

**DISCUSSION/ACTION**  
**February 27, 2009**

**HIGHER EDUCATIONAL AIDS BOARD**

**BOARD REPORT #09-13**

**2009-10 WHEG - WTCS PROGRAM FORMULA**



February 25, 2009

Ms. Connie Hutchison  
Executive Secretary  
Higher Educational Aids Board  
131 West Wilson Street  
Madison WI 53707-7885

Dear Secretary Hutchison:

I am submitting to you the Wisconsin Technical College System's recommendation for the 2009-2010 WHEG formula. The formula was developed with the input of technical college financial aid administrators and student services administrators.

2009-2010 WTCS WHEG FORMULA

Single Formula—Independent/Dependent Students

Student Budget	\$9,000
Award Percentage	13%
Maximum Award	\$1,170
Minimum Award	\$494

Should additional funds become available, I would request the opportunity to modify this recommendation.

For 2009-2010, we recommend increasing the student budget used for the WHEG formula from \$8,500 to \$9,000, to continue to make progress toward a more realistic picture of WTCS student costs. We recommend raising the level of the maximum award for the neediest student to \$1,170. This is necessary to address the high unmet financial need of technical college students, which continues to be higher than for students in other Wisconsin higher education sectors. For the fourth straight year, we recommend increasing the minimum award level, this time to \$494, to help focus assistance on those with the greatest need.

I would also like to make you aware of the WTCS WHEG goals that were developed with the technical college financial aid directors. These goals reflect a level of support for the WTCS WHEG program that would allow us to reasonably meet the needs of technical college students.

- Serve the same or a greater number of technical college students
- Continue to serve technical college students with the highest unmet need
- Increase the maximum award amount to at least \$1,750 in order to meet at least 20 percent of a student's calculated financial need

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Daniel Clancy, President

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- Have the ability to make awards in the second semester for January starters, in recognition of the non-traditional enrollment patterns of many technical college students
- Tie the WTCS WHEG allocation to WTCS tuition levels over the past three years, in the same way that statute links the University of Wisconsin's WHEG allocation to tuition
- Fully expend the WTCS's WHEG allocation each year
- Maintain student eligibility requirements at six credits and Wisconsin residency, the same as for University of Wisconsin students
- Keep one WHEG formula that applies to both dependent and independent students
- Continue to use the federal methodology to calculate student financial need

While many of these goals are not achievable under the current WHEG appropriation level, they set the direction in which we must work to offer adequate financial aid support to our technical college students. I appreciate the Higher Education Aid's Board's efforts to increase the appropriation for the WTCS's WHEG, and I look forward to continuing to work with you in the future to secure a better level of support for our students.

Thank you for your staff's assistance in providing vital information for developing our recommendation. We are pleased to offer this recommendation for your consideration.

Sincerely,

A handwritten signature in cursive script that reads "Daniel Clancy". The signature is written in black ink and is positioned above the printed name and title.

Daniel Clancy  
President

**PROPOSED 2009-2010 FORMULA  
WISCONSIN HIGHER EDUCATION GRANT  
WISCONSIN TECHNICAL COLLEGE SYSTEM**

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**Recommendation of the Wisconsin Technical College System President Dan Clancy:**

**$(\$9,000 - \text{EFC}) \times 13\% = \text{Award}$**

**$(\text{Student Budget} - \text{Expected Family Contribution}) \times \text{Student Award Percentage} = \text{Award}$**

Maximum Award: \$1,170      Minimum Award: \$494

(See attached letter.)

**Recommendation of the Executive Secretary**

Agrees with the recommendation of President Clancy

Other Information

**2009-2010 Appropriation: \$17,723,500<sup>1</sup> per Governor's budget and subject to change**

**2008-2009 Appropriation: \$17,548,000**

**2007-2008 Appropriation: \$17,130,200**

**2006-2007 Appropriation: \$16,712,400**

**Current Formula:**

**$(\$8,500 - \text{EFC}) \times 13\% = \text{Award}$**

**$(\text{Student Budget} - \text{Expected Family Contribution}) \times \text{Student Award Percentage} = \text{Award}$**

Maximum Award: \$1,105      Minimum Award: \$429

**Current Year Spending:** All of the 2008-09 funds will be spent. Awards were suspended August 21, 2008. No new awards have been processed since that time.

**Applicants:** As of February 10, 2009 there are 66,230 applicants compared to 58,769 at this time last year.

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<sup>1</sup> The 2009 – 2010 appropriation is not final until the budget bill goes through the legislative process and is signed by the Governor.