

The Ohio Board of Regents
Unit Record Financial Aid Data Working Group
January 28, 2008
Conference Call Minutes

I. Introductions

In attendance:

Greg Guzman, Bowling Green State University
Conrad McRoberts, Bowling Green State University
Dave Metz, Columbus State Community College
Marge Rozmarynowycz, Lorain County Community College
Mike Williford, Ohio University
Betsy Johnson, Owens State Community College
Dana Pawlowicz, University of Cincinnati
Barbara Bullock, Wright State University
Jennifer Penick, Wright State University

Darrell Glenn, Ohio Board of Regents
Jay Johnson, Ohio Board of Regents
Katie Hensel, Ohio Board of Regents
Bill Wagner, Ohio Board of Regents
Andy Lechler, Ohio Board of Regents
LeAnn Unverzagt, Ohio Board of Regents
Vonetta Woods, Ohio Board of Regents

II. Tuition and Fees Data Collection

A. Recap of options and comments

- The following options were previously submitted to the group and were discussed during the conference call.
 1. Do not collect unit-record data on charges. Deduce the charges from the tuition and fees table and the credits attempted data from HEI.
 2. In the current HEI Student Enrollment (SN) file, include a single dollar figure for tuition and fees charged for the term. It is not certain at this point whether the figure would include just the tuition and general fee, or if it would be more all-inclusive.
 3. Collect a new Tuition and Fees file that would include separate figures for each type of charge.
 - Per the feedback Darrell Glenn received from the consultation group, Option 3 was the most recommended.
- Darrell Glenn proposed a simplified tuition and fees file that would include student identifier, institution, term, type, dollar, and comment fields. The type field could be expanded to provide the level of detail needed. The simplest solution would include only two type codes: one for tuition and general fees (the items that would add up to a school's posted sticker price) and another for any other additional instruction-related fees.

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- A campus representative suggested having a detailed breakout of fees that are similar across campuses but also have a catch all field such as “other” that will catch the campus specific fees.
 - Andy Lechler noted that it is important to separate instruction-related fees from those that are not. Also, should auxiliary fees such as room & board, parking, etc. be reported as “other” or should this field pertain to instruction-related fees specifically and exclude auxiliary fees?
- Some campus representatives recommended reporting lab, course, and non-resident surcharges in the file separately.
 - Darrell Glenn thought that this information could be gathered from tuition but campus representatives informed him that such an assumption would not necessarily reflect that information.
- Some campus representatives recommended reporting out-of-county/district, out-of-state, and in-state fees separately.
- Some campus representatives suggested reporting fees such as computer and technology fees.
- A campus representative looked at the Sources of Education and General Revenues (SR) File and asked if the new data collection could gather similar data.

B. Update on information needs

- Darrell wants the numbers reported in the new tuition and fees file to represent the tuition and fees figures published by institutions.
- The data reported should pertain to undergraduate students only. The data should also include all undergraduate students whether or not they receive financial aid.
- Darrell Glenn cautioned about breaking the data down too minutely if it is unnecessary. Some data elements require greater detail than others. For example, any reports generated will probably group the data into five or fewer categories so it is unnecessary to have ten categories in the file specification.
- Campus representatives stressed having good definitions up front along with examples.
- A campus representative asked about the state’s definition of net attendance cost. Darrell Glenn shared that there is really not a single definition. However, he indicated that tuition and any other fees related to instruction are of interest when discussing net attendance cost.
- Darrell Glenn shared that tuition flexibility may be a part of our future if not at the tuition level, at the other fees level.
- Katie Hensel noted that the data collected in the new tuition and fees file may differ from that reported in the Fall Survey of Student Charges.

C. Suggestions to Consider

- Have one number for tuition and general fees.
- Have out-of-district and out-of-state surcharges reported separately.
- Consider including other fees such as lab, computer and technology fees.

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- Have a detailed breakout of fees that are similar for campuses and also have a catch all field such as “other” that will catch the campus specific fees.
- Have an overall catch all for some of the instruction related fees. Do not break down data too minutely for each campus because that level of detail is unnecessary for all fees. Some areas can be detailed while others can be grouped.
- Put a working group together to determine the data necessary for tuition and fees reporting because institutions may report the data differently due to differing campus policies.
- Meet in person before requirements are finalized. In the meantime, campuses can begin to consult amongst themselves about their fees and determine similarities and differences. Maybe their data will have commonalities that will drive the tuition and fees file collection.
 - Have campuses bring their fee information to the meeting for group discussion and collaboration.
- Consult with campus Higher Education Information System (HEI) data reporters to ensure that campus resources can support such data collection.

III. Financial aid data collection

A. Review existing pilot specs

- The pilot group would like to see the file continued and stated that it was not difficult to report the data.
- Campus representatives requested the financial aid specifications from the pilot data collection.
- A campus representative asked if the file will be collected annually or by term.
 - Darrell said that the file could be an annual file or term file; whichever is easier for campuses. If it is collected annually, campuses can include all of the terms in a single file.
- A campus representative asked how to report grants that turn into loans if students do not meet the grant requirements, and other similar instances.
 - It was recommended to report the grant or loan as it is awarded.
 - Darrell Glenn agreed with reporting financial aid as it is awarded.
- Campus representatives noted that the Social Security Number (SSN) field in the proposed file layout should be changed to a general student identifier field because Social Security Numbers are not always available.
- Campus representatives stressed that tight definitions are necessary for the categories and fields of the file. They would also like examples provided with the definitions.
- A campus representative recommended including every possible award to determine what students actually receive.
- A campus representative asked if tuition waivers should be included.
 - Per Darrell Glenn and pilot participants, yes tuition waivers should be reported.

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- Darrell Glenn also noted that institutions can include employer tuition discounts as grants. However, he does not need to know the specific detail about each type of grant. He just wants to know if it is a grant or a loan.

B. Grants

- A campus representative asked for the definition of grants, per the proposed financial aid file, and if grants are synonymous with scholarships.
 - Darrell indicated that grants are monies that students receive and do not have to payback. Darrell noted that the wording can be changed to “grant or scholarship.”
- Darrell Glenn wants to distinguish between monies students have to pay back and those they do not. Monies students have to pay back should be reported as loans.

a. Source Categories

- Campus representatives asked for clarification about the “Third Party” category and what type of information should be reported.
- Darrell Glenn asked who the third party will be if detailed information is needed about them.

b. Type Designation

- Campus representatives were fine with the proposed grant types.

C. Loans

a. Source Categories-Same as grants?

- Campus representatives noted that the proposed source categories are fine and can apply to both loans and grants.

b. Types

- Campus representatives noted that if the terms subsidized and unsubsidized were only used for types, many will imply that the terms refer only to federal loans and would be confused about how to categorize other loans such as private loans.
 - A campus representative noted that all private loans should be considered unsubsidized.
 - The group as a whole agreed that if this category remains, further clarification is necessary.
- A campus representative noted that all parent loans are unsubsidized so the type should just read “Parent Loan”.
- Grad Plus is a student loan that follows the rules of a Parent Loan.
- Campus representatives recommended removing the loan type field but if it remains, specify the specific loan program or source (Grad Plus, Perkins, etc.). However, the existing Type (Need, merit, athletic, other) and Source (Federal, state, institutional) fields might be sufficient to properly categorize loans.

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IV. Next steps

- Darrell Glenn will send out the financial aid specifications from the pilot data collection.
- Darrell Glenn will set up a meeting for the consultation group to meet in person. He is considering trying to schedule the meeting during the week of February 11th.

V. Adjourned