

ALVERNO COLLEGE
BELOIT COLLEGE
CARDINAL STRITCH UNIVERSITY
CARROLL UNIVERSITY
CARTHAGE COLLEGE
CONCORDIA UNIVERSITY
EDGEWOOD COLLEGE
LAKELAND COLLEGE
LAWRENCE UNIVERSITY
MARIAN UNIVERSITY



MARQUETTE UNIVERSITY
MILWAUKEE INSTITUTE OF ART & DESIGN
MILWAUKEE SCHOOL OF ENGINEERING
MOUNT MARY COLLEGE
NORTHLAND COLLEGE
RIPON COLLEGE
ST. NORBERT COLLEGE
SILVER LAKE COLLEGE
VITERBO UNIVERSITY
WISCONSIN LUTHERAN COLLEGE

PRESENTATION

Before the Legislative Council Special Committee on Review of Higher Education Financial Aid Programs

By
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Wisconsin Association of Independent Colleges and Universities

August 17, 2010

WHY ARE WE HERE?

Student aid is an arcane subject with its own specialized lingo and jargon. The federal student aid application until just recently has been a source of frustration for parents and students alike. Financial aid professionals devote countless hours helping students navigate the paperwork and the bureaucracy. Bless them for what they do; but aid administration is **not** why we are here.

American higher education is the envy of the world, and the people of Wisconsin have historically given a high priority to colleges and universities. Indeed, four of my members—Beloit College, Carroll University, Lawrence University, and Carthage College—were founded before Wisconsin became a state. They are great institutions, but institutions are **not** why we are here.

We are here—first and foremost—for the students. Unlike our colleges, I do not date to the nineteenth century, but I do date to the 1960s. The slogan then was, “power to the people.” Student financial aid is all about investment in individuals, about helping individuals develop their potential and fulfill their dreams.

We are also here to make sure that Wisconsin has a future. Many have pointed out that our economy has evolved from one based on what we could grow (agriculture), to what we could make (manufacturing) to one based on ideas: The Knowledge Economy.

For Wisconsin to have a future, we need to invest in the future and in people. I realize we all know this, but reminders—recourse—to “first things” are important.

Increasing the percentage of Wisconsin’s population with postsecondary degrees at all levels is central to the future civic and economic vitality of our state. The key challenge facing policymakers is how to devise the most **cost-effective** strategies to move us forward from where we are today.

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The Absolute Necessity for More College Graduates in Wisconsin

Wisconsin needs more college graduates to: (1) increase our per capita income (currently two percent below the national average, and twelve percent below the per capita income of Minnesota)¹; (2) to replace retiring baby boomers in the workforce; and (3) to diversify our state's economy. This is our problem today, but Wisconsin's relative position is only going to get worse as other states, and other countries, increase the percentage of their population going on to post-secondary education.

For more than a decade, researchers and organizations have been urging Wisconsin's government, education, and business leaders, as well as the general public, to dedicate themselves to increasing the number of college graduates in the state. (Full disclosure: I was a contributor/co-author of a number of these reports.)

In 2002, the Wisconsin Technology Council documented that Wisconsin needs 150,000 additional college graduates by 2020 just to bring the state in line with U.S. per capita income.² In 2006, Competitive Wisconsin, Inc., made the case for an additional 170,000 graduates— noting that Wisconsin should not settle for average, but should set its goal to be above average, in order to raise our per capita income level to that of neighboring Minnesota.³ In early 2009, the Lumina Foundation for Education urged the United States to “increase the percentage of Americans with high-quality degrees and credentials from the longstanding rate of 39 percent to 60 percent by the year 2025.”⁴ This represents an increase of 23 million graduates nationwide above current levels of production. Under this scenario, Wisconsin would need an estimated 300,000 additional post-secondary credential holders.⁵

Whether Wisconsin's goal should be 150,000, 170,000 or 300,000 additional degree holders, Wisconsin needs to change the status quo. At best, if Wisconsin continues on its current college attainment path, it is destined to experience **stagnation**. What is more likely, if nothing changes, is a relative **decline** as other states, and other countries, continue to outpace us and focus their efforts on growth, not on the status quo.

Demographics are working against us

At the very time Wisconsin must increase its postsecondary attainment rate, we will be working from a shrinking base of students. In 2000, the number of seventeen and eighteen year olds in Wisconsin was 162,245. In 2010, the number is expected to have fallen by over 8,000 people to 153,799. By 2020, the number will decline even further to 143,274, for a loss of almost 19,000 people over the twenty year period.⁶ This in turn means that the number of Wisconsin high school graduates is projected to be relatively flat between now and 2020, ranging between 65,000 to 68,000 graduates each year.⁷

If recent trends continue into the future, between 45 to 47 percent—less than half—of these high school graduates will enroll in a WAICU, WTCS, UW System, or Tribal college or university.⁸ Consequently, if Wisconsin wants to increase its home-grown college graduates it must do more

to ensure that a larger proportion of its high school graduates, and even more people ages 25 and older, earn a post-secondary credential.

Compounding the overall demographic decline is the increasing poverty rate among Wisconsin residents. In 1999, 8.8 percent of Wisconsin families with children under 18 years of age lived in poverty. In 2007, this rate increased to 11.2 percent.⁹ Among adults in general (people ages 18 and over) the poverty rate has also increased. In 1999, the rate was 7.8 percent and in 2007, it rose to 9.5 percent. Furthermore, a substantial proportion of Wisconsin's children – 34 percent – now live in “low-income” families (defined as income below 200 percent of the poverty level, which is also the threshold for BadgerCare and Low Income Energy Assistance).¹⁰

The incidence of poverty is highest among students of color, and the population of students of color is growing. Given Wisconsin's current economic and demographic trajectories, this means that as the state moves to the year 2020, a growing share of Wisconsin residents, and high school graduates, will be from low-income families. During 1998-99, 10 percent of Wisconsin's public high school graduates were students of color. By 2020, this proportion is expected to grow to 23 percent.¹¹

Wisconsin needs more college graduates, yet the proportion of Wisconsin students who are low-income and minority is growing. Wisconsin needs to focus its investments in the people who need assistance. When times are tough the state should **target its investments** to those programs in which the investments will make a difference.

Wisconsin needs to face facts—the primary way to “grow our own” population of knowledge workers is to invest in those Wisconsin citizens who have the fewest resources to help themselves.

ADEQUATE, EQUITABLE FINANCIAL AID FUNDING IS KEY

There are numerous studies from the past two decades that indicate adequate financial aid, especially in the form of grants, helps ensure that low- and moderate-income students access, persist, and graduate from college.¹²

Two of the latest reports were released this spring. In April, the National Bureau of Economic Research concluded that **inadequate financial aid is the major factor** contributing to low-income students' inability to obtain a bachelor's degree in a timely manner: “While clear evidence in the U.S. and abroad indicates that the rate of degree attainment responds to incentives in financial aid and tuition pricing, our analysis also indicates that reducing students' financial burdens while enrolled in college would help to reduce time to degree.”¹³

In June, the U.S. Congressional Advisory Committee on Student Financial Assistance reported that its “findings suggest that total grant aid from all sources is not adequate to ensure the enrollment and persistence of qualified low- and moderate-income high school graduates.”¹⁴ Furthermore, the Committee's research indicates that between 2000 and 2009 **at least three**

million academically qualified low- to moderate-income students were unable to obtain a bachelor's degree precisely due to financial constraints. To stem the waste of young talent, the Congressional Committee recommends the following policy initiatives relating to student aid: (1) increase need-based aid from all sources; (2) offset the increases in the price of college with increased need-based student aid; (3) address the trend toward merit-based aid and the increasing reliance on loans. The committee's recommendations make good policy sense for Wisconsin, and I will return to those recommendations a bit later.

We must never forget we are talking about flesh and blood people, not cold statistics. WAICU's monthly publication, *WTG Achievers*, reports first-hand accounts of the importance of the Wisconsin Tuition Grant to Wisconsin students. A selection of recent issues of *WTG Achievers* is attached to my presentation (see Appendix 1). You will hear later from one of those students, Maria Flores, who also sits as a student member of the Higher Educational Aids Board. The Wisconsin Tuition Grant, as part of a comprehensive student aid package, has played a significant role in the lives of students who are first-generation, people of color, single mothers, veterans, returning adults, and students who transfer between institutions.

WISCONSIN LAGS THE NATION AND THE MIDWEST IN KEY MEASURES OF STATE COMMITMENT TO NEED-BASED FINANCIAL AID

The Federal Government is increasing aid in every state

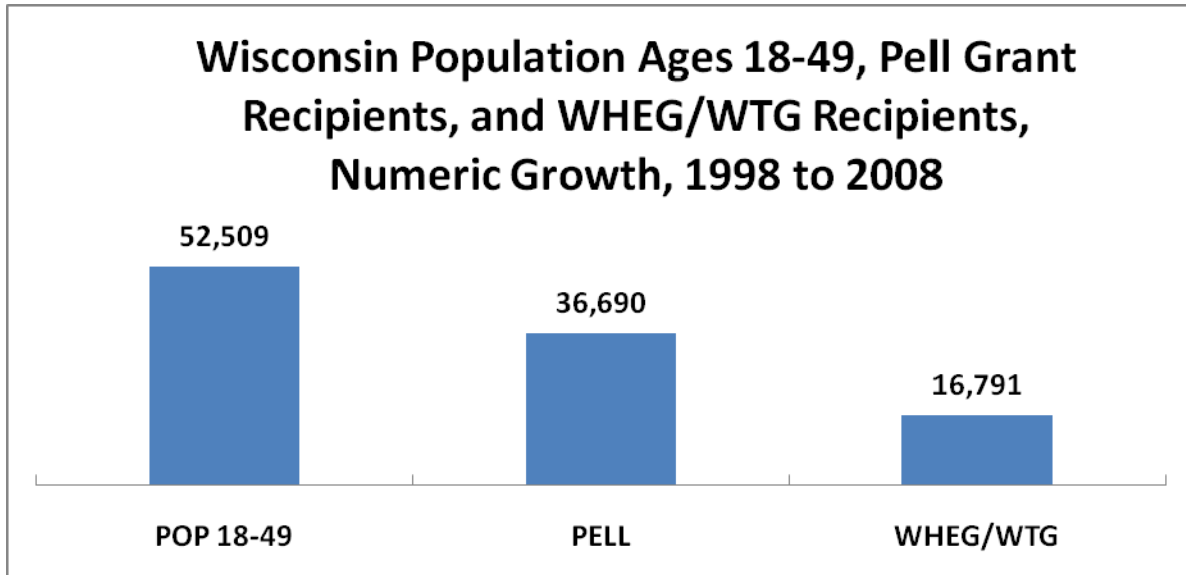
The receipt of a Pell Grant is often used as an indicator of the number of low-income college students, since Pell Grants are means-tested. The number of Wisconsin residents who received a Pell Grant increased by nearly 37,000 people, or 66 percent, between 1998-99 and 2008-09. However, the number of WHEG/WTG recipients did not grow at the same pace - the number of WHEG/WTG recipients increased by about 17,000 or 39 percent (see figure 1).¹⁵ The population growth of Wisconsin residents ages 18 to 49 (this age group accounts for approximately 96 percent of the undergraduate population) from July 1998 to July 2008 was nearly 53,000 people or 2 percent.¹⁶ So the concentration of Pell recipients to Wisconsin residents ages 18 to 49 increased by 1.4 percentage points, while the concentration of WHEG/WTG recipients only increased 0.6 percentage points. Consequently, the gap between the number of Wisconsin residents receiving a Pell Grant and those receiving a WHEG/WTG grant has grown over the last decade (see figure 2).

Some might say that Wisconsin should let "Uncle Sam" worry about student aid, but if we do that, other states will pull ahead.

Other States Surpass Wisconsin in Support for Students

In Minnesota, 9.8 percent of the state's families with children under 18 years old are impoverished. In Wisconsin, the proportion is 11.2 percent.¹⁷ Even though Wisconsin has a higher poverty rate than Minnesota, Wisconsin devotes less to need-based financial aid.¹⁸

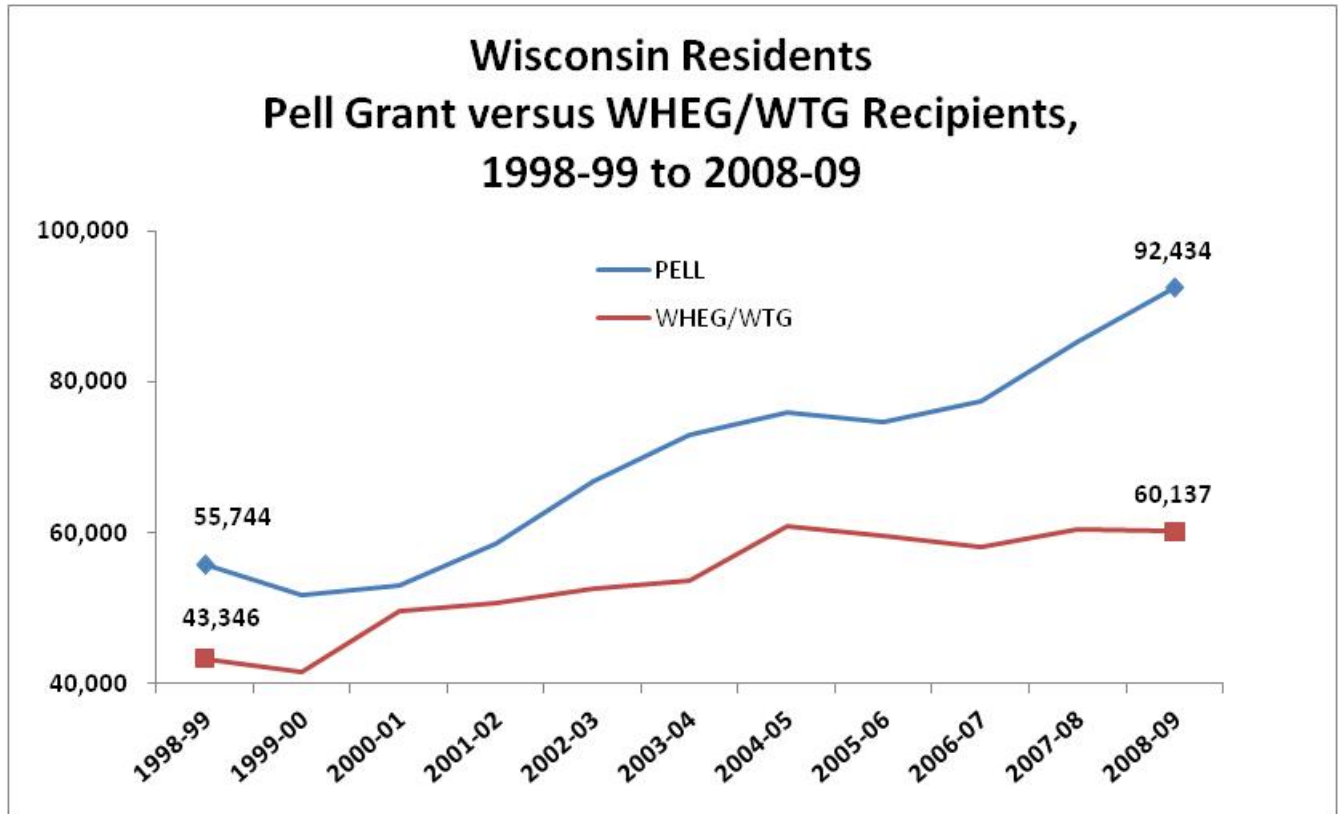
Figure 1



Sources: U.S. Department of Education, *Federal Pell Grant End-of-Year Report*, annual reports 1998-99 to 2008-09; Wisconsin Higher Educational Aids Board, *Wisconsin State Student Financial Aid Data*, annual reports 1998-99 to 2008-09; U.S. Census Bureau, *State Single Year of Age and Sex Population Estimates: April 1, 2000 to July 1, 2009 – CIVILIAN and 1990-2000 Intercensal Estimates*.

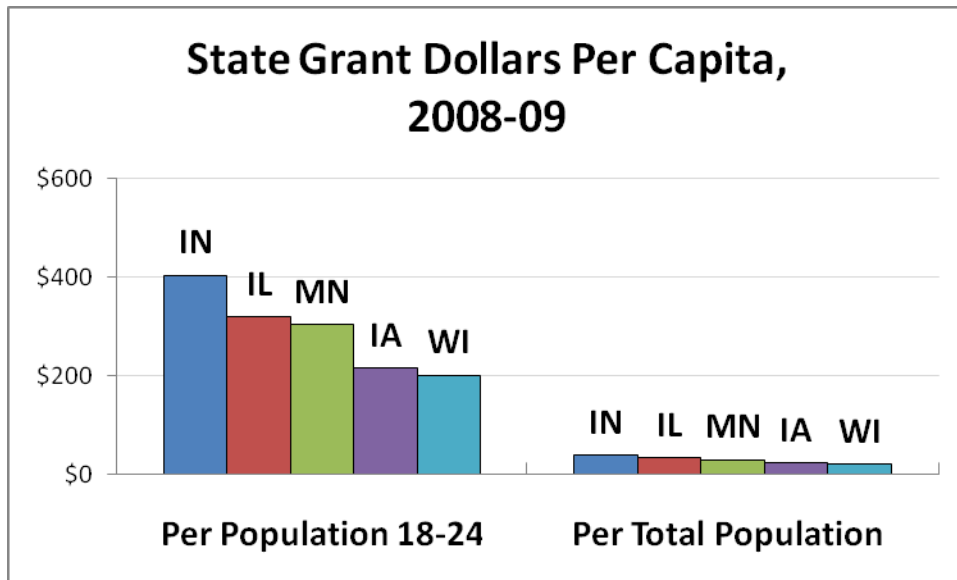
Not only have Wisconsin's student financial aid programs failed to keep pace with the growth in our low-income population, data from the National Association of State Student Grant and Aid Programs (NASSGAP) show that Wisconsin lags its Midwestern neighbors in certain key measures of state commitment to financial aid funding (2008-09 data): (1) state grant dollars per capita (Indiana, Illinois, Minnesota, and Iowa provide more – see figure 3); (2) state grant dollars per population ages 18 to 24 (Indiana, Illinois, Minnesota, and Iowa provide more – see figure 3); (3) need-based grant dollars per undergraduate full-time equivalent (FTE) student (Indiana, Illinois, and Minnesota provide more – see figure 4); (4) total grant dollars per undergraduate FTE student (Indiana, Illinois, and Minnesota provide more – see figure 4); and (5) total state grant expenditures as a percentage of the total state higher education budget (Indiana, Illinois, and Minnesota provide more- see figure 5).¹⁹

Figure 2



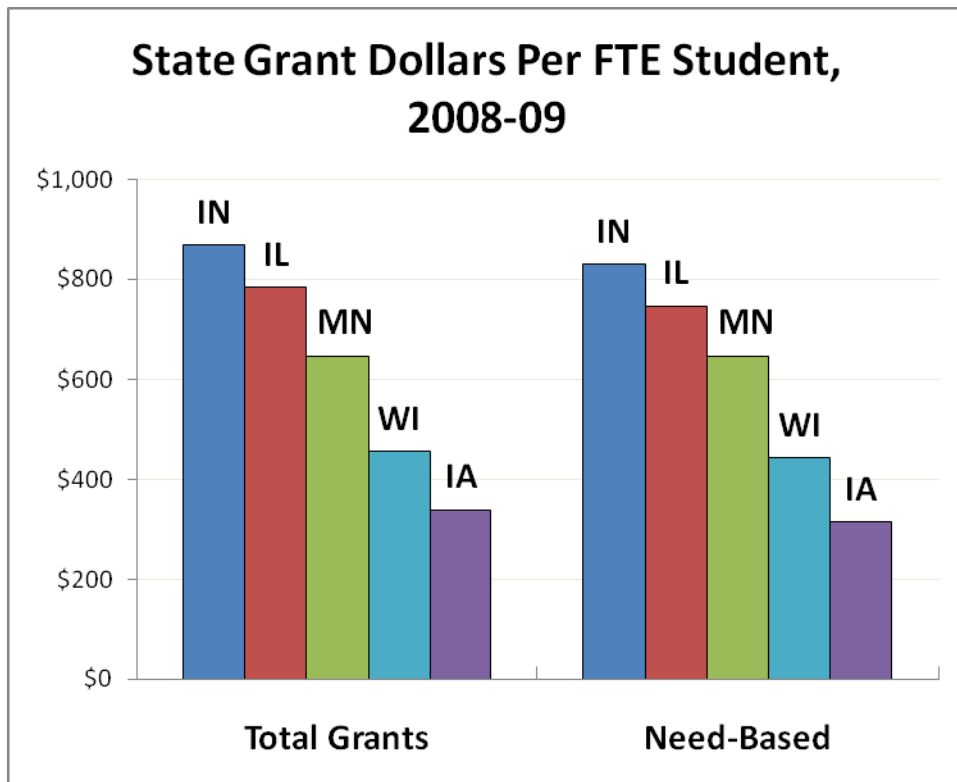
Sources: U.S. Department of Education, *Federal Pell Grant End-of-Year Report*, annual reports 1998-99 to 2008-09 and Wisconsin Higher Educational Aids Board, *Wisconsin State Student Financial Aid Data*, annual reports for 1998-99 to 2008-09.

Figure 3



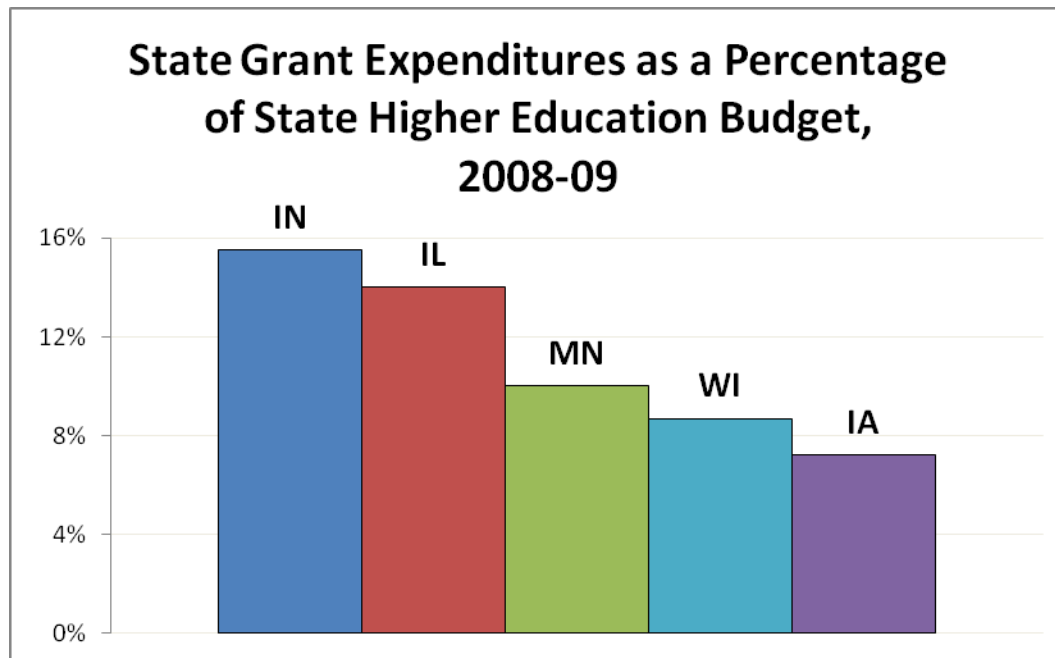
Source: National Association of State Student Grant and Aid Programs, *40th Annual Survey Report on State-Sponsored Student Financial Aid: 2008-2009 Academic Year*, Table 11, 2010.

Figure 4



Source: National Association of State Student Grant and Aid Programs, *40th Annual Survey Report on State-Sponsored Student Financial Aid: 2008-2009 Academic Year*, Table 12, 2010.

Figure 5



Source: National Association of State Student Grant and Aid Programs, *40th Annual Survey Report on State-Sponsored Student Financial Aid: 2008-2009 Academic Year*, Table 14, 2010.

Our neighboring state of Minnesota has many similarities to Wisconsin. Competitive Wisconsin, Inc. has noted that Wisconsin would have to add 170,000 baccalaureate degree-holders to attain Minnesota's level of success in terms of per capita income. I cannot help but notice that Minnesota leads Wisconsin in providing student aid. Minnesota has become our aspirational state. We all want to be above average. When it comes to grant aid to students, Minnesota invests 138 percent of what Wisconsin invests in student grant aid; 149 percent of what Wisconsin invests per state population; 151 percent of what Wisconsin invests per population 18 to 24 years of age; and 142 percent of what Wisconsin invests per full-time equivalent undergraduate student.²⁰

INEQUITABLE GROWTH IN FUNDING FOR WISCONSIN'S MAJOR PROGRAMS

With the economic recession, all higher education sectors in Wisconsin are seeing increased enrollments and demand for financial aid. All students have been subjected to waiting lists for state-funded financial aid, and in many cases earlier in the year than ever before: according to the Higher Educational Aids Board (HEAB) staff (on August 13, 2010), "W" codes were imposed on the following dates for that agency's major programs:

Program	Date wait list imposed
WHEG-Technical College	5/06/10
WHEG-Tribal	5/13/10
Wisconsin Tuition Grant	6/25/10
WHEG-UW	7/28/10

Over the recent years, funding for the HEAB’s three major financial aid programs has grown, but the growth has been inequitable over the last 11 years:

Funding history, WHEG and WTG programs

Year	WHEG- UW	WHEG- TCS	WTG
2000-01	\$18,900,300	\$13,201,900	\$21,038,600
2010-11	<u>\$58,345,400</u>	<u>\$18,797,900</u>	<u>\$26,870,300</u>
\$ increase since 2000-01	\$39,445,100	\$5,596,000	\$5,831,700
% increase since 2000-01	209%	42%	28%

Source: 1999 Wisconsin Act 9; 2009 Wisconsin Act 28.

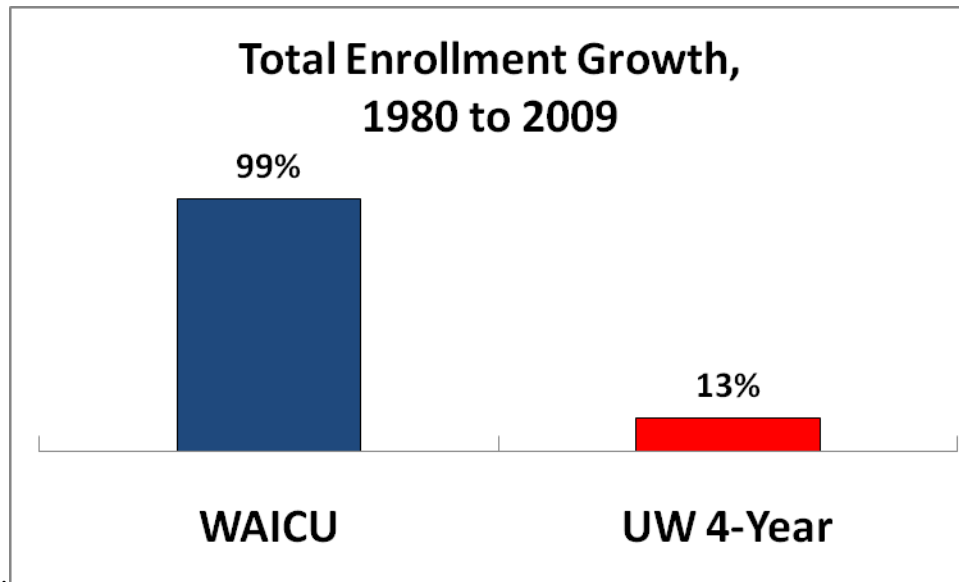
These are all Wisconsin students who are eligible for these programs. Are we to say to a family with three children, one a student at a technical college, one a student at a UW campus, and one a student at one of my members, that one of those students is more deserving than another, based on their college of attendance? We must not forget that there are also a considerable number of students transferring among sectors. Is it fair for a student who qualifies for financial aid in one sector to be disserved by an under-funded appropriation if he or she transfers to an institution in a different sector?

WAICU MEMBERS ARE PLACES OF OPPORTUNITY

WAICU-member colleges and universities were founded to provide educational opportunity to those with precious little. WAICU’s mission is, “Wisconsin’s private colleges—working together to provide educational opportunity.”

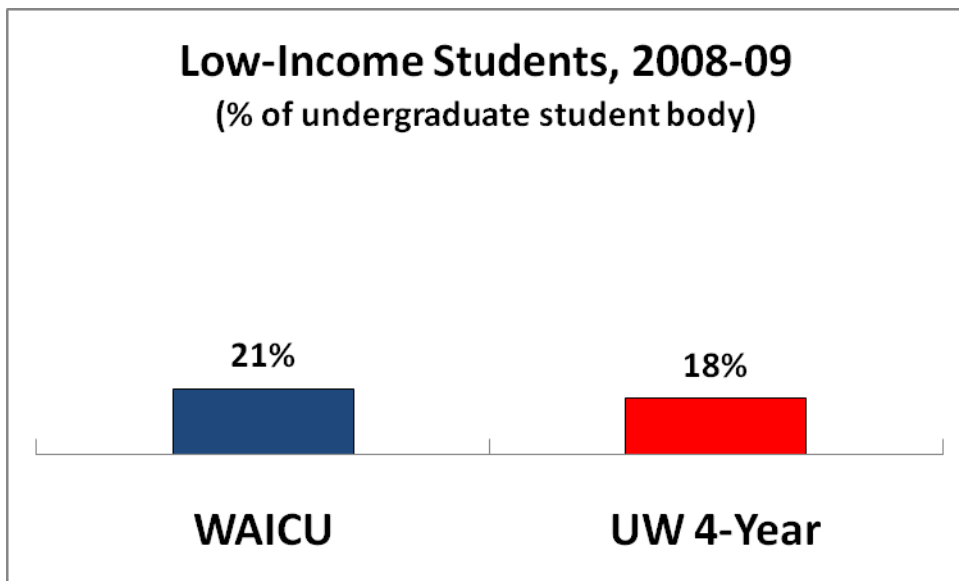
Between 1980 and 2009, total enrollment among WAICU members has increased 99 percent or by 30,188 students, while over the same period UW four-year institutions have grown by 13 percent with the addition of 18,891 students (see figure 6)²¹. More important, WAICU’s undergraduate student body is composed of a larger proportion of low-income, minority, transfer, and adult students (people over age 25) than the UW four-year institutions (see figures 7-10).²²

Figure 6



Source: WAICU calculation using data from the U.S. Department of Education, IPEDS Data Center.

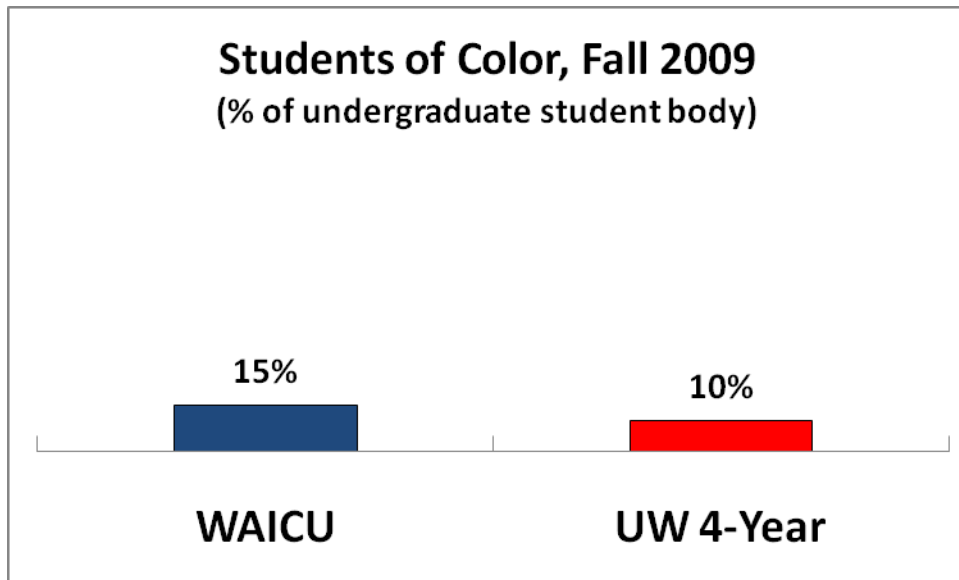
Figure 7



Note: Since Pell grants are means-tested, the percentage of Pell recipients during 2008-09 is used a proxy for low-income. The percentage is calculated as the number of total Pell recipients divided by 12-month undergraduate enrollment during 2008-09.

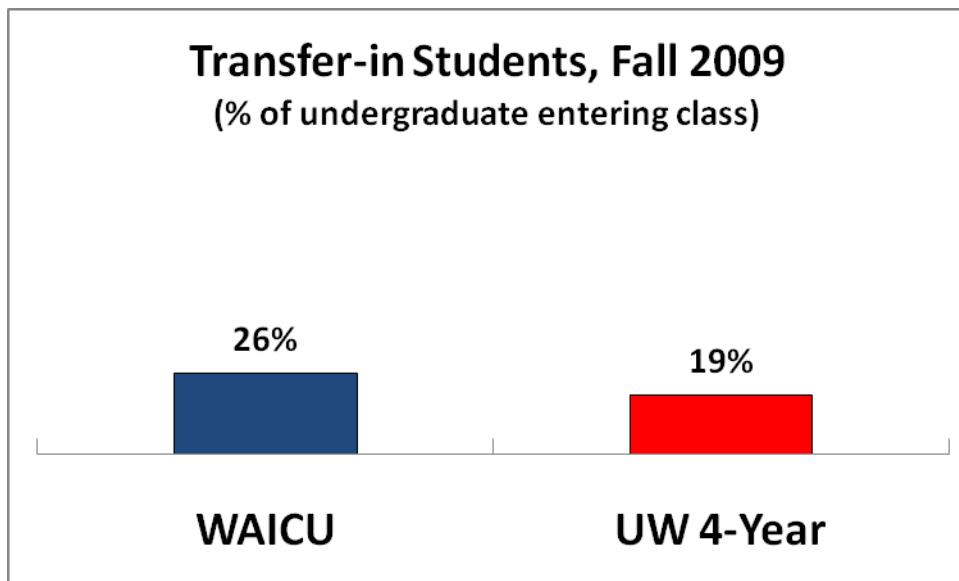
Source: WAICU calculation using data from the U.S. Department of Education, *Distribution of Federal Pell Grant Program Funds by Institution*; and U.S. Department of Education, IPEDS Data Center.

Figure 8



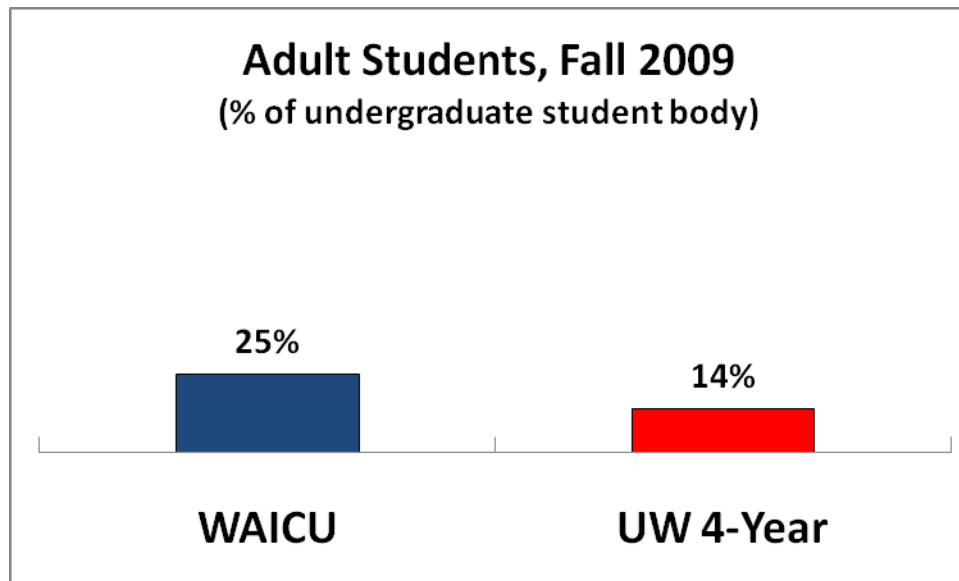
Source: WAICU calculation using data from the U.S. Department of Education, IPEDS Data Center.

Figure 9



Source: WAICU calculation using data from the U.S. Department of Education, IPEDS Data Center.

Figure 10

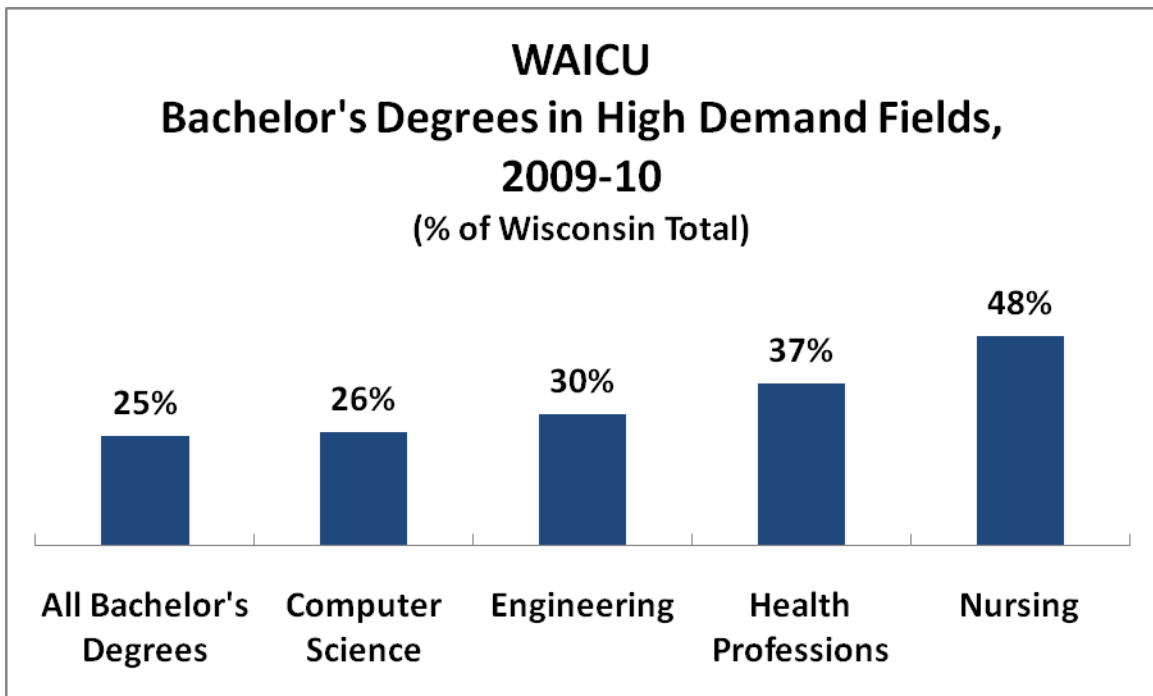


Note: Adult students are defined as being age 25 or older.

Source: WAICU calculation using data from the U.S. Department of Education, IPEDS Data Center.

Although WAICU members produce 25 percent of Wisconsin's bachelor's degrees they produce a disproportionate share of Wisconsin's graduates in "high demand" fields (see figure 11).²³ Wisconsin's private colleges and universities produce 26 percent of the state's graduates in computer science, 30 percent of the graduates in engineering, 37 percent of the graduates in health care fields, and 48 percent of the baccalaureate graduates in nursing (the UW four-year institutions' share is 46 percent, while other colleges and universities account for 6 percent).

Figure 11



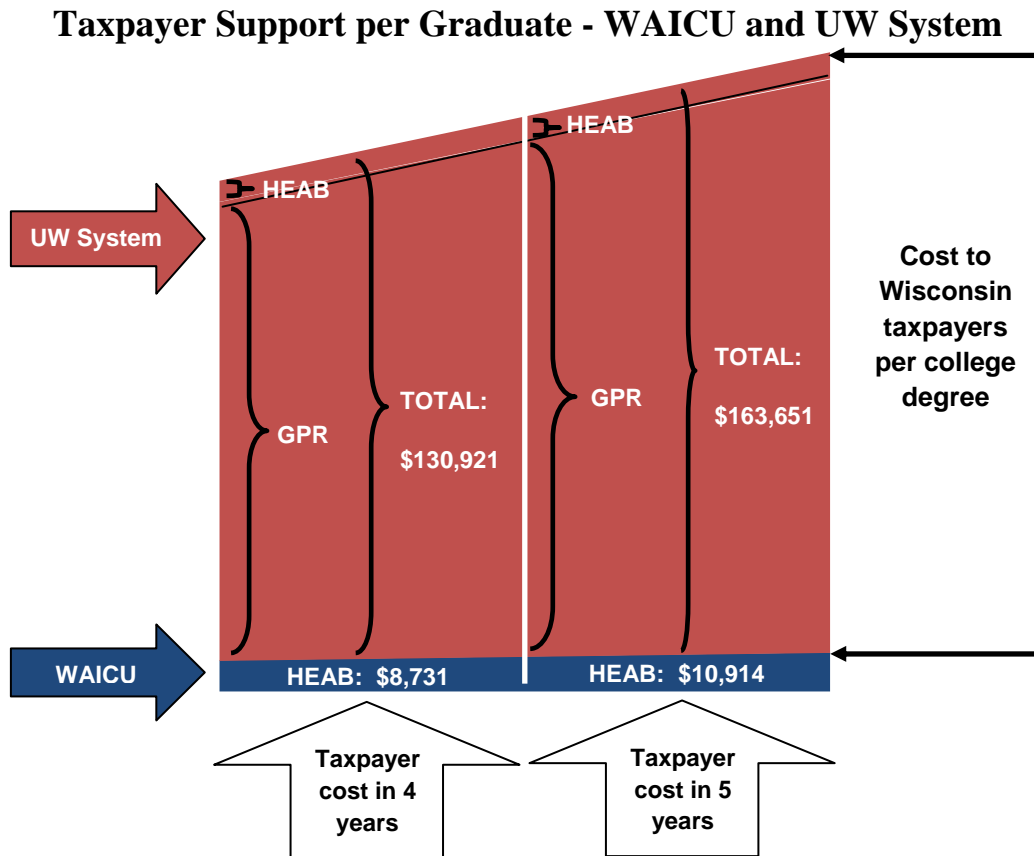
Source: WAICU calculation using data from the U.S. Department of Education, IPEDS Data Center.

PRODUCTIVITY AND COST-EFFECTIVENESS IN USE OF TAXPAYER FUNDS

WAICU members are committed to positioning Wisconsin as a leader in the “Knowledge Economy.” With our colleges’ higher four-year graduation rates and disproportionate production of graduates in high-demand occupational areas including healthcare, Wisconsin’s private colleges are a bargain for Wisconsin taxpayers.

Figure 12 below summarizes Wisconsin taxpayer support allocated in the form of aid to higher education institutions and financial aid directly to students:²⁴

Figure 12



Explanatory Note: The cost per degree is based on an average from 2003-2004 to 2007-2008.

Sources: WAICU calculation based on data from Wisconsin State Biennial Budget Bills (various years); Higher Educational Aids Board, *Student Aid Expenditures* (various years); and Integrated Postsecondary Education Data System, Completions survey (various years).

We do not imagine or imply that we can do it alone. The University of Wisconsin System, Wisconsin's technical colleges, and WAICU members are equally committed, and we must all do our part. The facts show that Wisconsin's private colleges and universities are a cost-effective asset for taxpayers and citizens of Wisconsin and that an investment in student aid for Wisconsin students yields a high return for taxpayers.

ISSUES WITH ALTERNATIVES

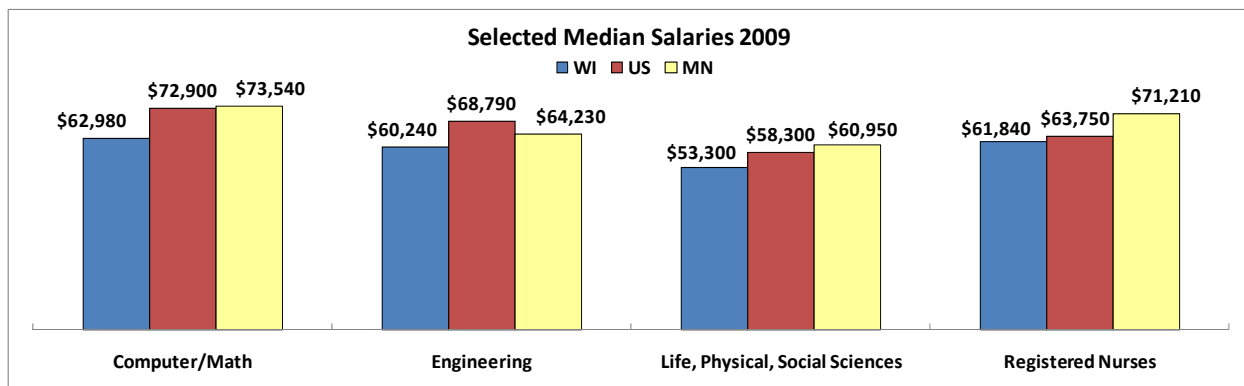
Forgivable loans

Some have proposed that forgivable loans may be a way to increase graduates in key occupations. Unfortunately, the economics of our current situation work against this concept.

The loans forgiven would have to be really large to make a difference to overcome wage differentials in other states. During 2008-09, the average indebtedness of a UW baccalaureate graduate was \$23,789²⁵ while the average indebtedness of a WAICU graduate was \$26,988.²⁶ (It is important to note the UW System figure only includes Wisconsin residents, while the WAICU figure includes all students regardless of state residence. It is likely that out-of-state students have more indebtedness than in-state students.)

For ease of computation, let's say a student would have \$25,000 in debt forgiven at the rate of \$5,000 per year for each year the graduate worked in Wisconsin. However, if this Wisconsin graduate moved across the border to Minnesota, they could in some instances earn up to \$10,000 more, each and every year, than in Wisconsin (see figure 13).²⁷ Due to the salary differential, forgivable loan terms could be an insufficient incentive to keep graduates in Wisconsin. Moreover, forgivable loans may not help people enroll and continue in college because the forgiveness comes in the years after they graduate.

Figure 13



Source: U.S. Department of Labor, Bureau of Labor Statistics, Occupational Employment Statistics, May 2009.

The Tuition/Aid Equation

It has become an “urban legend” that increasing financial aid will provide an incentive for institutions to increase tuition so they can in turn garner even more financial aid. The U.S. Department of Education looked into the matter in 2001, and the Department was unable to find **any** data demonstrating a relationship between tuition increases and federal grants, state grants, or student loans.²⁸

Why Not Import the Educated?

Certainly, in-migration (or reduced outflow) of Wisconsin degree holders is desirable, but no one has yet devised a program that actually works. On the other hand, we do know how to grow our own. If the percentage of graduates retained stays the same within WAICU, the UW, and WTCS, but we grow the number (base) of graduates, Wisconsin will come out ahead.

PRINCIPLES FOR A STUDENT AID PROGRAM THAT WORKS FOR WISCONSIN

1. **Equity:** Wisconsin students qualified to attend a Wisconsin college or university who have demonstrated need should be treated fairly and equitably.
2. **Future Growth:** Waiting lists, “stopping out” due to loss of aid, and uncertainty don’t work for Wisconsin students. A bachelor’s degree takes at least four years. There needs to be a link between tuition and student aid for all sectors (such as is now written into statutes for UW students) so students can plan and graduate on time. (See bill draft in Appendix 2.)
3. **Priority:** The focus needs to be on all Wisconsin students attending a Wisconsin college or university. We are not asking for operating funding for Wisconsin’s private colleges and universities—but we are asking for funding for **all** students. I also want to state emphatically that WAICU never has and never will support taking aid from one group of Wisconsin students and shifting it to another. We stand in solidarity with UW and technical college students (see Appendix 3). All I am saying is, FUND STUDENTS FIRST.
4. **The Time is Now:** Just because Wisconsin is in fiscal trouble now doesn’t mean we should abandon our plans and hopes for the future – indeed if we delay, we jeopardize Wisconsin’s future. We cannot say to our young people, and to the not-so-young—put off your education for another year or two or three or four The more we wait, the dimmer their future and ours. The pace of change in the Knowledge Economy is ever-accelerating. At the present rate of change, Wisconsin—already outpaced by Minnesota—will fall further behind.

ENDNOTES

¹ U.S. Census Bureau, American FactFinder, 2006-2008 American Community Survey 3-Year Estimates, Web, 5 August 2010, <http://factfinder.census.gov/home/saff/main.html?_lang=en>.

² Wisconsin Technology Council, *Vision 2020: A Model Wisconsin Economy*, 2002, Web, 29 July 2010, <http://www.wisconsintechcouncil.com/publications/vision_2020/>.

³ Competitive Wisconsin, Inc., *Goals for Educational Competitiveness*, 2006.

⁴ Lumina Foundation, *Goal 2025: Lumina Foundation's Strategic Plan*, 2009, Web, 29 July 2010, <http://luminafoundation.org/goal_2025/Lumina_Strategic_Plan.pdf>.

⁵ WAICU estimate based on unpublished work conducted in 2009 and 2010 by researchers from WAICU, UW System, Wisconsin Technical College System, Wisconsin Department of Public Instruction and the National Center for Higher Education Management Systems.

⁶ U.S. Census Bureau, *State Interim Population Projections by Age and Sex: 2004 – 2030*, 2005, Web, 5 August 2010, <<http://www.census.gov/population/www/projections/projectionsagesex.html>>.

⁷ Western Interstate Commission for Higher Education, *Knocking at the College Door*, 2008, Web, 4 August 2010, <<http://www.wiche.edu/knocking/data>>.

⁸ WAICU analysis of U.S. Department of Education, IPEDS Fall Enrollment survey data from 1998 to 2008, Web, 4 August 2010, <<http://nces.ed.gov/ipeds/datacenter/>>.

⁹ U.S. Census Bureau, *Census 2000 and 2008 American Community Survey*, Web, 5 August 2010, <<http://factfinder.census.gov>>.

¹⁰ Julia B. Issacs and Timothy M. Smeeding, *The First Wisconsin Poverty Report*, Institute for Research on Poverty, April 2009, Web, 4 August 2010, <<http://www.irp.wisc.edu/>>.

¹¹ Western Interstate Commission for Higher Education, *Knocking at the College Door*.

¹² Bibliographies are available from the Association for the Study of Higher Education at <<http://www.ashe.ws/?page=718>> and the Lumina Foundation at <http://www.luminafoundation.org/research/what_we_know.html>.

¹³ John Bound, Michael F. Lovenheim, and Sarah Turner, *Increasing Time to Baccalaureate Degree in the United States*, National Bureau of Economic Research Working Paper No. 15892, April 2010, Web, 15 April 2010, <<http://papers.nber.org/papers/w15892>>.

¹⁴ U.S. Congressional Advisory Committee on Student Financial Assistance, *The Rising Price of Inequality: How Inadequate Grant Aid Limits College Access and Persistence*, June 2010, Web, 28 June 2010, <<http://www2.ed.gov/about/bdscomm/list/acsfa/edlite-publications.html>>.

¹⁵ U.S. Department of Education, *Federal Pell Grant End-of-Year Report*, annual reports from 1998-99 to 2008-09, Web, 12 August 2010, <<http://www2.ed.gov/finaid/prof/resources/data/pell-data.html>> and Wisconsin Higher Educational Aids Board, *Wisconsin State Student Financial Aid Data*, annual reports for 1998-99 to 2008-09, web, 12 August 210, <<http://heab.state.wi.us/reports.html>>.

The students who received Pell Grants may have attended a post-secondary institution outside of Wisconsin.

¹⁶ U.S. Census Bureau, *State Single Year of Age and Sex Population Estimates: April 1, 2000 to July 1, 2009 - CIVILIAN*, Web, 27 July 2010, <<http://www.census.gov/popest/states/asrh/stasrh.html>> and U.S. Census Bureau, *Intercensal Estimates*, Web, 27 July 2010, <http://www.census.gov/popest/archives/2000s/vintage_2001/CO-EST2001-12/>.

¹⁷ U.S. Census Bureau, American FactFinder, 2008 American Community Survey, Web, 5 August 2010, <http://factfinder.census.gov/home/saff/main.html?_lang=en>.

¹⁸ National Association of State Student Grant and Aid Programs, *40th Annual Survey Report on State-Sponsored Student Financial Aid: 2008-2009 Academic Year*, 2010, Web, 11 August 2010, <http://www.nassgap.org/document_download.aspx?documentID=783>.

¹⁹ National Association of State Student Grant and Aid Programs, *40th Annual Survey Report on State-Sponsored Student Financial Aid: 2008-2009 Academic Year*.

²⁰ National Association of State Student Grant and Aid Programs, *40th Annual Survey Report on State-Sponsored Student Financial Aid: 2008-2009 Academic Year*.

²¹ WAICU analysis of U.S. Department of Education, IPEDS Data Center, Fall Enrollment survey data from 1980 to 2009, Web, 30 July 2010, <<http://nces.ed.gov/ipeds/datacenter/>>.

²² WAICU analysis of U.S. Department of Education, IPEDS Data Center, 12-Month Enrollment survey data for 2008-09, Web, 30 July 2010, <<http://nces.ed.gov/ipeds/datacenter/>>; and U.S. Department of Education, *Distribution of Federal Pell Grant Program Funds by*

Institution 2008-09, Web, 30 July 2010, <<https://ed.gov/inaid/prof/resources/data/pell-institution.html>>.

Since Pell grants are means-tested, the percentage of Pell recipients during 2008-09 is used a proxy for low-income. The percentage is calculated as the number of total Pell recipients divided by 12-month undergraduate enrollment during 2008-09.

²³ WAICU analysis of U.S. Department of Education, IPEDS Data Center, Completions survey data for 2008-09, Web, 15 June 2010, <<http://nces.ed.gov/ipeds/datacenter/>>.

²⁴ WAICU calculation based on data from Wisconsin State Biennial Budget Bills (various years); Higher Educational Aids Board, *Student Aid Expenditures* (various years); and U.S. Department of Education, IPEDS Data Center, Completions survey (various years).

²⁵ UW System Informational Memorandum, *Student Financial Aid: 2008-09 Update*, January 2010, Web, 20 May 2010, <http://www.uwsa.edu/opar/orb-im/im/fin_aid/fa08-09.pdf>.

²⁶ WAICU, *WAICU Institutional Survey 2009-2010*, unpublished, May 2010.

²⁷ U.S. Department of Labor, Bureau of Labor Statistics, Occupational Employment Statistics, May 2009, Web, 30 July 2010, <<http://stats.bls.gov/oes/current/oessrcst.htm>>.

²⁸ U.S. Department of Labor, National Center for Education Statistics, *Study of College Costs and Prices, 1988-89 to 1997-98 (Volume 1)*, 2002-157, December 2001, Web, 2 August 2010, <<http://nces.ed.gov/pubs2002/2002157.pdf>>.

APPENDIX 1

Selected Wisconsin Tuition Grant students featured in the *WTG Achievers* newsletter.

WTG *Achievers*

Vol. 8, No. 10

May 2008

About the WTG

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Rolf Wegenke, Ph.D.
President & CEO
Mari McCarty, Ph.D.
Executive Vice President
Paul Nelson
Senior VP for Public Policy

WTG helps Stritch student become a leader



Nikia Davis of Milwaukee, a junior at Cardinal Stritch University

Nikia Davis kept to herself and spent a lot of time alone in her room during her freshman year at Cardinal Stritch University. She had a high grade point

average in high school and wanted to continue to push herself to excel at Stritch.

"I came to Stritch with the same attitude," said Nikia, who focused primarily on academics and internship opportunities, rather than extracurricular activities, while a student at Milwaukee's James Madison High School and then at the New School for Community Service. "I'll get the good grades, and I'll get out of here. I'm not getting involved in anything. I don't have time for that. Well, that changed."

Now in her fourth year at Stritch with a double

major in psychology and communications, Nikia serves as president of the Black Student Union, is a resident assistant, works as co-manager of the residence hall front desk, and served as an orientation leader for three years. She credits Jenni Kiekow, Stritch's director of Student Leadership and Involvement, for giving her the nudge she needed to realize her leadership potential.

"She's one of the larger influences in my getting involved," Nikia said. "She would ask me to do stuff or tell me about things she thought I'd be interested in."

CONTINUED ON PAGE 2

Northland student maintains academic focus in the face of challenges With aid from WTG,



Jen Chen of Ashland, a senior at Northland College

Jen Chen, a senior majoring in sociology at Northland College in Ashland, is not your run-of-the-mill college student. In fact, Jen has always taken her own

path, and now the Wisconsin Tuition Grant is helping her continue to follow it.

Originally from California, Jen had moved with her mother nine or ten times (she can no longer remember the exact number) before she even started high school. By the time she graduated from high school in 1997, she wasn't interested in going to college right away. Instead, she jumped at an opportunity to travel. For a little less than a year, she lived on a kibbutz in the Negev Desert in southern Israel.

"It was quite a wonderful experience," says Jen. "But I

knew I had to come back and start my college career."

Jen was drawn by the promise of an environmentally focused education, and first enrolled at Northland College in the fall of 2000. She was involved in a variety of campus activities including a grassroots organization that encouraged students, trustees, faculty and administration to stick to their environmental ethics in all things and in all ways possible.

After two and a half years at Northland, Jen had a daughter. For a while, she tried to juggle the pressures of school,

CONTINUED ON PAGE 2

NIKIA DAVIS CONTINUED FROM PAGE 1

Despite her involvement and leadership roles, Nikia continues to earn good grades. While her career goals fluctuate at times, she hopes to get experience in advertising, public relations, or event planning once she graduates in 2009 before going back to school for advanced degrees in counseling and clinical psychology. One day she envisions opening her own practice as a family psychologist.

“My plans change every day,” Nikia said with a laugh.

As the first in her family to pursue a bachelor’s degree, Nikia appreciates the love of her family and said her success would not be possible without their support.

“My family has had a big part in getting me where I am,” Nikia said. “Friends and relationships can come and go, but for the most part, it’s been my family, and especially my

grandmother, who have been key to my success. They help me keep my head up and encourage me; they are with me, behind all my decisions, no matter what they are.”

Nikia is grateful that she could go to school so close to home (“yet not too close”), and said part of her decision in choosing Cardinal Stritch University was the favorable and easy-to-understand financial aid package she received, which includes a scholarship, a federal subsidized loan, and grants, including the Wisconsin Tuition Grant.

Beyond all the things she’s learning at Stritch, the activities she is enjoying, and the people she has met, Nikia said her greatest achievement is “just being me and growing as a woman, since it’s so hard to do . . . Just growing and knowing what I’m good at and not good at. It’s knowing what I have to work at and just progressing from year to year.”

FACT OF THE MONTH

The return on higher education is increasing. In 1980, each year of college raised a person’s wage by 7.6 percent. In 2005, each year of college yielded an additional 12.9 percent.

Claudia Goldin and Lawrence F. Katz, The Race Between Education and Technology (Harvard University Press, 2008)

JEN CHEN CONTINUED FROM PAGE 1

parenthood, and work, but the schedule became too much to handle.

“I decided I would have to put my education on hold for a while,” says Jen. “Four and half years later, I’m back in school and absolutely loving it! Now that I am older, I feel like I have a much better grasp on my education. I have a goal and I aim to achieve it. In May of 2009, I will graduate with a bachelor’s degree in sociology.”

College hasn’t always been easy for Jen, as she deals with the demands of parenting, classwork, and her job at a local restaurant,

but she has managed to keep her academic focus—even in her most difficult course, statistics—while dealing with the other things happening in her life. She credits the faculty at Northland with helping her overcome obstacles and maintain a balance in the face of everyday challenges.

“I love the professors here,” Jen says. “They bring such a mixture of intellect and education to this school and continue to inspire young minds year after year. The faculty are what makes this an amazing place to learn.”

After graduation, Jen plans to find a job

that will allow her to work in Wisconsin with women and children in crisis—people dealing with domestic violence and sexual assault. She also plans to pursue a graduate degree in the same field; she hopes this will be possible in the near future.

“I am very thankful for the assistance I have received,” she says. As a student without any financial assistance from parents, Jen has found the support of the Wisconsin Tuition Grant and other financial aid to be crucial. It has given Jen opportunities she would not have had on her own—namely, the opportunity to keep walking her own path.

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WTG *Achievers*

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June 2008

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WTG helps first-generation Marquette student



Katy Klinnert-Leukam of Waukesha, a junior at Marquette University

As a full-time student with a young daughter, an internship, a part-time job, and a leadership role on campus, Katy Klinnert-Leukam is always busy at Marquette. She is grateful to

the Wisconsin Tuition Grant for helping to make her educational goals a reality.

Katy always wanted to attend Marquette, but as a first-generation college student, she worried that her hopes were too "unrealistic." She began her undergraduate studies elsewhere but realized she did not want to give up on her dream of going to Marquette. She transferred to Marquette in the fall of 2006.

Since arriving on campus, Katy has felt welcomed by the students, faculty, and staff and is pleased to have found her place. "My favorite part has been the people," says Katy, who has been particularly

impressed with the university's faculty. Dr. Ulrich Lehner, assistant professor of theology, taught Katy's introductory theology course and is one of her favorite professors. It was Dr. Lehner's "ability to involve everybody regardless of their background" that impressed Katy.

She also finds the challenging coursework to be rewarding, admitting that Marquette is "harder work" than the other schools she has attended. Katy is majoring in public relations, but decided "to get creative" and develop her own interdisciplinary minor. Under

CONTINUED ON PAGE 2

WTG recipient at Wisconsin Lutheran College puts education to civic use



Maria Flores of Cudahy, a sophomore at Wisconsin Lutheran College

Wisconsin Tuition Grant recipient Maria Flores is a busy sophomore at Wisconsin Lutheran College, but she is far from the "typical" student

she may appear to be. Maria is distinguished by the fact that she is also an elected public servant. In her after-school job, she serves as a member of the school board in Cudahy, Wisconsin.

During her freshman year of college, Maria, an education major, learned about a way of educating students to help them develop a sense of worth based on things such as trustworthiness and honesty. Instead of limiting her discovery to the classroom, Maria realized she could use this education concept to help make a difference in her own community of Cudahy, so she decided to run for the school board.

Maria's campaign emphasized the idea of character education and good citizenship. She pointed out that she was a strong candidate because she is a current student and she was recently in high school in Cudahy.

Maria's commitment and sense of civic responsibility impressed her fellow citizens, and she was elected to the Cudahy school board in April 2007. She worked hard to bring herself up to speed on all the issues before the board, and she says she has already learned so much, particularly about budgets, contracts, and unions.

CONTINUED ON PAGE 2

KATY KLINNERT-LEUKAM CONTINUED FROM PAGE 1

the guidance of Linda Menck, professional in residence in Marquette’s J. William & Mary Diederich College of Communication, Katy created a minor that combines studies in corporate communication, graphic design, and management.

Katy hopes that this combination of studies will help prepare her for a career in public relations for nonprofit organizations after she graduates in the spring of 2009. She knows firsthand about work in the nonprofit sector; before coming to Marquette, she worked for The Life Is for Everyone (L.I.F.E.) Coalition, speaking about her experience as a young mother, hoping to educate others and make a difference in their lives.

Katy continues to benefit from hands-on work experience at her internship at FOCUS Training, a leadership development company in downtown Milwaukee. She works in the sales and marketing department and enjoys being able to apply what she is learning in the classroom to the real world. She also continues to work part-time as an

independent beauty consultant with Mary Kay Cosmetics. She began working for the company three years ago and has since been given a leadership position, serving more than 200 customers and earning the use of a company car.

Despite her busy schedule, Katy still finds time to be active on campus. She was elected to the Marquette University Student Government as a commuter senator during her first year on campus. Running on the platform “creating change,” Katy described her vision for Marquette, listened to students, and asked for their suggestions. She now serves on the Student Life Committee, ensuring that students’ needs are met on campus.

Katy is making the most of her time at Marquette. During her first year on campus, she worked hard to pay for school but needed help. The assistance of the Wisconsin Tuition Grant, in addition to Marquette’s Ignatius Scholarship, a Pell Grant, and several loans, enables her to arrive at a better balance of time for family, school, and work.

FACT OF THE MONTH

According to the U.S. Advisory Committee on Student Financial Assistance, up to 3.2 million college-ready students will forgo a bachelor’s degree this decade because of financial barriers.

“Mortgaging Our Future: How Financial Barriers to College Undercut America’s Global Competitiveness,”
2008 update

MARIA FLORES CONTINUED FROM PAGE 1

Now she’s bringing her newfound knowledge back to Wisconsin Lutheran College to enhance her education and encourage fellow students. Maria is happy to be able to contribute to her classmates’ learning experiences. Because Wisconsin Lutheran is a small college, Maria welcomes the opportunity to participate in more in-depth discussions during class periods.

Maria’s experience and knowledge of how schools run not only helps her in the college classroom, but also while performing her student teaching responsibilities. Wisconsin Lutheran’s education program is devoted to

allowing its students to get as many hands-on experiences as possible.

Maria is thankful that her Wisconsin Tuition Grant relieves some of the stress of completing her college education. She is able to load up on credits in order to earn her teaching credential as soon as possible, rather than taking fewer classes in order to work more to pay for her credits. Without the WTG, she is afraid she would be in school forever while working extra hours to finance her education.

After graduation, Maria plans to be a teacher, and eventually hopes to become

a principal. She encourages fellow students to pursue their dreams. “You just need to do it,” she says. “You can’t be afraid of anything because you never get opportunities back.”

Despite her busy schedule, Maria keeps her priorities at the forefront. After the polls closed on election night and Maria was declared the winner, reporters called her at home to find out how she was celebrating. Maria said she was working on her Spanish homework. The Wisconsin Tuition Grant has provided a student dedicated to learning with the opportunity to excel far beyond the classroom.

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WTG Achievers

Vol. 9, No. 3

October 2008

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Iraq vet uses WTG to follow nursing dream



Jason Diaz of Cottage Grove, a junior at Edgewood College

When you think “nursing student,” it’s entirely possible Jason Diaz wouldn’t come to mind. The Cottage Grove native has traveled quite a road

to get to where he is today, one that has challenged him in ways most of us will never experience.

Jason was in the U.S. Army Rangers for more than eight years, and served in Operation Iraqi Freedom. He says he’s always been interested in the medical field (his mother works in healthcare in Madison) but didn’t serve as a medic in the military. Rather, he was a squad leader, in charge of the lives of nine soldiers. And it was while he was deployed in Iraq that one experience in particular set him on the path that led to him to Edgewood College.

On that mission, he says, one of his fellow soldiers from another squad was badly wounded in a firefight. “I didn’t panic,” he recalls. “I just reacted in a way that seemed like second nature.” Jason was able to help keep his comrade alive long enough to reach safety and medical care. All the soldiers in his squad returned home from their tour. “That’s one thing I’m very proud of. The nine guys I went over there with—nobody came home with a scratch. They were all alright when they got home—that was the promise I made to each one of their mothers before I left.”

CONTINUED ON PAGE 2

“Role model” for siblings gets helping hand from Wisconsin Tuition Grant



Abby Brueggen of Cashton, a senior at Viterbo University

When Abby Brueggen goes to classes it’s almost like family is right alongside her. Coming from a family of nine, Abby understands how important her

Wisconsin Tuition Grant has been both in paying for her education and reducing the financial stress on her parents.

“I’m the oldest child in my family, and a role model for my younger siblings,” she said. “I have a 3.3 GPA and made the dean’s list. They really look up to me when they see how well I’m doing.”

Since arriving on the Viterbo campus, 21-year old Abby has been busy. She serves as a campus tour guide and participates on the campus activities board, symphonic band, the rugby team, and campus ministry.

Scheduled to graduate in 2010, Abby has an extensive list of extra-curricular activities, but she still finds time for the demanding academic schedule that comes with a double major in digital media and graphic design.

The decision to attend Viterbo University was definitely the right one for her, she said.

“I’m very happy here,” said the senior. “I chose Viterbo because of the small college atmosphere. There were only 38 kids in my high school class, so Viterbo was a perfect fit. The people at Viterbo are friendly and the small

CONTINUED ON PAGE 2

JASON DIAZ CONTINUED FROM PAGE 1

Jason started his education at a large public university, but says “something about it wasn’t compatible with me and my learning style.” A friend suggested Edgewood College. Thanks to a financial aid package that included the Wisconsin Tuition Grant, Jason was able to make that idea a reality.

He transferred, came for his first semester, and says “it was the best thing I ever did.” A smaller community was exactly what he was looking for. “The biggest surprise for me when I came here was that during my first class, the instructor gave me his home phone number, and said ‘any questions, any time, give me a call. Just as long as it’s not during my favorite show,’ and that blew my mind.”

Jason says the value of his decision to come to Edgewood College shows in his GPA. “To me that was the deciding factor—this was the fit for

me.” And it is his academic performance—and his life experience—that makes him a perfect fit for the school’s very selective nursing program. He says his military experience tested him mentally, physically, and emotionally. Jason says facing those challenges—especially in what he calls the ‘fragile and hostile environment’ of conflict—will serve him well in his career ahead.

“Going through this program can be intimidating for some,” Jason says. “There’s a lot of work at certain times in the field itself. People are depending on you. So that’s the way I handle myself and approach things—people can tell that I’ve had life experiences that have trained me to be in this situation. Every path taken and bridge crossed in my life has led to this point.”

In addition to his coursework at Edgewood, Jason also works at Dean Clinics in Madison as a phlebotomist/EKG technician.

FACT OF THE MONTH

Increased education leads to higher voting rates. In the 2006 Congressional election, 61% of citizens with bachelor's degrees voted, compared to only 40% of citizens who ended their education after high school.

U.S. Census Bureau

ABBY BRUEGGEN CONTINUED FROM PAGE 1

class sizes really appeal to me. The faculty here are awesome. I have plenty of one-to-one time with my professors. When I have questions they are always willing to help.”

One of the most memorable experiences Abby had at Viterbo was participating in a campus ministry service trip to the Gulf Coast to help the victims of Hurricane Katrina. Along with nearly 40 other Viterbo students, Abby spent her spring break helping residents clean up after the devastating flood.

“I saw it as a way to give back to society,

and I shared the story by speaking to a class at a local high school.”

Like many young people, Abby, a senior from Cashton, was concerned about financing her college education when she enrolled at Viterbo University.

Abby is one of many Wisconsin students whose college education is made possible through the Wisconsin Tuition Grant. A large percentage of Viterbo’s students are first-generation college students, which often makes this type of financial aid even more important.

“The WTG is a critical part of the financial aid package for many of our resident students,” said Terry Norman, Viterbo University’s director of financial aid. “Over 550 Wisconsin residents received more than 1.5 million dollars in WTG funding in 2007–08, with an average award of \$2,725. The WTG is the fourth largest grant program awarded at Viterbo University. Without this grant, most of those 550 students could not attend college, or would be forced to borrow excessively to fund their college education.”

Abby’s glad she’s among those able to follow her dreams of a college education.

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Lawrence student brings hope to children in Haiti

It's a close call as to whose education Oliver Zornow was more involved in during the past four years: his own, or those of children in Haiti.

While juggling the rigors of attending Lawrence University, the Appleton native simultaneously worked tirelessly to establish an elementary school in the poverty-stricken Caribbean nation.

"I went to Haiti in 2006 to experience what life was like



Oliver Zornow (left), of Appleton, meets with teachers and students at School of Grace of Caneille in Haiti.

for people living in extreme poverty," said Oliver. "I never imagined what I saw would affect me the way it did." Oliver knew he had to do

decide. He set about to build a school in rural Caneille, 50

something to change the lives of the children he met. A World Bank report citing education as the single most important determinant of an individual's potential to escape poverty helped him

continued on page 2

Sisters find success at Stritch with help from WTG

It wasn't Beth Streed's intention to follow her sister to Milwaukee's Cardinal Stritch University.

"I've always been known as Michelle's little sister, so I didn't want to go to Stritch at all," said Beth, who is 12 months younger than her older sibling.

However, a weekend visit with Michelle, attending classes and interacting with the Cardinal Stritch community, quickly changed Beth's mind.

"They were so friendly and welcoming," Beth said. "It felt



Sisters Beth and Michelle Streed, of Greendale, found a second home at Cardinal Stritch University.

a lot like home."

Now the sisters are poised to graduate from Stritch in 2011—Michelle in May and Beth in December—but each

has found her own individual path toward success.

A secondary education and English double major, Michelle hopes to teach in an urban school. She has been a resident

assistant, orientation leader, and campus ministry volunteer. Michelle has also traveled to Italy for a

continued on page 2

Oliver Zornow continued from page 1

miles from Port-au-Prince.

Oliver embarked on a series of fundraisers to launch his project. By that fall, as he was entering Lawrence as a freshman, 130 Haitian children were greeted as the first students of Zornow's School of Grace of Caneille. Today the school boasts 150 students in six grades.

Although the school still stood after the earthquake, its situation became precarious due to the overwhelming needs of so many thousands of people around it. Price shocks, not earthquake aftershocks, created more challenges. A refugee camp that sprang up near the school after the quake added 23 new students, straining an already tight budget.

"We are very frugal in our operation," said the government and economics major. "People donate much of what we need, including server space to maintain a website."

While overseeing the school, Oliver often cut back on sleep to support his own educational expenses, working several part-time jobs in addition to his class demands.

"As a first-generation college student, I couldn't have attended Lawrence without the support of programs like the Wisconsin Tuition Grant," said Oliver. "One of the reasons I attended Lawrence was the financial aid I received. The WTG is certainly an important part of that."

With a post-graduation Peace Corps assignment to Africa awaiting, Oliver says School of Grace will remain an integral part of his life.

"This is pretty much a lifetime commitment. I don't see how I could push it off. I hope to always remain involved in some capacity."



In 2009, thirty percent of the people of color who graduated with a bachelor's degree in Wisconsin did so at a private college. In the Milwaukee area, it was nearly sixty percent.

Source: National Center for Education Statistics

Michelle and Beth Streed continued from page 1

Franciscan Leadership Pilgrimage and New York as a Habitat for Humanity volunteer. In addition, she works in Stritch's admission office.

A biology major, Beth has found her own place at Stritch as she prepares to become a physician's assistant. She is often in the newly renovated science labs or in the admission office, where she handles open houses and campus visit days, serves as a tour guide, and works at the Stritch welcome desk.

Living in their different worlds on the same campus, Beth said she and Michelle are so

busy that they have to actually plan time to see each other, so rarely do their paths cross.

"At first, we were nervous when we both ended up coming here," Michelle said. "Yet we've been able to have our own things happening, so it worked out. And it's not like one is overshadowing or crowding the other."

They know that neither of them could have succeeded at Cardinal Stritch without a generous financial aid package, including the university's Honors Scholarship and the Wisconsin Tuition Grant.

Growing up in a single-parent household, the sisters understand the value of hard work and perseverance, and they are thankful for the financial aid that has allowed them to make the best choice for each of them.

"I'm so grateful for it," said Michelle of the grant. "Without this kind of help with my education, there might have been a lot of things I wouldn't have been able to do—like go to my dream school. Stritch has really helped me grow." Those who know the sisters are confident they are "haven't seen anything yet."

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APPENDIX 2

Model legislation for equitable financial aid funding growth.

2007 SENATE BILL 450

1 **AN ACT** *to amend* 20.235 (1) (b), 20.235 (1) (fe), 20.235 (1) (ff), 20.235 (1) (km),
2 20.285 (4) (dd), 20.505 (8) (hm) 10., 36.34 (1) (c) 2. (intro.), 36.34 (1) (c) 2. am.,
3 36.34 (1) (c) 2. b., 36.34 (1) (c) 2. bm., 39.435 (7) (b) (intro.), 39.435 (7) (b) 2. and
4 39.435 (7) (b) 2m.; and *to create* 36.34 (1) (c) 2. ag., 36.34 (1) (c) 2. ar., 39.30 (5),
5 39.435 (7) (a) 3., 39.435 (7) (a) 4., 39.435 (7) (a) 5., 39.435 (7) (a) 6., 39.435 (7)
6 (b) 1g., 39.435 (7) (b) 1r., 39.435 (7) (c) and 39.435 (7) (d) of the statutes; **relating**
7 **to:** the method by which the amounts to be appropriated for higher education
8 grants, tuition grants, and Lawton minority undergraduate grants are
9 calculated and making appropriations.

Analysis by the Legislative Reference Bureau

Under current law, the Higher Educational Aids Board (HEAB) provides higher education grants to Wisconsin residents who are enrolled in the University of Wisconsin (UW) System, a technical college, or a tribal college and tuition grants to Wisconsin residents who are enrolled in accredited, nonprofit post-high school, educational institutions in this state. The Board Regents of the UW System provides grants, known as Lawton grants, to minority undergraduates enrolled in the UW System.

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Currently, sum certain amounts are appropriated in each fiscal year for tuition grants and for higher education grants for technical college and tribal college students. For higher education grants for UW System students, beginning with the 2009–11 state fiscal biennium, there is appropriated a sum sufficient equal to the amount appropriated for those grants in the previous fiscal year (base amount) increased by the average percentage by which the undergraduate academic fees that will be charged for the next academic year at each institution within the UW System, as estimated by HEAB, will increase from the undergraduate academic fees charged for the current academic year. The same formula is also used to calculate the amount appropriated for Lawton grants.

This bill changes the formula used to calculate the amounts appropriated for higher education grants for UW System students and for Lawton grants. The bill also requires HEAB to use the new formula to calculate the amounts appropriated for tuition grants and for higher education grants for technical college and tribal college students. Specifically, under the bill, beginning with the 2009–11 state fiscal biennium, the amounts appropriated for tuition grants, for Lawton grants, and for higher education grants for UW System students, technical college students, and tribal college students are determined by increasing the base amount for each of those appropriations by the greater of the average percentage increase determined under current law or the amount obtained by multiplying the increase in the undergraduate academic fees that will be charged for a student to attend the UW–Madison for the next academic year, as estimated by HEAB, over the current academic year by the number of students who are receiving the respective grants for the current academic year.

For further information see the *state* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

1 **SECTION 1.** 20.235 (1) (b) of the statutes is amended to read:

2 20.235 (1) (b) *Tuition grants.* ~~Biennially, the amounts in the schedule A sum~~
3 ~~sufficient equal to the amount calculated under s. 39.30 (5) for the purposes of s.~~
4 ~~39.30.~~

5 **SECTION 2.** 20.235 (1) (fe) of the statutes, as affected by 2007 Wisconsin Act 20,
6 is amended to read:

7 20.235 (1) (fe) *Wisconsin higher education grants; University of Wisconsin*
8 *System students.* ~~A sum sufficient equal to \$50,000,000 in the 2007–08 fiscal year,~~

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1 equal to \$55,000,000 in the 2008–09 fiscal year, and equal to the amount calculated
2 under s. 39.435 (7) (b) for the Wisconsin higher education grant program under s.
3 39.435 for University of Wisconsin System students, except for grants awarded
4 under s. 39.435 (2) or (5), thereafter.

5 **SECTION 3.** 20.235 (1) (ff) of the statutes is amended to read:

6 20.235 (1) (ff) *Wisconsin higher education grants; technical college students.*
7 ~~Biennially, the amounts in the schedule A sum sufficient equal to the amount~~
8 ~~calculated under s. 39.435 (7) (c) for the Wisconsin higher education grant program~~
9 ~~under s. 39.435 for technical college students, except for grants awarded under s.~~
10 ~~39.435 (2) or (5).~~

11 **SECTION 4.** 20.235 (1) (km) of the statutes is amended to read:

12 20.235 (1) (km) *Wisconsin higher education grants; tribal college students.*
13 ~~Biennially, the amounts in the schedule A sum sufficient equal to the amount~~
14 ~~calculated under s. 39.435 (7) (d) for the Wisconsin higher education grant program~~
15 ~~under s. 39.435 for tribal college students, except for grants awarded under s. 39.435~~
16 ~~(2) or (5). All moneys transferred from the appropriation account under s. 20.505 (8)~~
17 ~~(hm) 10. shall be credited to this appropriation account. Notwithstanding s. 20.001~~
18 ~~(3) (b), the unencumbered balance on June 30 of each odd-numbered year shall~~
19 ~~revert to the appropriation account under s. 20.505 (8) (hm).~~

20 **SECTION 5.** 20.285 (4) (dd) of the statutes is amended to read:

21 20.285 (4) (dd) *Lawton minority undergraduate grants program.* A sum
22 sufficient equal to \$5,218,300 in the 2005–06 fiscal year and \$5,531,400 in the
23 2006–07 fiscal year, and in subsequent fiscal years a sum sufficient equal to the
24 amount calculated under s. 36.34 (1) (c), for the Lawton minority undergraduate
25 grant program under s. 36.34 (1).

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1 **SECTION 6.** 20.505 (8) (hm) 10. of the statutes is amended to read:

2 20.505 **(8)** (hm) 10. The amount transferred to s. 20.235 (1) (km) shall be the
3 amount in the schedule under s. 20.235 (1) (km) as calculated by the higher
4 educational aids board under s. 39.435 (7) (d).

5 **SECTION 7.** 36.34 (1) (c) 2. (intro.) of the statutes is amended to read:

6 36.34 **(1)** (c) 2. (intro.) ~~Beginning in 2007, biennially, by~~ By February 1, 2009,
7 and biennially thereafter, the board shall calculate the amounts to be appropriated
8 under s. 20.285 (4) (dd) for the next biennium as follows:

9 **SECTION 8.** 36.34 (1) (c) 2. ag. of the statutes is created to read:

10 36.34 **(1)** (c) 2. ag. The board shall determine the amount by which the
11 undergraduate academic fees that will be charged for a student to attend the
12 University of Wisconsin–Madison for the next academic year, as estimated by the
13 board, will increase or decrease from the amount of the undergraduate academic fees
14 charged for a student to attend that institution for the current academic year and
15 multiply the amount of that increase by the number of students who are receiving
16 grants from the appropriation account under s. 20.285 (4) (dd) for the current
17 academic year.

18 **SECTION 9.** 36.34 (1) (c) 2. am. of the statutes is amended to read:

19 36.34 **(1)** (c) 2. am. The board shall determine the percentage by which the
20 undergraduate academic fees that will be charged for the academic year after the
21 next academic year at each institution within the University of Wisconsin System,
22 as estimated by the board, will increase or decrease from the estimated
23 undergraduate academic fees that will be charged for the next academic year.

24 **SECTION 10.** 36.34 (1) (c) 2. ar. of the statutes is created to read:

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1 36.34 (1) (c) 2. ar. The board shall determine the amount by which the
2 undergraduate academic fees that will be charged for a student to attend the
3 University of Wisconsin–Madison for the academic year after the next academic
4 year, as estimated by the board, will increase or decrease from the estimated
5 undergraduate academic fees that will be charged for a student to attend that
6 institution for the next academic year and multiply the amount of that increase by
7 the number of students who will be receiving grants from the appropriation account
8 under s. 20.285 (4) (dd) for the next academic year, as estimated by the board.

9 **SECTION 11.** 36.34 (1) (c) 2. b. of the statutes is amended to read:

10 36.34 (1) (c) 2. b. The appropriation for the first fiscal year of the next biennium
11 shall be the result obtained by increasing, to the nearest \$100, the base amount by
12 the average of the percentage increases determined under subd. 2. a. or the amount
13 determined under subd. 2. ag., whichever is greater, except that, if the
14 undergraduate academic fees for the next academic year are estimated to decrease
15 or not change from the undergraduate academic fees charged for the current
16 academic year at each institution specified in subd. 2. a., the appropriation shall be
17 the base amount.

18 **SECTION 12.** 36.34 (1) (c) 2. bm. of the statutes is amended to read:

19 36.34 (1) (c) 2. bm. The appropriation for the 2nd fiscal year of the next
20 biennium shall be the result obtained by increasing, to the nearest \$100, the base
21 amount by the average of the percentage increases determined under subd. 2. am.
22 or the amount determined under subd. 2. ar., whichever is greater, except that, if the
23 undergraduate academic fees for the academic year after the next academic year are
24 estimated to decrease or not change from the estimated undergraduate academic

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1 fees charged for the next academic year at each institution specified under subd. 2.
2 am., the appropriation shall be the base amount.

3 **SECTION 13.** 39.30 (5) of the statutes is created to read:

4 **39.30 (5) APPROPRIATION CALCULATION.** (a) In this subsection:

5 1. For purposes of calculating the amount to be appropriated under s. 20.235
6 (1) (b) for fiscal year 2009–10, “base amount” means the amount shown in the
7 schedule under s. 20.005 (3) for that appropriation for fiscal year 2008–09.

8 2. For purposes of calculating the amount to be appropriated under s. 20.235
9 (1) (b) for each fiscal year after fiscal year 2009–10, “base amount” means the
10 appropriation amount calculated under par. (b) for the previous fiscal year.

11 (b) By February 1, 2009, and biennially thereafter, the board shall calculate the
12 amount to be appropriated under s. 20.235 (1) (b) for the next biennium as follows:

13 1. The board shall determine the percentage by which the undergraduate
14 academic fees that will be charged for the next academic year at each institution
15 within the University of Wisconsin System, as estimated by the board, will increase
16 or decrease from the undergraduate academic fees charged for the current academic
17 year.

18 2. The board shall determine the amount by which the undergraduate
19 academic fees that will be charged for a student to attend the University of
20 Wisconsin–Madison for the next academic year, as estimated by the board, will
21 increase or increase from the amount of undergraduate academic fees charged for a
22 student to attend that institution for the current academic year and multiply the
23 amount of that increase by the number of students who are receiving grants from the
24 appropriation account under s. 20.235 (1) (b) for the current academic year.

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1 3. The board shall determine the percentage by which the undergraduate
2 academic fees that will be charged for the academic year after the next academic year
3 at each institution within the University of Wisconsin System, as estimated by the
4 board, will increase or decrease from the estimated undergraduate academic fees
5 that will be charged for the next academic year.

6 4. The board shall determine the amount by which the undergraduate
7 academic fees that will be charged for a student to attend the University of
8 Wisconsin–Madison for the academic year after the next academic year, as estimated
9 by the board, will increase or decrease from the estimated undergraduate academic
10 fees that will be charged for a student to attend that institution for the next academic
11 year and multiply the amount of that increase by the number of students who will
12 be receiving grants from the appropriation account under s. 20.235 (1) (b) for the next
13 academic year, as estimated by the board.

14 5. The appropriation for the first fiscal year of the next biennium shall be the
15 result obtained by increasing, to the nearest \$100, the base amount by the average
16 of the percentage increases determined under subd. 1. or the amount determined
17 under subd. 2., whichever is greater, except that, if the undergraduate academic fees
18 for the next academic year are estimated to decrease or not change from the
19 undergraduate academic fees charged for the current academic year at each
20 institution specified in subd. 1., the appropriation shall be the base amount.

21 6. The appropriation for the 2nd fiscal year of the next biennium shall be the
22 result obtained by increasing, to the nearest \$100, the base amount by the average
23 of the percentage increases determined under subd. 3. or the amount determined
24 under subd. 4., whichever is greater, except that, if the undergraduate academic fees
25 for the academic year after the next academic year are estimated to decrease or not

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1 change from the estimated undergraduate academic fees charged for the next
2 academic year at each institution specified under subd. 3., the appropriation shall
3 be the base amount.

4 **SECTION 14.** 39.435 (7) (a) 3. of the statutes is created to read:

5 39.435 (7) (a) 3. For purposes of calculating the amount to be appropriated
6 under s. 20.235 (1) (ff) for fiscal year 2009–10, “base amount” means the amount
7 shown in the schedule under s. 20.005 for that appropriation for fiscal year 2008–09.

8 **SECTION 15.** 39.435 (7) (a) 4. of the statutes is created to read:

9 39.435 (7) (a) 4. For purposes of calculating the amount to be appropriated
10 under s. 20.235 (1) (ff) for each fiscal year after fiscal year 2009–10, “base amount”
11 means the appropriation amount calculated under par. (c) for the previous fiscal
12 year.

13 **SECTION 16.** 39.435 (7) (a) 5. of the statutes is created to read:

14 39.435 (7) (a) 5. For purposes of calculating the amount to be appropriated
15 under s. 20.235 (1) (km) for fiscal year 2009–10, “base amount” means the amount
16 shown in the schedule under s. 20.005 for that appropriation for fiscal year 2008–09.

17 **SECTION 17.** 39.435 (7) (a) 6. of the statutes is created to read:

18 39.435 (7) (a) 6. For purposes of calculating the amount to be appropriated
19 under s. 20.235 (1) (km) for each fiscal year after fiscal year 2009–10, “base amount”
20 means the appropriation amount calculated under par. (d) for the previous fiscal
21 year.

22 **SECTION 18.** 39.435 (7) (b) (intro.) of the statutes, as affected by 2007 Wisconsin
23 Act 20, is amended to read:

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1 39.435 (7) (b) (intro.) ~~Biennially, beginning on~~ By February 1, 2009, and
2 biennially thereafter, the board shall calculate the amounts to be appropriated under
3 s. 20.235 (1) (fe) for the next biennium as follows:

4 **SECTION 19.** 39.435 (7) (b) 1g. of the statutes is created to read:

5 39.435 (7) (b) 1g. The board shall determine the amount by which the
6 undergraduate academic fees that will be charged for a student to attend the
7 University of Wisconsin–Madison for the next academic year, as estimated by the
8 board, will increase or decrease from the amount of the undergraduate academic fees
9 charged for a student to attend that institution for the current academic year and
10 multiply the amount of that increase by the number of students who are receiving
11 grants from the appropriation account under s. 20.235 (1) (fe) for the current
12 academic year.

13 **SECTION 20.** 39.435 (7) (b) 1r. of the statutes is created to read:

14 39.435 (7) (b) 1r. The board shall determine the amount by which the
15 undergraduate academic fees that will be charged for a student to attend the
16 University of Wisconsin–Madison for the academic year after the next academic
17 year, as estimated by the board, will increase or decrease from the estimated
18 undergraduate academic fees that will be charged for a student to attend that
19 institution for the next academic year and multiply the amount of that increase by
20 the number of students who will be receiving grants from the appropriation account
21 under s. 20.235 (1) (fe) for the next academic year, as estimated by the board.

22 **SECTION 21.** 39.435 (7) (b) 2. of the statutes is amended to read:

23 39.435 (7) (b) 2. The appropriation for the first fiscal year of the next biennium
24 shall be the result obtained by increasing, to the nearest \$100, the base amount by
25 the average of the percentage increases determined under subd. 1. or the amount

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1 determined under subd. 1g., whichever is greater, except that, if the undergraduate
2 academic fees for the next academic year are estimated to decrease or not change
3 from the undergraduate academic fees charged for the current academic year at each
4 institution specified in subd. 1., the appropriation shall be the base amount.

5 **SECTION 22.** 39.435 (7) (b) 2m. of the statutes is amended to read:

6 39.435 (7) (b) 2m. The appropriation for the 2nd fiscal year of the next biennium
7 shall be the result obtained by increasing, to the nearest \$100, the base amount by
8 the average of the percentage increases determined under subd. 1m. or the amount
9 determined under subd. 1r., whichever is greater, except that, if the undergraduate
10 academic fees for the academic year after the next academic year are estimated to
11 decrease or not change from the estimated undergraduate academic fees charged for
12 the next academic year at each institution specified in subd. 1m., the appropriation
13 shall be the base amount.

14 **SECTION 23.** 39.435 (7) (c) of the statutes is created to read:

15 39.435 (7) (c) By February 1, 2009, and biennially thereafter, the board shall
16 calculate the amount to be appropriated under s. 20.235 (1) (ff) for the next fiscal year
17 as follows:

18 1. The board shall determine the percentage by which the undergraduate
19 academic fees that will be charged for the next academic year at each institution
20 within the University of Wisconsin System, as estimated by the board, will increase
21 or decrease from the undergraduate academic fees charged for the current academic
22 year.

23 2. The board shall determine the amount by which the undergraduate
24 academic fees that will be charged for a student to attend the University of
25 Wisconsin–Madison for the next academic year, as estimated by the board, will

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1 increase or decrease from the amount of undergraduate academic fees charged for
2 a student to attend that institution for the current academic year and multiply the
3 amount of that increase by the number of students who are receiving grants from the
4 appropriation account under s. 20.235 (1) (ff) for the current academic year.

5 3. The board shall determine the percentage by which the undergraduate
6 academic fees that will be charged for the academic year after the next academic year
7 at each institution within the University of Wisconsin System, as estimated by the
8 board, will increase or decrease from the estimated undergraduate academic fees
9 that will be charged for the next academic year.

10 4. The board shall determine the amount by which the undergraduate
11 academic fees that will be charged for a student to attend the University of
12 Wisconsin–Madison for the academic year after the next academic year, as estimated
13 by the board, will increase or decrease from the estimated undergraduate academic
14 fees that will be charged for a student to attend that institution for the next academic
15 year and multiply the amount of that increase by the number of students who will
16 be receiving grants from the appropriation account under s. 20.235 (1) (ff) for the next
17 academic year, as estimated by the board.

18 5. The appropriation for the next fiscal year shall be the result obtained by
19 increasing, to the nearest \$100, the base amount by the highest percentage increase
20 determined under subd. 1. or the amount determined under subd. 2., whichever is
21 greater, except that, if the undergraduate academic fees for the current academic
22 year decreased or did not change from the undergraduate academic fees charged for
23 the previous academic year at each institution specified under subd. 1., the
24 appropriation shall be the base amount.

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1 6. The appropriation for the 2nd fiscal year of the next biennium shall be the
2 result obtained by increasing, to the nearest \$100, the base amount by the average
3 of the percentage increases determined under subd. 3. or the amount determined
4 under subd. 4., whichever is greater, except that, if the undergraduate academic fees
5 for the academic year after the next academic year are estimated to decrease or not
6 change from the estimated undergraduate academic fees charged for the next
7 academic year at each institution specified under subd. 3., the appropriation shall
8 be the base amount.

9 **SECTION 24.** 39.435 (7) (d) of the statutes is created to read:

10 39.435 (7) (d) By February 1, 2009, and biennially thereafter, the board shall
11 calculate the amount to be appropriated under s. 20.235 (1) (km) for the next
12 biennium as follows:

13 1. The board shall determine the percentage by which the undergraduate
14 academic fees charged for the next academic year at each institution within the
15 University of Wisconsin System, as estimated by the board, will increase or decrease
16 from the undergraduate academic fees charged for the current academic year.

17 2. The board shall determine the amount by which the undergraduate
18 academic fees that will be charged for a student to attend the University of
19 Wisconsin–Madison for the next academic year, as estimated by the board, will
20 increase or decrease from the amount of undergraduate academic fees charged for
21 a student to attend that institution for the current academic year and multiply the
22 amount of that increase by the number of students who are receiving grants from the
23 appropriation account under s. 20.235 (1) (km) for the current academic year.

24 3. The board shall determine the percentage by which the undergraduate
25 academic fees that will be charged for the academic year after the next academic year

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1 at each institution within the University of Wisconsin System, as estimated by the
2 board, will increase or decrease from the estimated undergraduate academic fees
3 that will be charged for the next academic year.

4 4. The board shall determine the amount by which the undergraduate
5 academic fees that will be charged for a student to attend the University of
6 Wisconsin–Madison for the academic year after the next academic year, as estimated
7 by the board, will increase or decrease from the estimated undergraduate academic
8 fees that will be charged for a student to attend that institution for the next academic
9 year and multiply the amount of that increase by the number of students who will
10 be receiving grants from the appropriation account under s. 20.235 (1) (km) for the
11 next academic year, as estimated by the board.

12 5. The appropriation for the next fiscal year shall be the result obtained by
13 increasing, to the nearest \$100, the base amount by the highest percentage increase
14 determined under subd. 1. or the amount determined under subd. 2., whichever is
15 greater, except that, if the amount of the undergraduate academic fees for the current
16 academic year decreased or did not change from the undergraduate academic fees
17 charged for the previous academic year at each institution specified in subd. 1., the
18 appropriation shall be the base amount.

19 6. The appropriation for the 2nd fiscal year of the next biennium shall be the
20 result obtained by increasing, to the nearest \$100, the base amount by the average
21 of the percentage increases determined under subd. 3. or the amount determined
22 under subd. 4., whichever is greater, except that, if the undergraduate academic fees
23 for the academic year after the next academic year are estimated to decrease or not
24 change from the estimated undergraduate academic fees charged for the next

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SECTION 24

1 academic year at each institution specified under subd. 3., the appropriation shall
2 be the base amount.

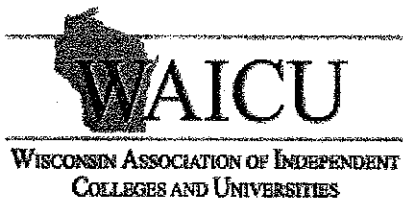
3 **SECTION 25. Effective dates.** This act takes effect on the day after publication,
4 except as follows:

5 (1) TUITION, HIGHER EDUCATION, AND LAWTON GRANTS. The treatment of sections
6 20.235 (1) (b), (ff), and (km), and 20.505 (8) (hm) 10. of the statutes takes effect on
7 July 1, 2009.

8 (END)

APPENDIX 3

February 2009 joint letter to Governor Doyle from the United Council of UW Students, WAICU, and the Wisconsin Technical College District Boards Association.



February 9, 2009

The Honorable James E. Doyle
Governor of Wisconsin
State Capitol, Room 112 East
Madison, WI 53702

-HAND DELIVERED-

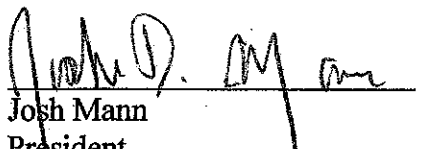
Dear Governor Doyle and Members of the Legislature,


As the time draws near for you to make your decisions on the state biennial budget, we want to speak up together for Wisconsin students attending a University of Wisconsin campus, a campus of the Wisconsin Technical College System, or a Wisconsin nonprofit college or university.


The Governor's budget instructions spoke of "continuing our progress on student aid." The Governor has said that "level funding is the new increase." We understand what he means. At the same time, honesty compels us to relate that as students and their families lose their jobs and sometimes their homes and see the value of their college savings dwindle, level funding is a cut. Susan Marks, CEO of Pinstripe, speaking as president of Competitive Wisconsin, Inc.—an organization of the state's corporate and union leadership—said on February 2 "we need to increase student aid in tough times."

Wisconsin college students cannot wait until good times return. While we appreciate all of the proposals to fund "bricks and mortar," we ask you to remember that without students who have access to them, buildings and programs will help neither our colleges nor our state.

Sincerely,


Josh Mann
President
United Council of UW Students


Rolf Wegenke
President
Wisconsin Association of
Independent Colleges and
Universities


Paul Gabriel
Executive Director
Wisconsin Technical College
District Boards Association