

Online Education Initiative

Exchange Financial Aid Meeting Notes 04/25/16

25 APRIL 2016 /9:00 AM

ATTENDEES

Steve Woodyard, Julie Cathie, Tammera Shinar, Kevin Harral, Becky McCall, Bonnie Peters, Jessica Hurtado, Tim Bonnel, Kira Tippins.

AGENDA

Last Meeting Follow-up

1. Revisited the MOU and Exchange Financial Aid Agreement Drafts.
2. Follow up-development

NOTES

- Bonnie began explained that our meeting would be shorter today because we would just finalize the last items on the agreement. Bonnie mentioned that she reviewed the Agreement and MOU draft and noticed there were some questions and comments. She offered to share it and discuss the questions as a group.
- Bonnie reminded everyone that we did share the draft with the Steering Committee and the OEI Consortium Members. She explained that the Consortium members are responsible for continuing to work on the Exchange Deal, and make decisions collectively in going forward with what happens with the Exchange, so it is very important that they see what the Financial Aid Work group has been working on, and they pretty much give their “blessings” so to speak before moving forward with signatures to finalize the Agreement.
- Bonnie then followed by sharing on her screen The MOU Draft and began addressing the questions listed on the document
 - ***Tammera asked about the student transcripts and why do we need the student to request transcripts, if the purpose is to make it a smooth transition?***
 - Bonnie replied that there are two issues right now: When the information was being gathered, we found out that not all of the colleges have electronic transcripts transfers in their systems right now. As a result the process became more difficult. One of the things the Tech Center is doing is managing the E-transcript information and they are trying to to make it possible that everyone uses e-transcript to be able to make this a smoother process. In this first go

around it is very difficult to have the electronic transcripts but it is one of the GOALS.

- Another issue is the cost, currently the first transcript a student requests is free, but the ones that follow, the student will have to be financially responsible. The part that has not been reconciled is; *what happens under the Exchange if this transcript happens to be the second one for the student? Will there be a funding piece included by the school? Do we waive it? Or what can we do?* Again these two issues have not been reconciled just yet, for now the student will need to request it. Ideally -Now the school could say this student is part of the Exchange and possibly waive it, but again we cannot say it as a blanket statement.
- Tammera added that she feels that it depends on the conversations at each campus. She mentioned that she realized that there is not a lot of conversations regarding the OEI on her campus, and she would like to know if the VP's know that this is the direction that we are going in, or will they assume that this MOU will be all encompassing.
- Bonnie replied that the OEI actually has the same question, ***(How much conversation is happening at the colleges regarding the OEI Exchange?)*** for this reason the Implementation Team Visits will be the starting points of these conversations. Bonnie followed that the OEI definitely understands that the Implementation Visits will need to answer all questions and create a clear breakdown of the OEI Exchange. The goal is that the Implementation Team will hopefully become a new committee on the campus and they will meet every month or so to continue to move forward with the OEI Exchange.
- Bonnie mentioned that we are visiting the campuses in the month of MAY.
 - The next Comment was regarding the ***shared liability when processing R2T4*** (Return to Title IV) When a student drops all of their courses. Because there is no clear direction from the Department of Education yet, regarding some of the concerns, Tammera suggested we should give the Home College the option to deny adding the Host college units if there could be a violation of regulatory requirements. They should be able to have that option just to safeguard their current student population at their Home Institution.
 - Bonnie followed by saying that her only question and concern was that if the option is there and the colleges choose to have that option, then it will throw off the financial aid agreement in a lot of ways. Like one of the messages to students is that they will get combined financial aid units and if that option is there and the college decides to not count the units, then it defeats the purpose.
 - Tammera followed by explaining that she is looking at the situation from her own role as the responsible party of administering the program and following the law, and if she is doing something that she knows is directly in violation of that,

then it is hard for her to do it just because the MOU said we would do it. She explained that she is just not comfortable with it.

- Kira followed that she agrees with Tamera, that it would have to depend heavily on the calendars, there are pretty strict requirements of when a term starts and ends, and what you can include in your payment period. She explained that they do not want this to be the practice but that she understands that if there is a situation that is out of compliance then she would not feel comfortable, because during a federal audit this is not enough to justify.
- Bonnie followed by asking What if we could get very specific as to the situation in which the college would be able to opt out?The question was followed with- the problem with this is that there could be too many situations to list. Tim Bonnel agreed, and made it clear that in some situations there is no way around this, it is not realistic to list all of the possible scenarios.
- Tamera offered to write a paragraph, that will hopefully address their concerns and at the same time present the option in a way that makes it clear that the colleges are not just opting out because they have the option, but rather because it violates some type of regulatory requirement on their part. Bonnie added- that this paragraph can also be offered to the students, and explain the legalities, so they know what to expect if they happen to fall in one of these scenarios.
- Steve asked Tamera about a comment she made stating that they were waiting for a reply from Jeff. Kevin agreed to forward Steve the list of concerns because Steve wants to make sure the concerns are addressed.
- There was a question regarding including in the MOU the details addressing security of information. Steve then followed by reminding us that in our last meeting Bonnie explained that the students participating in the Exchange will be signing blanket release to share information between the colleges. So there should not be an issue as long as the student signs the release.
- Bonnie followed that it is part of the exchange to have the consent signed. Steve suggested adding a blurb about information security, whatever standard you want to set (department of Ed standards, etc.) For educational records, Bonnie explained that she will double check but she is pretty sure information security has been addressed. She agreed to double check the MOU and include that blurb in the Financial Aid Agreement as well.
- Tamera touched on the topic regarding **BOG information (Home College to Teaching College)** being shared between colleges. She explained that Tim, mentioned previously, “that a student could lose their BOG at their Home College, but that they will be eligible for another BOG Waiver as long as it is outside of their district.” Bonnie agreed that the BOG statement should actually be altered in the Master MOU. Tamera agreed to write up a blurb regarding this as well.
- Steve suggested to add the information that was discussed regarding the rules for the exchange students “the student participating in the exchange, needs to be enrolled in at least one class at their home college” This clause will be included in the consortium agreement and the financial aid agreement as well. In the MOU it will be added as an Addendum.

ACTION ITEMS

1. The following clause was added to the MOU as an addendum and it was added in the Financial Aid Agreement as well. “The student participating in the exchange, needs to be enrolled in at least one class at their home college”
2. Everyone agreed to add their website link to the spreadsheet that will list their campus fees.
3. Tammera will forward the information to Bonnie in order to add it to the the agreement.

NEXT WEEK’S AGENDA

1. Please keep in mind that the OEI team will be visiting the Implementation Teams in the next weeks so please look forward to possibly seeing us in person.
2. Bonnie will follow up on development updates and the update of an estimate of how many students will be part of the OEI Exchange.
3. No meeting is scheduled for next week. We will wait to hear back from the Consortium Members and Steering Committee Members. Bonnie and Jessica will send out a meeting request once new information is received.

----WE WILL NOT MEET NEXT MONDAY---