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A Word from Our President

Dear Members,

On January 27th of this year, Governor George Pataki submitted his proposed budget to legislators and members of state agencies at the Capitol in Albany. His plan calls for major changes in the Tuition Assistance Program that may seriously impact student access.

The Governor's plan calls for a reduction in TAP awards from the current 90% of tuition charges up to a maximum award of \$4,125.00 to 75% of tuition charges, while still maintaining the \$4,125.00 limit. The plan also calls for penalties to be applied to any student who does not maintain a 15 credit hour load in any semester. The penalty calls for an additional reduction of 20% to the student's award, for any student completing less than 15 credit hours. This reduction would be applied in the semester immediately following the reduced load.

The plan also includes incentive awards for students who graduate on time, two years for an Associate or four years for a Baccalaureate degree respectively. The incentive award amounts to a payment equal to the reduction made during initial awarding and would be funded by the savings generated from the award limits going from 90% to 75% of tuition expense. My concern with this thinking is that the incentive awards would be made following graduation and may not have as significant a benefit for students.

It is important to understand that these proposals are just those, proposals and as such, are subject to change. Included in this newsletter is a copy of a HESC press release that further outlines many of the Governor's proposals. I urge you to read it carefully and seriously consider the implications of his plan.

James M. Sunser
President

HESC ANNOUNCES NEW CUSTOMER COMMUNICATION CENTER

HESC has expanded and streamlined its toll-free service for students and financial aid administrators. By dialing 1-888-NYSHESC (888-697-4372), you can access full financial aid information and a wealth of other services. In April, account status will be available 24 hours a day.

For all HESC customers—students, families, professional administrators, and counselors—the new Customer Communication Center provides a single point of entry for automated account status (for TAP and student loans), application processing, certification, electronic services, help desk, and details on such initiatives as New York's College Tuition Savings Program. For administrators, the call center also increases staff availability to answer questions.

The Customer Communication Center is the latest in a series of HESC initiatives aimed at improving service to its customers in the higher education community.

HESC Helps Schools with New Tax Reporting

The federal Taxpayer Relief Act of 1997—which created Hope Scholarship and Lifetime Learning tax credits—also mandated reporting requirements for those credits. A postsecondary institution must file an information return with the IRS for most potential recipients of the credits. To each of those recipients, the school must also provide a statement showing that the information has been reported to the IRS.

In response to the administrative burden on schools, HESC has launched a pilot project to produce 1998 reports for 43 institutions and their 200,000 students. Specifically, the agency, the schools, and the National Student Loan Clearinghouse are working together to:

- Create and distribute the 1098T tax form to each student
- Send a cumulative electronic file of all 1098T forms to each school for follow-up

- Transmit an electronic file for all schools to the IRS

The cost to the schools is 50 cents for each student record provided directly to HESC, and up to 75 cents per record if the school elects to use Clearinghouse data. Fees cover HESC's direct costs.

Part of HESC's "Full Service" program, the pilot is in line with the agency's statutory charge of enhancing student opportunity by coordinating with other government agencies.

Stafford Loan Application Replaced in New Processing Protocol

Say goodbye to the current Stafford Loan application.

This spring, HESC will adopt CommonLine Release 4 Master Promissory Note processing, replacing the old Stafford application with the Master Promissory Note. The agency will continue to maintain all current processing services.

Four-year and graduate-level schools will notice the greatest change, because the note will be serial and valid for up to 10 years. HESC is encouraging schools to participate, although participation is not mandatory until the 2000-2001 processing year.

In a related move, HESC will implement CommonLine Hold and Release to respond to new cash management regulations, which become effective July 1. The regulations require schools to apply loan funds to student accounts within three business days, or else refund the funds within 10 days. With CommonLine Hold and Release, schools can establish a "hold" status, so that HESC will transmit no funds until notified by the school. Schools not choosing this option will continue to receive funds electronically based on anticipated disbursement dates.

HESC is joining together with NYSFAAA to conduct a statewide video teleconference for school administrators, to give specific instructions for using the new MPN and EFT Hold and Release on their campus. The teleconference will be held April 9 from 9:30 a.m. – 11:30 a.m. Look for mailings about this event in late February.

HESC BRIEFS

This spring, HESC will distribute its **new grants and scholarships manual**. Each section will feature frequently asked questions (FAQs), while the version on the HESC website <http://www.hesc.com>

The Governor presented his proposed budget to the legislature and the press yesterday afternoon. Robert Maurer, HESC President, was one of the State agency leaders asked to provide a briefing on the budget's impact on the programs they administer. The following statement was shared with education leaders yesterday afternoon. Additional information will follow.

ROBERT J. MAURER REMARKS AT STATE BUDGET PRESENTATION

COLLEGE ACCESS AND ACHIEVEMENT PROGRAM

New York's student financial aid programs are among the most generous in the nation, providing more than one-fifth of all state-supported student financial aid. More than 83 percent of all New York high school graduates attend college or a career school.

Despite New York's long-standing record of providing the broadest possible access to a higher education, New York's college graduation rates are falling and students who do graduate are taking longer to attain their degrees: for two-year associate programs - dropping a fourth, from 41 to 30 percent in 13 years. Four-year bachelor degree attainments have slumped recently, with more students taking longer than four years to graduate.

Fewer than 40 percent of all New York State students graduate from bachelor degree programs in four years. Associate programs have a 2-year graduation rate of 12.6 percent, rising to only 25 percent in three years, 30 percent in four years.

As more and more students take an extra year or two to graduate costs at public and private colleges

increase up to 25 percent for each year that a student's graduation is delayed. Statistical studies reveal that students who delay completion are more likely never to graduate. Finally, the growing economic benefits of higher education may be lost forever to New Yorkers who do not complete a college education.

College Access and Achievement Program

The new College Access and Achievement Program (CAAP) is a recommendation to restructure the State's student financial aid programs in order to better prepare students for college-level work and to move students toward on-time graduation. The purpose of the program is to:

- Continue New York's commitment to assure affordable and equitable access to college
- Promote on-time completion of certificate, associate and bachelor degree programs
- Reward student and college performance in meeting high standards of academic progress, scholastic achievement and successful graduation. Students who graduate in a timely manner will receive more financial aid than under the current program.
- Encourage high school students to achieve new rigorous Regents diploma standards and to take appropriate academically challenging courses necessary for success in college.

The College Access and Achievement Program provides students and colleges a number of advantages:

CAAP would provide students with financial incentives, Achievement Incentive Dividends (AID), for on-time graduation, and on-time progress in the third and fourth years of college. Students completing programs on-time would actually receive more grant funds than is provided by the current TAP program.

CAAP would establish a new 15-credit minimum for full-time study in order to assure student progress toward completion of degree. Students must register for at least 15 credits and will receive a reduced award (80 percent) the immediate following semester if they

achieve less than 15 credits. Students seeking college as a short-term vehicle to a job can enroll in new career education programs at community colleges either through new short-term certificate programs or through InVEST. InVEST awards, a new federally funded career education option, will assure students jobs - the college is paid the full award only upon successful job placement.

CAAP also encourages use of early awareness programs to promote student academic preparation and knowledge about college attendance.

Existing awareness and outreach programs such as Liberty Partnership, STEP, C-STEP, that encourage students to prepare for college, will be coordinated in an effort to match newly available 'GEAR UP' funding from the federal government. The Higher Education Services Corporation (HESC) in the Fall will implement a new Internet-based student planning system that allows students, as early as the eighth grade, to begin planning for the high school courses necessary to fulfill college entrance requirement. The program, called NY On-line University, will provide students with an E-Mail address, provide counseling, permit students to create student profiles, allow students to visit and search New York college web sites and apply, on-line, for New York college admissions and state and federal financial aid.

At the center of the State's program is the Tuition Assistance Program (TAP) grant, providing need-based tuition awards to more than 280,000 students attending public or private colleges. The maximum TAP award is \$4125. The CAAP program restructures the TAP program in five ways.

A. Restructure of the Tuition Assistance Program (TAP)

1. A revised TAP partnership is established with students that reflects the State's commitment to provide a base award which equals up to 75 percent of the cost of college tuition based on family economic need. Currently, the TAP program meets up to 90 percent of tuition. The maximum award would remain at the present \$4,125.

2. A new TAP Achievement Incentive Dividend (AID) is awarded to students who graduate in a timely manner (four years for a baccalaureate degree, two years for an associate degree or up to one year for a certificate program). The reward would be paid at graduation and be equal to the 25 percent Expected Student Participation (ESP). This would provide a powerful incentive to graduate in a timely manner. In addition, students progressing on time will be eligible for an AID equal to the current \$200 reduction in TAP awards for upper-division students. In all cases, the effect is that students graduating on-time would receive a TAP base award and AID greater than under the current program awards. Students transferring from community to senior colleges would be eligible if they graduate on-time, within 4-years.

3. New TAP time-to-degree limits are established to encourage student academic readiness - TAP will be available for two years for associate programs, four years for baccalaureate programs, five years for certain extended baccalaureate programs and five years for students in approved college opportunity programs.

4. TAP payments will reflect the time to degree limits, with base payments given students who earn 15 credits or more per semester. Students earning less than 15 credits will receive an 80 percent, reduced award the following semester from the base payment provided they meet satisfactory academic standards currently established for TAP.

5. Federal income eligibility standards would be used to determine TAP awards in order to better reflect current federal and campus practice: conforming TAP family income eligibility from current New York Net Taxable Income (NTI) to a calculated amount using Federal Adjusted Gross Income (AGI). Income limits would be set at the equivalent of \$50,500 AGI.

Following is an excerpt from the 1999-2000 Executive Budget which describes the Governor's recommendation for HESC and the several programs it administers.

HIGHER EDUCATION SERVICES CORPORATION

MISSION

The Higher Education Services Corporation was established in 1974 to provide centralized processing of student financial aid programs. The Corporation administers the State's Tuition Assistance Program, the Federal Family Education Loan Program and other State and federal aid programs.

ORGANIZATION AND STAFFING

The Corporation is governed by a 15-member Board of Trustees, ten of whom are appointed by the Governor to six-year terms. The ten gubernatorial appointees include two student representatives, a representative of the general public, a college financial aid administrator, a chief executive officer of a proprietary institution, two presidents of independent institutions, one chief executive officer of a proprietary school and two banking representatives. The remaining five ex-officio members include the Commissioner of Education, the Chancellors of the State University of New York and the City University of New York and student government leaders representing the public university systems.

The Corporation's chief executive officer is the President, who is nominated by the Governor, subject to Senate confirmation. The President's responsibilities include administrative oversight of key program areas including legal counsel, data processing, operations, grants and scholarships, loans and research.

The agency will have a workforce of 869 employees in 1999-2000. Of this total, 710 positions (82 percent) are paid through funds received for the administration of federal student loans and 159 positions (18 percent) are paid from State funds for administration of State student financial aid programs. General administrative operations are located in Albany and Menands, while data processing operations are located in Troy.

FISCAL BACKGROUND AND BUDGET HIGHLIGHTS

The Executive Budget recommends \$712 million in support of agency operations and programs. Of this amount, nearly \$88 million will be available to support administration of State and federal student aid programs and \$624 million will be awarded in financial aid to students or colleges to provide access to postsecondary opportunities and help maintain New York's leadership in higher education.

General Fund support of \$10.7 million is recommended for administration of State grants and scholarships, an increase of \$257,000, primarily to cover costs relating to rental space and building code compliance. Approximately \$77 million of the operating budget represents federal loan-related functions, which are supported from non-General Fund sources. Costs for shared data processing, personnel, finance and other administrative activities are allocated proportionately according to time expended for State or federal activities. Of the \$624 million invested in financial aid and institutional grants, General Fund dollars account for more than \$614 million. Support for the remaining expenditures comes from federal funds and non-General Fund revenues.

STATE OPERATIONS

The Corporation will continue to improve administrative practices in 1999-2000 through investments in enhanced employee skills, modern technological infrastructure, and streamlined administrative practices as outlined in a newly-developed business plan.

In addition to a renewed emphasis on providing comprehensive services to their clientele, the Corporation continues to develop partnerships with guaranty agencies from across the nation to streamline costs, improve services, and increase responsiveness through shared development efforts.

FINANCIAL AID PROGRAMS

The 1999-2000 recommendation for the Tuition Assistance Program (TAP) is \$501.1 million on an academic year basis. This level of funding reflects a restructuring of the program to encourage students to progress toward timely completion of an undergraduate degree, which ensures that TAP remains available to students throughout their undergraduate college career, and reduced program expenditures attributable to income growth produced by a resurgent State economy. As a result of increases in family incomes and favorable employment opportunities, fewer students are expected to participate in TAP in the coming year, thereby generating a savings of nearly \$19 million.

Restructuring TAP is expected to achieve 1999-2000 savings of \$114 million.

Major components of the restructured TAP program are as follows:

- Establishing an "expected student participation" (ESP) equal to 25 percent of tuition; providing a TAP award at the lower of \$4,125 or 75 percent of tuition. Students would meet the cost of the ESP through federal grants, campus-based aid, work-study or student loans.
- Creating a "reward" program to be known as the Achievement Incentive Dividend (AID) program, whereby the ESP is refunded for TAP recipients who graduate in a timely manner -- i.e., two years for an associate degree and four years for a baccalaureate, with additional time for certain extended baccalaureate programs and for opportunity program students. In addition, students graduating on time will be eligible for a 'bonus' of the \$200 reduction currently applied against annual TAP awards after the fourth semester payment. As a result, students who complete their degree within these time frames would receive more State financial aid than at the present time.

- Redefining full-time study as 15 credits vs. the current 12 credits for receipt of TAP. Students enrolling in and earning 15 credit hours per semester would receive full TAP awards. Students enrolling in 15 credits, but earning less than 15 credits would receive 80 percent of a full-time award if they meet the satisfactory academic progress standards currently established for TAP.
- Apportioning the TAP maximum eight semester limit equally between two-year and four-year programs vs. the six semesters currently permitted for two-year programs. This will encourage students to complete their associate degree programs on a timely basis, and ensure students have not exhausted their TAP eligibility should they subsequently pursue a baccalaureate. Opportunity program students would be provided five semesters.
- Conforming TAP family income eligibility used for determining TAP awards from the current State's net taxable income (NTI) to the more widely used federal adjusted gross income (AGI) and reconciling State and federal criteria for determining a student's independent status will simplify the TAP program for both students and college financial aid officers. Setting income limits at the equivalent of \$50,500 AGI rather than the current \$50,500 NTI will ensure that TAP is targeted to those students most in need of assistance.

A total of \$10.5 million will support the continued phased implementation of the expanded Scholarships for Academic Excellence program, initially enacted in 1996. Under the expanded program, 2,000 of New York's top scholars will be eligible for annual awards of \$1,500 and 6,000 academically distinguished high school students will be eligible for annual awards of \$500 for four years of undergraduate study. By recognizing high school achievement, this program encourages our most academically talented students to pursue their postsecondary education in New York State.

To promote the efficient delivery of higher education services, several programs promoting access to higher education opportunities will be transferred from the State Education Department to the Corporation. These include: Bundy Aid (\$44.25 million in unrestricted aid to private institutions); Higher Education Opportunity Program (\$16.4 million); Liberty Partnerships (\$11.0 million); Science and Technology Entry Program (\$7.5 million); Teacher Opportunity Corps (\$750,000); and Postsecondary Aid for Native Americans (\$635,000).

PROGRAM HIGHLIGHTS STATE OPERATIONS

The Corporation continues to streamline and improve its computer systems for the payment and tracking of student financial aid funds. The Corporation's goal is to provide payments more quickly to students, parents and colleges and to improve the accuracy of State financial aid data.

In 1999-2000, the Corporation will coordinate the State's applications for five-year grants under the new \$120 million Federal GEAR UP program with State programs, such as "New York Mentoring" and "Ready Set Go", used to meet the matching requirements for the federal funding. The Corporation will develop alliances with educational and community-based organizations to focus program activity on at-risk youth to raise college awareness, ensure high school graduation and assist in college and financial aid application.

FEDERAL LOAN GUARANTEE PROGRAM

The largest part of agency operations is the administration of the Federal Family Education Loan program. Under this program, the Corporation guarantees over \$8.8 billion in outstanding loans made by banks to students. When banks are unable to collect loan repayments, the agency intervenes to avert default. If unsuccessful, loans are purchased from banks and measures are taken to bring such defaulted loans back into repayment. The Corporation also provides customer services for lenders, schools and students, which include the distribution of loan

information, as well as training and technical assistance related to loan applications and processing.

Federal loan activities administered by the Corporation include:

- \$1.57 billion in new guaranteed loans estimated for 1998-99;
- Loans guaranteed for approximately 260,000 individual borrowers; and
- Projected defaulted loan collections of over \$165 million and \$203 million defaulted loan purchases in 1998-99.

FINANCIAL AID PROGRAMS

The Corporation's State-funded responsibilities include processing student applications for State student financial aid programs, determining award amounts, processing and auditing aid payments to students and colleges, conducting reviews of participating institutions, collecting disallowed amounts identified in audits of participating institutions and providing information services to the public, students and schools for the following programs:

- Tuition Assistance Program: \$501.1 million in aid will be provided to students in the public and private sectors.
- Aid for Part Time Study: \$14.6 million will be available to nearly 23,000 part-time students in all sectors of higher education.
- Scholarships and Fellowships: 5,200 recipients are projected to receive aid for special employment preparation or targeted needs under fifteen State and Federal programs; in 1999, 21,000 Scholarships for Academic Excellence will be available to students pursuing their college education in New York State.

COLLEGE CHOICE TUITION SAVINGS PROGRAM

Signed into law in 1997, the College Choice Tuition Savings Program presents a major commitment by the

State to encourage families throughout New York to save for the college education of their children or grandchildren. Under this program, families can save for their children's education at accredited public and private colleges in New York or anywhere in the country by providing tax benefits on contributions made to, and interest earned on, college savings accounts.

Jointly administered by the Corporation and the Office of the State Comptroller, the program has been well received by the general public. Since its inception in September 1998, more than 55,000 enrollment kits have been requested, and more than 43,000 accounts have been opened, with contributions exceeding \$146 million.

NEW YORK STATE EDUCATION DEPARTMENT UPDATE

Respectfully submitted, Daniel Kinley, Director of Legislation

January 11, 1999

SUBJECT: Report on Federal Legislative Activities

Impeachment. The trial began on Thursday, January 7, 1999. The Senate subsequently passed a resolution outlining a procedure for the proceedings, which are to recommence on Thursday, January 14. The important question on the role of any witnesses has been left unresolved. Some have suggested that a vote on the articles of impeachment could come in early February.

Fortunately, the first weeks of a new Congress do not generally result in any substantive legislative action. The schedule originally intended for members to be back in their districts from January 8 through the 18th and then reconvene for the State of the Union address on the 19th.

The Senate. Trent Lott (R-MS), Ted Stevens (R-AK), and Jim Jeffords (R-VT) continue as Majority Leader and chairmen of the Committees on Appropriations and Labor and Human Resources, respectively. Senator Charles Schumer (D-NY) will sit on the

Banking, Judiciary, and Rules and Administration Committees.

The House. At a January 4 House leadership meeting, incoming Speaker Dennis Hastert (R-IL) highlighted education reform as one item in a four-point agenda for the new Congress. The others were cutting taxes, strengthening national defense, and saving Social Security. "Education reforms" were not specifically defined.

Bill Young (R-FL) assumes the Appropriations Committee chair. Maurice Hinchey (D-NY) joins our continuing members Republicans James Walsh and Michael Forbes and Democrats Nita Lowey and Jose Serrano. Mr. Walsh (R-NY) will chair the VA-HUD Subcommittee. Bill Goodling (R-PA) stays as Education and the Workforce Committee chairman. Democrats Major Owens and Carolyn McCarthy are still New York members.

Committee assignments for our new members include:

- Joseph Crowley * Resources, International Relations;
- Thomas Reynolds * Rules;
- John Sweeney * Small Business, Banking, Transportation; and
- Anthony Weiner * Judiciary.

Prognosis. This session should be interesting as both houses begin to consider the reauthorization of the majority of elementary and secondary education programs. Mr. Hastert is somewhat of an unknown quantity but appears to be more of a consensus-builder than Mr. Gingrich. The Republican House majority is smaller, which could make the moderates even more important in swinging votes. However, key Republican issues such as block grants, vouchers, and charter schools will still be much discussed. There also is a push to raise defense spending, which will have to come at the expense of domestic programs like education unless existing budget agreements are altered.

President's Briefing. On January 7, 1999, the President gave a briefing on his intention to ask for a tripling of the funding for the 21st Century Learning Centers Program in his Federal fiscal year 1999-2000 budget request. Funding would rise from \$200 million to \$600 million. The program funds after-school and summer school activities. New York State schools received over \$7.6 million from this program in 1998.

The President also announced that in awarding the new funds, the U.S. Department of Education would give priority to school districts that are ending social promotion by requiring that students meet academic standards to move to the next grade. The President is scheduled to make his budget public on February 1. We expect only modest education increases.

UPDATE - February 12, 1999

FY 2000 Budget Request. The President sent the Administration's proposal to Congress Feb. 1, with a request for a \$1.2 billion, or 2.1 percent, increase in education spending. Significant changes include:

<u>Program</u>	<u>FY 1999 Funding</u>	<u>FY 2000 Proposal</u>
21st Century Community Learning Centers	\$200 m	\$600 m
Class-Size Reduction	\$1.2 b	\$1.4 b
Title I Basic Grants	\$6.57 b	\$6.14 b
Concentration Grants	\$1.1 b	\$1.1 b
Targeted Grants	NA	\$756 m
Migrant Education	\$355 m	\$380 m
Comprehensive Reform	\$120 m	\$150 m
Charter Schools	\$100 m	\$130 m
Bilingual Teacher Training	\$50 m	\$75 m
Reading and Literacy Grants	\$260 m	\$286 m
Technology Lit. Challenge Fund	\$425 m	\$450 m
Adult Education State Grants	\$365 m	\$468 m
Institute of Museum and Library Services (IMLS) Museum Grants	\$23 m	\$34 m
Library Grants	\$166 m	\$155 m
National Endowment for Arts	\$102 m	\$152 m
Nat' Endowment for Humanities	\$113 m	\$151 m
IDEA Preschool Grants	\$374 m	\$402 m
Infant/Family Grants	\$370 m	\$390 m
Primary Education Intervention	NA	\$50 m
GEAR-UP	\$120 m	\$240 m
TRIO	\$600 m	\$650 m
Federal Work-Study	\$870 m	\$934 m
Teacher Quality Enhancement	\$75 m	\$115 m

- The \$200 million Class-size Reduction increase would help schools hire 8,000 new teachers while continuing to pay for the 30,000 hired in 1999.
- Title I funding changes would target more money to helping low-performing schools.
- While IMLS grants for library programs are reduced \$11 million, several project-specific grants funded last year are discontinued.
- Federal tax credits are proposed to pay interest on \$25 billion in bonds to build and renovate public schools. Two types proposed: School Modernization Bonds (\$22.4 billion) and Qualified Zone Academy Bonds (\$2.4 billion).
- The Title VI Innovative Education Program Strategies program (\$375 million) is eliminated.

Impact aid programs are reduced from \$864 million to \$736 million.

Other programs are level funded or receive token increases.

The modest Administration request for education is partly due to the caps on discretionary spending imposed as part of the 1997 budget agreement. Requested increases in areas like defense and health require balancing reductions in other programs. Some members of Congress, including Senate Appropriations Chair Stevens (R-AK), want to alter the caps somehow to meet critical spending needs, including education. The Congressional Budget Office recently estimated the budget surplus in FY 2000 to be \$131 billion. The Administration advocates that the bulk of the surplus first be used to save Social Security and Medicare; many congressional leaders want to use part of the surplus for general tax cuts. Congress will have its first opportunity to address the cap adjustment issue and earmarks for the surplus in the budget resolution that is supposed to be approved by April 15.

The House and Senate education committees have begun hearings on the ESEA reauthorization. The Administration's ESEA proposal is expected

sometime in March. All proposals will focus on accountability for results. Several states, including New York, have already adopted many of the initiatives to be proposed and are well along in their implementation.

The Senate Health, Education, Labor, and Pensions Committee (note the name change) approved a bill (S.280) on January 27 to expand the current Ed Flex demonstration program from 12 to all 50 states. The House committee hopes to take up a similar measure quickly, but the Administration is urging that the proposal wait to be included with the larger ESEA reauthorization.

If you have any questions or comments, please contact Clesson Bush at 518-474-1235; fax 518-473-9466; e-mail cbush@mail.nysed.gov.

REGIONAL NEWS

Western Region

The Western Region got together for a holiday luncheon and meeting at Ilio DiPiolo's Restaurant just outside of Buffalo, NY. The meeting, which was attended by approximately thirty of the Institutional and Associate members provided a nice break from the office and gave everyone a chance to share how they were going to be meeting the TRA 97 requirements.

The group was also given an overview of the site and dates of the June 1999 conference. As I am in my second year as the Regional Director, I also encouraged members to consider getting more involved with the organization by nominating themselves for the Regional Director position. I have currently received one nomination so if anyone else in the Region is interested please e-mail me of your interest at DANIEU@SSTAFF.SUNY.ERIE.EDU by March 1st 1999.

After we discussed some of the possibilities of the Part Time TAP, I concluded the meeting by asking our Institutional members to support our Associate members whenever possible.

I would like to thank Security Credit, Pioneer, Mercantile, NCO, ConServe, Immediate Credit, Credit Interchange and Regional Adjustment Bureau for helping put together a meeting that we all enjoyed.

The Region will be holding its next meeting some time in March to share our TRA 97 success or horror stories (hopefully the former)

New York City

Jean Belmont has been elected as the next NYC regional director -- effective June 1999.

Jean is the Bursar at Yeshiva University. She has worked in both financial aid and bursar offices throughout her career. Some prior positions include: Financial Aid Director at Pace University and Financial Aid Director at Hofstra University. She was also involved in various activities including: Regional Representative for NYSFAAA, Training for EASFAA, NYSFAAA in general. Jean also wrote a Debt Management workbook that is used nationally.

As she is eager to get started, please join me in welcoming Jean to her new post.

THOUGHT FOR THE DAY:

WHAT'S YOUR WORKING STYLE?

Shirley Walker

Pinpointing how you prefer to handle tasks can help you work smarter and get along better with co-workers. Determine your preferences by picking the statement that best fits you:

1. I shun the limelight, but I'm good at carrying out ideas others have thought through.
2. I have no qualms about breaking with tradition, and I like to focus on several things at once.
3. I like checking details, and I prefer to test things before going all the way because I want to know the possible consequences before I act.
4. I like being fully involved in things, and I'm happiest when my co-workers look to me for direction.

Analysis:

1. You're a "Doer," the one others can always depend on to follow through on plans.
2. Your choice labels you as a "Creator," the person who consistently offers lots of ideas or solutions.
3. You've identified yourself as a "Judge," the one who keeps the others from rushing in without carefully considering what results an action might bring.
4. You're what every group needs—a "Director," someone to organize the effort and run the show.

As seen in the March 1999 issue of Communication Briefings

"DANCE LIKE NOBODY IS WATCHING"

We convince ourselves that life will be better after we get married, have a baby, then another. Then we are frustrated that the kids aren't old enough and we'll be more content when they are. After that, we're frustrated that we have teenagers to deal with. We will certainly be happy when they are out of that stage. We tell ourselves that our life will be complete when our spouse gets his or her act together, when we get a nicer car, are able to go on a nice vacation, when we retire.

The truth is there is no better time to be happy than right now. If not now, when? Your life will always be filled with challenges. It's better to admit this to yourself and decide to be happy anyway. Alfred D. Sousa said "For a long time it had seemed to me that life was about to begin...real life. But there was always some obstacle in the way, something to be gotten through. First some unfinished business, time to be served, a debt to be paid...then life would begin. At last it dawned on me that these obstacles were my life." This perspective shows that there is no way to happiness...happiness IS THE WAY. So reassure every moment that you have. Treasure it more because you shared it with someone. So stop waiting until you finish school, until you lose 10 pounds, until you gain 10 pounds, until you have kids, until the kids grow up, until you get a new house or car, until the house or car are paid off, to decide that there is no better time than right now to be happy. Happiness is a journey, not a destination. Work like you don't need

money Love like you've never been hurt and Dance like no one is watching.

THE JOB CORNER

Associate Director, Student Accounts and Bursar Services School of VISUAL ARTS, a leading college of art located in midtown Manhattan with student populations of 2550 full time undergraduate, 300 graduate and 4000 continuing education students, seek an Associate Director for its Student Accounts and Bursar Services Department. The successful candidate's responsibilities will be to oversee the maintenance of student financial records, billing and collection of student's accounts, and daily reconciliation of receipts and deposits. Also, assisting the Director with the preparation of monthly reports, making recommendations for enhancing workflow, managing office staff, and responding to customer service concerns. Qualifications include a bachelor's degree in accounting or finance; at least five years supervisory and accounts receivable experience, preferably in a college environment; excellent oral and written communication skills; good judgment and interpersonal skills; proficiency with Windows software. Fax resume, cover letter and salary requirements to Director Of Human Resources, (212) 592-2628 or through our website at www.schoolofvisualarts.edu. EOE

STUDENT LOAN COORDINATOR, Bursar's Office New School University seeks a candidate to fill the position of Student Loan Coordinator in the University Bursar's Office. The responsibilities of this position include but are not limited to Perkins loan collections and due diligence, along with the delivery of Federal Family Education Loan Program (FFELP) funds to the university and our students. All responsibilities must be accomplished within Federal and University guidelines. This position works under the guidance of the Collections Manager and Assistant Bursar.

Responsibilities:

- Coordinate all tasks involved with collecting Federal Perkins Loan funds.

- Process and maintain all forms and documents regarding the Perkins Loan program.
- Record all pertinent information in student files when communicating with past due borrowers.
- Provide necessary support in verifying and processing FFELP funds in accordance with Federal and University requirements.
- Assist in the timely and accurate refunding of Federal Loan funds in compliance with all regulations.
- Provide friendly and courteous service to students, parents, and staff as it relates New School information and Bursar related activity.

Requirements:

- Thorough knowledge of federal Title IV programs, particularly regulations governing the Perkins Loan program and Federal Family Education Loans.
- B.A. in Business Administration, Finance, or related field.
- Two or more years of administrative experience in a higher education environment preferably within a Collections Department and/or Student Loan Department.
- Knowledge and experience in working with large mainframe receivable systems, as well as experience working with Microsoft Excel and/or Lotus 1-2-3.
- Excellent analytical and communication skills necessary.

Benefits: Free tuition, Paid vacation, Comprehensive health insurance.

Interested applicants should submit a resume with a cover letter with salary requirements to Peter Ljusic, University Bursar, New School University, 66 West 12th Street, New York, NY 10011. Please include the position number indicated.

New School University, as well as its individual academic departments is committed to a policy of equal opportunity in all its activities and programs including employment promotion. It does not

discriminate on the basis of race color, national or ethnic origin, citizenship status, religion, sex, sexual orientation, age, physical handicap, veteran or marital status.

UPCOMING EVENTS

Direct Loan Annual Conference

March 28 to 30, 1999

Marriott Wardman Park Hotel, Washington, D.C.

The U.S. Department of Education will sponsor the 1999 Direct Loan Annual Conference from March 28 to 30, 1999, at the Marriott Wardman Park Hotel in Washington, D.C. Secretary of Education Richard W. Riley will address the conference on Monday, March 29, at a session on the future of federal student loan programs. The newly appointed Chief Operating Officer of the Office of Student Financial Assistance Programs, Greg Woods, will open the conference on Sunday, March 28, with the keynote address. Mr. Woods will present an overview of the new SFA Performance Based Organization (PBO), the role of the Chief Operating Officer, and the resulting impact on the management of student financial assistance and policy development.

The Office of Student Financial Assistance Programs is the first Performance Based Organization (PBO) in the federal government. Congress and the administration established the PBO to modernize the delivery of student financial aid and improve service to millions of students and the postsecondary institutions they attend. Mr. Woods will also share his goals and vision for the future of the Department of Education and the Direct Loan Program. Other conference topics include an overview of the new ACCESS FOR AMERICA FOR STUDENTS initiative, the new master promissory note process, new institutional tax reporting requirements, reconciliation and drawdown issues, software changes, and an overview of the Grant Administration and Payment system. Schools will have the opportunity to discuss specific issues with representatives from the Loan Origination and Direct Loan Servicing Centers.

Call the Marriott Wardman Park Hotel (formerly the Sheraton Washington Hotel) directly at 202/328-2900 to make room reservations. Reservations must be made by February 26, 1999, in order to receive the special group rates of \$160.30 (including tax) for single occupancy or \$194.65 (including tax) for double occupancy.

For more information on conference specifics, visit the Direct Loan web site at <http://ed.gov/DirectLoan/conferences> or contact Sarah Utz, U.S. Department of Education, at 202/260-5032, or sarah_utz@ed.gov.

NYSOBBA MEMBERSHIP

The following people are renewing their institutional membership and are not in the current directory.

Christopher Rollins (replaces Marc Wolfe)
Vice President
ConServe - Accounts Receivable Management
P.O. Box 7
Fairport, New York 14450-007
#800-724-7500

Robert J. Van Malderghem,
Bursar-College Accountant
SUNY at Morrisville
Administration Building
Morrisville, NY 13408
Phone 315-684-6069 Fax 315-684-6261
Region Central

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Assistant Vice President
Marine Midland Bank
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Buffalo, NY 14240
phone: 716-841-6503 fax: 716-841-6088

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Kehoe Bldg., Rm 101
Plattsburgh, NY 12901
Phone 518-564-3119 Fax 518-564-3116
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New York, NY 10003
phone: 212-460-8567 fax: 212-460-9679

Lileith Lynch
Business Manager, Bursar
Ultra Sound Diagnostic School
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New York, NY 10003
phone: 212-460-8567 fax: 212-460-9679

Joan Warren
Director of Financial Aid
The Juilliard School
60 Lincoln Center Plaza
New York, NY 10023
phone: 212-799-5000X 211 fax: 212-724-0263
E-mail: jwarren@juilliard.edu

Look for us on the web.

<http://wings.buffalo.edu/services/stu-acc/nysobba/nysobba.html>

Sponsored by the
Commissioner's Advisory Council on Higher Education
and the
New York State Education Department
Office of Higher Education

At the
Brooklyn Marriott
333 Adams Street, Brooklyn
March 18, 1999
from 8:30 a.m. to 4:00 p.m.

Cost: \$175 per person, lunch included
(Make check payable to Regents Research Fund)

Presenters

Michael Nettles – University of Michigan
Michael Rosenthal – Maryland Higher Education Commission
Gary Miller – Pennsylvania State University
D. Bruce Johnstone – State University of New York at Buffalo

A question and answer period will follow the presentations on the issues.

For further information contact:
Gerald W. Cross, Jr. at (518) 474-5851
or E-Mail gcross@mail.nysed.gov

* * * * *

This Summit is being conducted at a location that meets the accessibility needs of individuals with disabilities who will be attending. If reasonable accommodations such as interpreters, assistive listening devices, large-print or braille materials are needed, please contact Gerald W. Cross, Jr., Office of the Deputy Commissioner for Higher Education at (518) 474-5851 for information or assistance.

CHALLENGE 2000 – A HIGHER EDUCATION SUMMIT

The New York Marriott at Brooklyn
333 Adams Street
Brooklyn, NY 11201

March 18, 1999

WHAT	RESULT	HOW	WHO	TIME
Registration and hospitality	Participants registered; Summit materials distributed	Table outside Room D	Participants	8:30 – 9:00
Welcome and opening remarks	Participants welcomed	Presentation	Gerald W. Patton	9:00 – 9:05
Introductions	Introductions of Kenneth Shaw, Michael Nettles, Michael Rosenthal, Gary Miller and D. Bruce Johnstone	Introductions	Gerald W. Patton	9:05 – 9:10
Keynote address	To be announced	Presentation	Richard P. Mills Kenneth Shaw	9:10 – 9:35
The issues	Participants provided with perspectives on the issues of: "Institutional Effectiveness and Accountability" "K-16 Articulation and Collaboration" "Technology and Distributed/Distance Learning" "College Costs, Affordability and Access"	Presentations	Michael Nettles Michael Rosenthal Gary Miller D. Bruce Johnstone	9:35 – 10:40
Questions and answers	Participants provided with a chance to question the panel on the issues	Question and answer	Participants	10:40 – 11:00
Break and transition	Participants move to assigned ** conference rooms to begin discussions on the issues			11:00 – 11:15
Small group discussions	Focusing on one topic, each group will identify and prioritize the issues within the topic.	Brainstorming; list reduction; prioritization	Participants	11:15 – 12:30
Lunch – Conference Room E				
Small group discussions	Continuing the discussions begun before lunch, each group will identify the obstacles to addressing the issues with the highest priority and possible means of overcoming them.	Facilitated discussion; brainstorming	Participants	1:30 – 3:15
Break and transition	Participants return to Conference Room D			3:15 – 3:30
Wrap-up	Closing remarks by Deputy Commissioner Patton and Advisory Council Chair Shaw	Presentation	Gerald W. Patton Kenneth Shaw	3:30 – 4:00

**Note: Your conference room assignment is indicated by a capital letter on the upper right corner of your name badge.

March 18, 1999
8:30 a.m. - 4:00 p.m.

Registration Form

Name _____
Title/Position _____
Institution/Organization _____
Address _____
City/State/Zip _____
Telephone _____
Fax _____
E-mail _____

Issues (Please number 1-4, in order of preference, 1 being the most preferable.)

- _____ *Institutional Effectiveness and Accountability*
- _____ *Technology and Distributed/Distance Learning*
- _____ *College Costs, Affordability and Access*
- _____ *K-16 Articulation and Collaboration*

Special Accommodations (Please note any that may apply.)

- _____ assistive listening device
- _____ large-print or braille materials
- _____ sign language interpreter
- _____ other (please specify):

For your convenience, a stamped envelope is enclosed for your use in returning this registration form and check, made payable to Regents Research Fund, **by Monday, February 22, 1999.**

Special Note: This has been extended to **March 5, 1999** for NYSOBBA members.

**NEW YORK STATE ORGANIZATION OF
BURSARS AND BUSINESS ADMINISTRATORS**

1998-99 INDIVIDUAL/INSTITUTIONAL MEMBERSHIP FORM

Please complete this section if you are requesting an **INDIVIDUAL** membership and attach payment of \$60.00. Make check payable to NYSOBBA. Please write/print legibly.

NAME last _____ First Mr./Mrs./Ms./Miss _____
Title _____
Institution _____
Address _____ City, State _____
Zip Code _____
Telephone _____ Region _____ Fax # _____

Please complete this section if you are requesting an **INSTITUTIONAL** membership and attach payment of \$175.00. Make check payable to NYSOBBA. Institutional memberships allow five (5) members on NYSOBBA database.

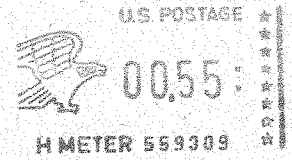
NAME Last _____ First _____
Title _____ Telephone # _____
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NAME Last _____ First _____
Title _____ Telephone # _____
NAME Last _____ First _____
Title _____ Telephone # _____
Institution _____
City, State, Zip Code _____
Region _____ Fax # _____

Please return this form with your payment to: **Mr. Larry Brennan, Bursar**
SUNY Health Science Center
155 Elizabeth Blackwell Street,
Syracuse, NY 13210

REGIONS: Western Genesee Valley Central Northeast
New York City Long Island Mid-Hudson

NYSOBBA

c/o Office of Student Accounts
Teachers College, Columbia University
525 West 120th Street, Box 305
New York, New York 10027



Mrs. Peg Ehmann Bursar
University of Rochester - Med/Dent
601 Elmwood Ave. - Box 601
Rochester, NY 14642

Highlights of what's inside.....

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