passed with a quorum in favor of the motion.

- Region treasurers doing great in getting reports to EC treasurer-really helps when the auditors comes in to review
- Regional funds review
 - Need to review policy of region requests
 - Request for funding-how to and when?
 - Vote on new wording within P&P for region training funding
 - Approve ones submitted not with the current P&P
 - Update P&P and then review
 - UP to region reps to explain the regional budget request results Review had to be done and had to be done in today's meeting
 - Review , update, and changes made to the P&P of regional funds-this can be found in the Manual of Policy and Procedures

MOTION: A motion was made by Kathy Michalski, seconded by Patti Donahue to accept the NYSFAAA Policy and Procedure Manual updated wording presented to Council concerning the regional training funds request process. A vote was called-the motion passed with a quorum in favor of the motion.

HESC Update – Lisa Simpson

- HESC update provided at end of minutes

Old Business

- Novice workshop Update
 - 94 attended
 - Waiting to hear from feedback
 - A lot of people from front line services-not just from financial aid
 - Great location
 - Great group of people-very talented
 - This year added concurrent sessions-able to pick and choose
 - Cut back this year on federal methodology
 - Sessions focused more on professional judgment and verification
 - Manual options (hardcopy/electronic)-priced the same for each option-left it up to the person to pick
- School Counselor Workshop
 - Workshop being held the day before the conference at the hotel
 - Survey went out asking what information they needed-training
 - Get HESC to partner with NYSFAAA to do workshops again
- Policy & Procedure Manual edits – completed
- NYSFAAA Statement of Principles edits – completed
- Conference 2019
 - Region 5 hosting
 - Joe Weglarz and Lisa Simpson are co-chairs of conference
 - Dates: October 28th (Monday) – October 31st (Thursday)
 - Considered various places but narrowed it down to the Desmond in Albany and the Marriott in Albany
 - Desmond: conference center, can handle room requests, very good with price (119/night), no conference space charge
 - Marriott: just renovated, very nice flow, good price (115/night), 2000.00 conference room fee, have to guarantee 70% of room request
 - Discussion on the two hotels-suggestion to do a deal with the hotel for multiple years

MOTION: A motion was made by Adrienne King, seconded by Deb Evans to have the 2019 conference be hosted by Region 5 and the hotel be the Marriott in Albany. A vote was called-the motion passed with a quorum in favor of the motion.

Regional Updates

- Regional reports included in minutes

Future Meetings

- August 15th 2:00-4:00 (remote meeting)
- October 22nd (Marriott Syracuse Downtown, Syracuse, NY)

As there was no further business, a motion was made by Kathy Michalski, seconded by Debra Evans to adjourn the meeting. The meeting was adjourned at 11:40am.

Region 1 Report

NYSFAAA Exec Council Meeting

June 18 & 19, 2018

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: April 27, 2018 at GCC Medina Campus – Joint Meeting with Region II
May 17, 2018 at Medaille College

Attendees: April 27th meeting had 22 attendees
May 17th meeting had 8 attendees

Topics and Training details: Darrin Rooker joined us at the April 27th meeting. Excelsior/ETA, Annual Conference, meeting attendance and how to improve it, training webinars, and membership. May 17th topics: School Counselor Workshops, Officer Elections, training webinars, membership, and future meeting topics.

2 **Other Training events that Region was involved in :** none
Example – CGNY, Guidance Counselor workshop?

3 **Treasury update:** \$6108.53

4 **Committee Reports:** none

5 **Conference news (If your region is involved in Conference planning):** none

6 **Upcoming meetings and events:** June 21st

7 **Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council):** none

Region 2 Report

NYSFAAA Exec Council Meeting

June 18-19, 2018

2. February 23rd- Statewide Training and Region 2 meeting

Date and Location: Robert's Wesleyan

Region 1 and 2 Joint meeting-

April 27th Genesee Community College

22 people in attendance

Round table discussions-

- why aren't more people attending meetings?
- Conference concerns/feedback
- Trainings- limit online trainings to help get people out of office to meetings
- NY State proposal for standardized award letters possibly needing to include loan payoff amounts

8 Other Training events that Region was involved in :

University of Rochester is hosting the North Eastern Association of Student Employment Administration (NEASEA)- having a meeting and they have reached out and invited NYSFAAA members to attend, even if they are not NEASEA members. There are a small handful of NYSFAAA members that are planning on attending.

9 Treasury update: \$3119.59

10 Committee Reports- Support Staff workshop was scheduled for June 14th but was cancelled due to low enrollment

11 Upcoming meetings and events- talking about rescheduling end of year meeting/get together- attendance has been down in the past and money is an issue for the region, so not looking to do anything expensive

12 Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)

Region #3 Report
NYSFAAA Exec Council Meeting
6/15/18

3. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: May 18, 2018 at TC3

Attendees = 16

Topics and Training details: **EC update, EASFAA conference update, updated NYSFAAA website review and feedback, and NYSFAAA 50th Anniversary Conference update**

- 13 **Other Training events that Region was involved in: None**
Example – CGNY, Guidance Counselor workshop?
- 14 **Treasury update: \$5,170.23**
- 15 **Committee Reports None**
- 16 **Conference news (If your region is involved in Conference planning) Gina to provide**
- 17 **Upcoming meetings and events – next Region 3 meeting will be in Oswego in Sept/Oct (right before the conference)**
- 18 **Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council) NONE**

Region IV Report

NYSFAAA Exec Council Meeting

June 12, 2018

4. **Meetings:** February 2018. Statewide Training event at Empire State College. We had breakfast and then viewed the Post-Secondary Institution Data-Security Overview and Requirements training together. We also provided lunch. We had 23 members in attendance
- 19 **Other Training events that Region was involved in:** College Goal participation
- 20 **Treasury update:** \$6952.94 account balance
- 21 **Committee Reports:** Membership: 93 Associate, Affiliate, Retired and Life Member; 83 active.
- 22 **Conference news:** None
- 23 **Upcoming meetings and events:** None scheduled at this time.
- 24 **Regional comments/Recommendations:**
 - a. Strategic Long Range Plan goals:
 - i. **ADVOCACY:** We would like to increase advocacy efforts of Region IV members due to our location. Over the next year we would like to continue to incorporate guests from state legislature, SED, OSC and HESC into our meetings in order to strengthen our relationships with those agencies.
 - ii. **LEADERSHIP and DEVELOPMENT:** Over the next year we will encourage other members to attend Executive Council meetings so that they can have an opportunity to learn more about NYSFAAA. This will provide a targeted mentoring opportunity for those who may be interested in becoming future leaders within NYSFAAA.

Region 5 Report

NYSFAAA Exec Council Meeting

Date

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: TBA

Attendees = ##

Topics and Training details:

2. Other Training events that Region was involved in :

2018 Novice Training was held at Mercy College (Dobbs Ferry, NY) and several Region 5 schools were represented: Mercy College, Culinary Institute of America, Pace University, Sarah Lawrence College, The College of Westchester, and Concordia College.

3. Treasury update: Unavailable

4. Committee Reports

5. Conference news (If your region is involved in Conference planning)

6. Upcoming meetings and events

7. Regional comments/ Recommendations (If your region has a pressing issue that needs to be brought to the attention of Council)

Region #VI Report
NYSFAAA Exec Council Meeting
June 18 & 19, 2018

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING - N/A

- a. Date and Location:
- b. Attendees = ##
- c. Topics and Training details:

2. Other Training events that Region was involved in :

Example – CGNY, Guidance Counselor workshop? N/A

3. Treasury update: \$8625.42

4. Committee Reports – N/A

5. Conference news (If your region is involved in Conference planning) – N/A

6. Upcoming meetings and events – Summer Outing - 7/12/18

7. Regional comments/Recommendations (If your region has a pressing issues that needs to be brought to the attention of Council)

I went to Citibank this morning because we are being charged a monthly fee of \$30.00 because we don't have \$10,000 in the account. The only option Citibank offered was changing it to a minimum balance of \$5000 with a monthly fee of \$15.00 per month. That being said, we will need to keep the balance of \$5000 to avoid getting charged \$15.00 per month. Can we switch banks? This may need to be approved by Executive Council. Would you ask Executive Council, if it would be possible to close the Citibank account and switch to TD Bank? Citibank is a bit too costly, and I believe TD Bank is more economical.

Region #8 Report

NYSFAAA Exec Council Meeting

Date: 6-19-2018

5. MEETINGS SINCE LAST EXEC COUNCIL MEETING:

Date and Location: 6/15/2018- Jefferson Community College

Attendees: 12

Topics and Training details:

- Data Sharing/Privacy presentation provided by NYSFAAA President Darrin Rooker
- Where we are at with the Perkins loan extension and advocacy.
- Noticing a decrease in the number of EOP students and what we can do to help promote

6. Other Training events that Region was involved in : Example – CGNY, Guidance Counselor workshop?

N/A

7. **Treasury update:** Official treasure report was not available as of 2/23/2018 balance was \$3497.39 and a payout was made for around 170.00 so the balance is roughly \$3327.39.

8. **Committee Reports:** No Committee Reports

9. **Conference news (If your region is involved in Conference planning):** N/A

10. **Upcoming meetings and events:** We are working on setting up a Support Staff Workshop for the fall dependent on possible funding. Future meetings anticipated September 2018, November 2018, February 2019, and June 2019.

11. **Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)** We did discuss on the State level the possibility to provide a webinar type training for Guidance Counselors and CBO (Community Based Organizations) that are assisting students and families in completing the FAFSA.



Higher Education Services Corporation

ANDREW M. CUOMO
Governor

HESC Update June 2018

2016-17 TAP Close Out Remittance Advice & Payment Documents

Remittance Advice and Payment documents for the 2016-17 academic year are available for viewing, printing and downloading on HESCWeb.

Certification transactions can no longer be submitted on HESCWeb or by electronic file. Certifications must be emailed to payments@hesc.ny.gov.

The 2016-17 academic year will be closed-out on June 15, 2018. **No student certifications resulting in award payments will be accepted after this date.** Only decertifications will be accepted after June 15, 2018 and these must be emailed to payments@hesc.ny.gov.

Direct questions concerning the certification process to payments@hesc.ny.gov.

2018-19 New York State Budget Highlights

Building on seven years of support for higher education, the recently approved 2018-19 New York State Budget invests \$1.2 billion for strategic programs to make college more affordable and encourage the best and brightest students to build their future in New York.

The following provides highlights from the 2018-19 State Budget pertaining to higher education.

Excelsior Scholarship Program

For the 2018-19 academic year, the Excelsior Scholarship income eligibility threshold will increase, allowing New Yorkers with household incomes up to \$110,000 to be eligible. To continue this landmark program, the Budget includes \$118 million to support an estimated 27,000 students in the Excelsior program. Along with other sources of tuition assistance, including the generous New York State Tuition Assistance Program, the Excelsior Scholarship will allow approximately 53 percent of full-time SUNY and CUNY in-state students, or more than 210,000 New York residents, to attend college tuition-free when fully phased in.

Enhanced Tuition Awards Program

The Budget includes \$22.9 million for the second phase of the Enhanced Tuition Awards program, providing up to \$6,000 in financial assistance including match funds and a tuition freeze to make college more affordable for residents attending private colleges in New York. For the 2018-19 academic year and thereafter, the program is modified to both serve students attending any in-state degree granting private college, and provide more flexibility in the matching requirement for colleges - including the exemption of colleges whose tuition rates are reduced by more than 15 percent from the rate charged six years prior, and permitting the use of existing institutional aid as the college match.

Appeals

The 2018-19 State Budget newly permits the use of prior year income to establish income eligibility for the Excelsior Scholarship program in the event of the death, disability, divorce or separation of a household member whose income is used in determining program eligibility. Students whose current income or prior year adjusted gross income is \$110,000 or below due to these circumstances may appeal their disqualification by completing the Income Appeal Form and submitting it to Income.Appeals@hesc.ny.gov.

Students who are determined to be ineligible for failure to meet the annual credit or continuous enrollment requirements and who can demonstrate good cause may appeal the decision by completing and submitting the Excelsior Scholarship Program Appeal Form to Excelsior.Appeals@hesc.ny.gov.

New York State Science, Technology, Engineering and Mathematics (STEM) Incentive Scholarship Program

The Budget provides \$4 million over four years to expand the STEM Incentive Scholarship Program to students attending a private, degree-granting college in New York State. Recipients will be selected by lottery, and will receive awards up to SUNY resident undergraduate tuition or actual tuition, whichever is less.

- Recipients with more than one STEM- approved major
- Students attending private colleges now eligible
- Updated enrollment requirements for final year of study

NYS Teacher Loan Forgiveness Program

The 2018-19 Budget establishes the New York State Teacher Loan Forgiveness Program and commits \$1 million over four years to provide \$5,000 annual awards to teachers serving in high needs school districts or subject areas for which a shortage of teachers exists.

2018-19 Open Application Period

- Excelsior application: March 26 - July 23
- ETA application: April 2 - July 31
- Part-time Scholarship: March 29 - July 27
- Master's in Education: June 1 – July 17
- STEM: October 1 - August 15

Excelsior Scholarship Program and Full-Time Attendance

An Excelsior Scholarship recipient is deemed to be in full-time attendance if he or she is enrolled in at least 12 credits per semester and completes at least 30 combined credits per year (applicable to his/her program[s] of study) following the student's start date, or its equivalent.

As you are aware, students may use "banked" college credits that were earned while a high school student or in another nonmatriculated status to fulfill the annual 30-credit requirement. Students can also meet the full-time attendance requirement as follows:

Students Enrolled in Fewer than 12 Credits Per Semester

The regulations governing the Excelsior Scholarship program authorizes that a recipient may use college credits earned while a high school student or while in another nonmatriculated status towards his/her enrollment in 12 credits per semester.

Students Enrolled in Coursework Not Applicable Towards Their Program of Study

For a recipient who earned college credits toward his or her program(s) of study while in high school or while a nonmatriculated student and who is making satisfactory progress toward timely completion of his or her program(s) of study, and is enrolled in coursework not applicable toward his or her program(s) of study, such coursework outside of his or her program(s) of study shall be considered as contributing toward full-time attendance.

Consequently, when certifying your Excelsior Scholarship recipients, students who meet either of these conditions should be deemed to meet the definition of full-time attendance. The Excelsior Scholarship award amount should be calculated based on the 2016-17 annual tuition rate, but should not exceed the actual tuition charged.

Please contact Excelsior@hesc.ny.gov should you have any questions regarding this guidance.

New York State Part-time Scholarship (PTS) Award Program

New York State Part-time Scholarship (PTS) Award Program provides scholarship awards to students who attend a SUNY or CUNY Community College part-time. Students can receive \$1,500 per semester for up to two years.

A recipient of the PTS Award Program is eligible to receive award payments for up to four consecutive semesters. Current students are eligible to receive an award. Students who are receiving a Part-time TAP award or Aid for Part-time Study (APTS) are eligible for this award.

Eligibility

An applicant must:

- be a resident of NYS and have resided in NYS for 12 continuous months prior to the beginning of the term;
- be a U.S. citizen or eligible non-citizen;
- have graduated from high school in the United States, earned a high school equivalency diploma, or passed a federally approved “Ability to Benefit” test as defined by the Commissioner of the State Education Department;
- be matriculated in an approved undergraduate program at a SUNY or CUNY community college;
 - (schools that offer two year programs are not eligible ie. Canton)
- be enrolled in at least six but less than 12 credits per term;
- maintain a cumulative grade point average of 2.0 or higher;
- be in a non-default status on a student loan made under any NYS or federal education loan program or repayment of any NYS award; and
- be in compliance with the terms of any service condition imposed by a NYS award.

Application:

Students can apply for 2018-19 academic year.

The application opened on March 29, 2018 and closes on July 27, 2018.

Guidance Regarding Full-Time Study for the NYS Science, Technology, Engineering and Mathematics (STEM) Incentive Program

New York State Science, Technology, Engineering and Mathematics (STEM) Incentive Scholarship Program

The STEM Incentive Program regulations define successful completion of a term to mean, among other requirements, the completion of at least 12 credit hours or its equivalent in a course of study leading to an approved undergraduate degree in the field of science, technology, engineering, or mathematics.

Recipients Enrolled in More than One STEM-Approved Major

To satisfy the full-time requirement, recipients who have enrolled in more than one STEM-approved major must successfully complete a combined total of 12 credit hours in their STEM-approved majors. Accordingly, students who complete 12 credit hours applicable to multiple STEM-approved majors should be certified as meeting the full-time eligibility requirements for the STEM Incentive Program.

Schools should take the necessary steps to certify any STEM recipient who was decertified for failure to enroll in 12 credits in his/her primary major since fall 2014.

Recertifying Students Who were Decertified in 2014-15 or 2015-16

To recertify recipients who were decertified for either the 2014-15 or 2015-16 academic years:

1. Complete the [STEM Recertification spreadsheet \(HE9079\)](#).
2. Save the document using the acronym "STEM" and your school name; e.g., "STEMUAlbany.xls"
3. Upload the completed spreadsheet via the HESC secure file transfer process.

Recertifying Students Who were Decertified in 2016-17 or 2017-18

If you are recertifying a recipient for the 2016-17 or the 2017-18 academic year, please use the standard process for submitting certifications (i.e., the HESC system).

Questions

Please contact stem@hesc.ny.gov should you have any questions regarding this guidance.

Final Year of Study

The requirement for a recipient to be enrolled in 12 credits applicable to his or her program(s) of study per semester is waived during the final year of study, as defined in the Commissioner's regulation.

A recipient is deemed to meet the full-time study requirement in his/her last semester if he/she takes at least one course needed to meet his/her graduation requirements and enrolls in at least 12 credits. Additionally, effective December 27, 2017, a recipient is deemed to meet the full-time study requirement in the semester prior to his/her last semester if he/she takes at least six credits needed to meet their graduation requirements and enrolls in at least 12 credits.

Reminder: Get on Your Feet Loan Forgiveness Program

The NYS Get on Your Feet Loan Forgiveness Program provides up to 24 months of federal student loan debt relief to recent NYS college graduates who are participating in a federal income-driven repayment plan whose payments are generally capped at 10 percent of their discretionary income.

Eligibility

An applicant must:

- be a legal resident of NYS and have resided in NYS for 12 continuous months;
- be a U.S. citizen or eligible non-citizen;
- have graduated from a NYS high school or received a NYS high school equivalency diploma;
- have earned an undergraduate degree from a college or university located in NYS in or after December 2014;
- have earned no higher than a bachelor's degree at the time of application;
- apply for this program within two years of receiving an undergraduate degree.

- be enrolled in the federal Income Based Repayment plan at 10% of discretionary income, the Pay as You Earn plan, or the Revised Pay as You Earn plan;
- have a primary work location in NYS, if employed;
- have an adjusted gross income of less than \$50,000;
- be current on all federal or NYS student loans;
- be current on the repayment of any NYS award; and
- be in compliance with the terms of any service condition imposed by a NYS award.

The application is available now and we encourage schools to notify their recent graduates about this opportunity.