

# President's University Budget Task Force Meeting

Friday, October 14, 2011

## Minutes

Present: Tom Darling, Dan Gerlowski, Steven Isberg, Stephen Percy (Convener), Harry Schuckel, Joe Wood, Bill Schnirel, Katrina Meistering.

Absent: John Callahan

The meeting was called to order at 10:07 a.m. by the Convener, Steve Percy.

The Convener acknowledged Bill Schnirel as the newest member of the Task Force. Bill represents the Administration side of University Council. Katrina Meistering, who was appointed to provide staff support for the President's University Budget Task Force, was also acknowledged.

Prior to the meeting, the Convener provided Task Force Members with minutes of the last two meetings via e-mail. Task Force members were asked to review the minutes and provide any comments or feedback to the Convener prior to this meeting. Joe Wood motioned that the minutes from September 28, 2011 be approved, Tom Darling seconded, and the motion was passed unanimously. Harry Schuckel motioned that the minutes from October 7, 2011 be approved, Joe Wood seconded, and the motion was passed unanimously.

A copy of the agenda for the meeting was distributed and an item under 4, labeled 4A, was added regarding the collaborative understanding with the Law School as outlined by the Office of the President on Wednesday, October 12, 2011.

### **Agenda Item: Presentation by Office of Financial Aid**

As per agreement during the last meeting, Miriam King, SVP for Enrollment Management and Student Affairs and Anne Hamill, AVP for Enrollment Services, were asked to attend the meeting to answer questions regarding Financial Aid.

It was acknowledged that the Law School operates differently than the rest of the University when it comes to Financial Aid. The Law School awards scholarships and grants independently, but the funds are then administered through the Office of Financial Aid.

The following types of scholarships and grants are available for undergraduate students:

- Merit Scholarships – for freshmen, based on high school GPA and SAT scores
- Transfer Scholarships – up to \$2,500 if the student transfers with a GPA of 3.5 or higher
- Wilson Presidential Scholarship – full tuition for a Community College transfer student - goes to approximately 60 students
- Other Foundation scholarships – some follow the “Wilson criteria”
- Pell Grants – need based

For some students, when merit scholarships are awarded, they are informed that they are eligible for other scholarships, such as the Parsons Scholarship. For students who receive these scholarships, the

merit funds they would otherwise have received may be reallocated to other students. Generally, the Office of Financial Aid does its best to exhaust all funds provided by the UB Foundation. However, some scholarships are very specific and may not have any students qualify in a given year.

For all the schools, scholarship funds are centrally administered by the Office of Financial Aid, with the exceptions of Academic Awards given by the schools. These are very low in monetary value. It was discussed whether such awards might be focused more on students who will be continuing at UB (not to graduating students).

For part time students, they must attend UB for a minimum of six hours to be eligible for financial aid. Pell grants are available to all students.

At this point, scholarships are not used as a recruiting tool. The question was raised if scholarships can be used to bring in a higher caliber of student. Currently, information about UB scholarships is sent to Maryland Scholars, a list of the top rising High School students. These top quality students are receiving offers from many schools, and UB is doing its best to compete. The hope is to have UB recruit a larger group of students in the middle range, as this is more realistically achieved.

As far as retention, in specialized cases, the Office of Financial Aid will work directly with a student with a specific need to help them to stay at the University of Baltimore. Because UB is small, the Office of Financial Aid has the ability to give that kind of individualized attention.

It was also discussed that a focus on community colleges is helping/will continue to help our transfer numbers. In some states admission and scholarships are guaranteed to community college students who meet certain criteria. It is something to consider.

In order for a student to receive any kind of financial aid, he or she must fill out a Free Education for Federal Student Aid (FAFSA) form, even if he or she is not eligible for FAFSA money. Doing so is encouraged but not required of all UB students; however, approximately 90% do fill out the form. For some students, receipt of other scholarship dollars will disqualify them from FAFSA dollars.

Additionally, some students are “burning through” their total loan eligibility because they spend a large amount of time pursuing their degree, and do not consider the total limit when applying for funding each term they attend. This is often true of community college transfers. Often, by the time the student reaches UB, it is almost too late to stop the trend.

For graduate students, things are slightly different. Most graduate students attend UB using loans, graduate assistantships, or employer reimbursement. Some institutional funds are used for targeted recruitment, for example, in Creative Writing. However, funds are more limited for graduate students. There are some UB Foundation funds directed at graduate students, however, there is no standard grant for them, and funds are limited.

A focus has begun to ensure that graduate assistantships are being properly used. These positions must be within the field of study of the student. Otherwise, they should be considered student workers. The distinction is important as student workers do not receive any tuition remission.

A discussion was had regarding the comparative discount rate at UB. Specifically, what our discount rate is across the different schools and programs, and how it compares to our direct competitors. This may

be difficult to determine and may be subjective given that some schools do not include all the relevant data in publically available venues.

In the past, UB offered different schedules for students, for example, the four by ten schedule in the Business School. Many of those alternative schedules were eliminated because of complications with Financial Aid. The Task Force would like to investigate the regulations regarding these types of alternative schedules and see if there is a way to implement them without overly complicating financial aid.

Finally, Federal Work Study was discussed. Prior to King and Hamill's tenure, UB underspent Federal Work Study dollars on a regular basis. Once focus began on spending these dollars, it became clear that students wished to work. In the first year the program was successful, and in the second year, the dollars were greatly overspent. In the past, overspending typically led to an increase in the Federal allotment, however, times have changed. As a result, the Office of Financial Aid currently focuses on only awarding dollars within our allotment.

These changes have resulted in an unintended consequence. Some areas (for example, Langswdale Library) used Federal Work Study dollars to hire student assistants, reallocating previously budgeted student assistant money to other expenses of budget reductions. Now that we are spending less in Federal Work Study, some of those departments do not have sufficient funds to support necessary student assistant coverage.

Following the briefing session with King and Hamill, it was agreed that the members of the Task Force would put together a set of areas for which they will likely ask for information from Financial Aid in the future. This communication is designed to be a "heads-up" so Financial Aid can begin to gather information which may be difficult to find.

### **Agenda Item: Law School Funding Collaborative Understanding**

On Wednesday, October 12, the President announced that Administration and the Law School had come to a collaborative understanding regarding funding for the law school. The President's University Budget Task Force was briefed on the decision following the Faculty Senate meeting on that day.

Members of the President's University Budget Task Force have since been approached by fellow members of the faculty and staff with questions regarding the collaborative understanding. A motion was introduced by Joe Wood that a memo from the Task Force regarding the Collaborative Understanding be distributed to Faculty and Staff. Dan Gerlowski seconded the motion and it carried unanimously.

Tom Darling agreed to put together a draft of a memo and circulate it to the Task Force members. It is also suggested that prior to the distribution of this memo that the President be informed the memo would be sent.

### **Research Questions**

Research questions identified at this meeting (which will be added to the ongoing list of research questions for the Budget Task Force), include:

1. Matching scholarship dollars offered to those who attend/graduate from UB.
2. UB's comparative discount rate across schools/programs, and also as compared to competitors.
3. Alternative schedules and Financial Aid.

### **Agenda for Next Meeting**

The Task Force agreed to the following agenda for its next meeting:

1. Finalizing request for information from the Division of Enrollment Management and Student Affairs (see attachment).
2. Discussion of financial data on the Provost's Office and Division of Enrollment Management and Student Affairs, for the purpose of exploring the utility of second-level financial information to the work of the Task Force. (Carry over from October 14 agenda.)
3. Discussion of the proposal submitted by Tom Darling, entitled "UB Expenditure Data Sets Desiderata" as a template for creating a template for data sets that will facilitate common usage and availability as well enhancing the overall integrity of the Task Force's work. (Carry over from October 14 agenda.)
4. Presentation of the work by Tom Darling and Karen Karmioli to create a "cross-walk" across different financial information systems for the purpose of creating a common understanding.

### **Work Between Meetings**

1. Harry Schuckel to distribute draft of questions to present to Office of Financial Aid, and, after approval, for Task Force to send to Financial Aid.
2. Tom Darling to distribute draft of memo to faculty and staff regarding Law School collaborative understanding.
3. Joe Wood to speak to President Bogomolny about distribution of the Task Force memo regarding the Law School collaborative understanding and send the memo from his office.

### **Future Meetings**

The next three meetings of the President's University Budget Task Force are as follows:

Thursday, October 27 – 10AM – Noon

Friday, November 4 – 10AM – Noon

Thursday, November 10 – 10AM to Noon

All meetings will take place in Academic Center Room 337.

The meeting was adjourned by unanimous vote at 12:05 pm.