Agenda

• Excelsior Scholarship
  • Overview
  • Impact
  • Landscape
  • Next Steps

• Performance Improvement Fund (PIF)
  • The Large Context
  • Communities of Practice
  • Next Steps
The Excelsior Scholarship Program
Excelsior Scholarship Program Overview

Concept
• Provide the opportunity to attend SUNY or CUNY tuition free as a resident undergraduate student

Enrollment Requirements
• Must have completed 30 credits a year since start of academic career
• Must be in an approved program, leading to an undergraduate degree at SUNY or CUNY
• Must attempt and complete at least 12 credits per term

Income Requirements
• $100,000: 2017/18
• $110,000: 2018/19
• $125,000: 2019/20

Components
• Remaining cost between $5,500* and TAP, SUNY TAP, Pell, and other aid = Excelsior Scholarship
• Cost between SUNY tuition and $5,500 = Excelsior Tuition Credit

After Graduation Requirements
• Must remain in NYS for an equal number of years that scholarship was received post graduation

*Or tuition, whichever is lower
Excelsior Scholarship Program: Theoretical Discussion on Potential Impact of Year One

Of the 605,000 resident undergraduate students at SUNY and CUNY
- 192,000 are part-time and do not qualify

Of the 413,000 remaining:
- 239,000 are Four-Year College Students
- 174,000 are Community College Students

According to HESC Data:
- 55 Percent of Four-Year College Students take 30 Credits a year @ SUNY / 29 Percent @ CUNY
- 30 Percent of Community College Students take 30 Credits a year @ SUNY / 25 Percent @ CUNY

Therefore:
- 107,000 Eligible Four-Year College Students
- 50,000 Eligible Community College Students
- 157,000 Eligible prior to income requirements
Excelsior Scholarship Program:

Theoretical Discussion on Potential Impact of Year One

Of these 157,000 (using SUNY Student Income Range)

- 33,200 of Four-Year College Students do NOT qualify as their income is above $100,000
- 7,500 of Community College Students do NOT qualify as their income is above $100,000
- 40,700 Total

Leaving 116,300 eligible. Of these:

- 52,000 of Four-Year College Students do NOT receive an award as their tuition is fully covered
- 33,000 of Community College Students do NOT receive an award as their tuition is fully covered
- 85,000 Total

Leaving:

- 21,800 Eligible Four-Year College Students
- 9,500 Eligible Community College Students
- 31,300 Total

This represents a theoretical amount of students that will be impacted across both SUNY and CUNY
<table>
<thead>
<tr>
<th>Item</th>
<th>Population</th>
<th>Variable</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost to the State (Year One)</strong></td>
<td>31,300</td>
<td>$5,500 (High)</td>
<td>$172.2M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$2,750 (Medium)</td>
<td>$86.1M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1,833 (Low)</td>
<td>$57.4M</td>
</tr>
<tr>
<td><strong>Cost to SUNY and CUNY (Reimbursed by the State)</strong></td>
<td>21,800</td>
<td>$913 (Average)</td>
<td>$19.9M</td>
</tr>
<tr>
<td><strong>Potential Impact on Revenue</strong></td>
<td>31,300</td>
<td>Potential Tuition Increases</td>
<td>As tuition rates for recipients is held flat at 2016/17 levels, the “effective” return from tuition will be lower than a traditional increase</td>
</tr>
</tbody>
</table>
## Potential Multi-Year Impact of Excelsior Scholarship: Lost Tuition Revenue

The table below shows the estimated revenue loss for various types of campuses over three years and the total revenue loss. The chart visualizes this data with a bar graph.

### Potential Students Impacted

<table>
<thead>
<tr>
<th>Type</th>
<th>Year One</th>
<th>Year Two</th>
<th>Year Three</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>State-operated</td>
<td>15,861</td>
<td>18,856</td>
<td>22,874</td>
<td>57,591</td>
</tr>
<tr>
<td>Statutory</td>
<td>316</td>
<td>378</td>
<td>466</td>
<td>1,160</td>
</tr>
<tr>
<td>Community Colleges</td>
<td>6,827</td>
<td>7,784</td>
<td>8,954</td>
<td>23,565</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>23,004</strong></td>
<td><strong>27,017</strong></td>
<td><strong>32,294</strong></td>
<td><strong>82,315</strong></td>
</tr>
</tbody>
</table>

### Chart Details

- **$3.2M** to **$4.8M** in Year One
- **$3.8M** to **$5.7M** in Year Two
- **$4.6M** to **$6.8M** in Year Three
- **$17.4M** Total Revenue Loss

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**Note:** The data is based on potential multi-year impact on campus revenue due to the Excelsior Scholarship Program.
## Current Understanding of the Excelsior Landscape: Recipients

<table>
<thead>
<tr>
<th>Sector</th>
<th>Number Reporting</th>
<th>Applicable Campuses</th>
<th>Not Reported As of 9/22</th>
<th>% Not Reported as of 9/22</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Centers</td>
<td>2</td>
<td>4</td>
<td>2</td>
<td>50.0%</td>
</tr>
<tr>
<td>Other Doctoral</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>66.7%</td>
</tr>
<tr>
<td>Comprehensive</td>
<td>9</td>
<td>13</td>
<td>4</td>
<td>30.8%</td>
</tr>
<tr>
<td>Technology</td>
<td>4</td>
<td>8</td>
<td>4</td>
<td>50.0%</td>
</tr>
<tr>
<td>Community Colleges</td>
<td>22</td>
<td>30</td>
<td>8</td>
<td>26.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>38</strong></td>
<td><strong>58</strong></td>
<td><strong>20</strong></td>
<td><strong>34.5%</strong></td>
</tr>
</tbody>
</table>

*Information provided is recorded from self-reporting on the SUNY Financial Aid Listserv*
Current Understanding of the Excelsior Landscape: Recipients

Estimates of Excelsior Recipients by Sector and Timeframe

- Comprehensive
  - Reported: 3,824
  - Original Estimate: 5,181
  - Campus Estimate: 5,562

- University Centers
  - Reported: 1,963
  - Original Estimate: 2,144
  - Campus Estimate: 3,489

- Community Colleges
  - Reported: 2,535
  - Original Estimate: 4,161
  - Campus Estimate: 2,717

- Technology
  - Reported: 1,023
  - Original Estimate: 1,581
  - Campus Estimate: 2,544

- Other Doctoral
  - Reported: 77
  - Original Estimate: 166
  - Campus Estimate: 97

- Total
  - Reported: 14,409
  - Original Estimate: 13,243
  - Campus Estimate: 9,422

Legend:
- □ Reported
- □ Original Estimate
- □ Campus Estimate
Current Understanding of the Excelsior Landscape:

Reported Cost to the State - Inclusive of Excelsior Tuition Credit

($M)

Reported numbers shown as indicated by campuses. Estimated based on average award received by student by sector.

Note: Other Doctoral Campus did not report cost.
Current Understanding of the Excelsior Landscape: Opportunity Cost of Excelsior Recipient “Tuition Freeze” Based on Current Cohort ($M)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total: With Tuition Freeze</th>
<th>Total: Without Tuition Freeze</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017/18</td>
<td>$44.6</td>
<td>$45.9</td>
</tr>
<tr>
<td>2018/19</td>
<td>$44.6</td>
<td>$47.3</td>
</tr>
<tr>
<td>2019/20</td>
<td>$44.6</td>
<td>$48.7</td>
</tr>
<tr>
<td>2020/21</td>
<td>$44.6</td>
<td>$50.1</td>
</tr>
</tbody>
</table>

Δ $1.4 Annual
Δ $2.8 Annual
Δ $4.1 Annual
Δ $6.9 Cumulative
Δ $5.5 Annual
Δ $9.6 Cumulative

State-operated campuses only
Next Steps

1. **Ensure that Excelsior Tuition Credit is funded in 2017/18, and funded going forward**
2. **Change “Time Based” Cohort to “Recipient Based”**
3. **Other?**
Performance Improvement Fund (PIF)
The Large Context

How to position SUNY to

- Lead sustainable enrollment growth
- Further education excellence
- Meet critical workforce needs
- Address demographic changes
Themes that Emerged from Campuses during the Performance Improvement Fund Process

Common Challenges

- Need to leverage best practices & work with limited resources
- Desire for “spaces” for collaboration and professional development
- Shared infrastructure to leverage economy of scale
- Need to enhance competitiveness nationally & minimize “unhealthy” SUNY internal competition
Major Topic Areas of Performance Improvement Fund Community of Practices

High Impact Practices for Student Enrollment and Success
- Applied Learning
- Developmental English
- Guided Pathways
- Online Learning

Academic Technologies and Infrastructure
- Customer Relationship Management for Recruitment
- Online Recruitment Solution
- Student Success Center Network
- Enterprise Student Information System

Diversity and Inclusion
- Campus Climate Assessments
- Diversity and Inclusion Training and Education
- Enhancing Representation
- Student Success Best Practices

Critical Workforce Needs
- Clean Energy
- Healthcare
- Advanced Manufacturing
- Information Technology
Expected Outcomes of Performance Improvement Fund

1. Collaborate and leverage to address common challenges
2. Aim for *scalable and system-wide* impact
3. “Move the dial” and deliver *tangible* results
Building Communities of Practice across SUNY
Insights from Investment Fund Processes

- Interaction without engagement
- Collaboration not enabled
- Varied metrics
  - Need to align or map to overall expectations
- Investments in existing or forming communities of practice
  - Stronger and more cohesive results
- Building sustainable, evergreen way to invest
CAMPUS AND SYSTEM STRATEGIC PRIORITIES
EESE Meetings and PIF Proposals

ACTIVITIES

63 Campus Meetings

AND

294 Campus PIF One Page Proposals from 51 campuses

PRIORITIES

New and Innovative Educational Strategies

Stronger Student Recruitment and Success Infrastructures

Extended Commitment to Diversity and Inclusive Excellence
In total **185** proposals were advanced and placed in a larger group

**Shaping Educational Strategy**
- **100** Campus PIF Proposals
- **46** Campuses Invited to Campus Engagement Meetings

**Strengthening Student Recruitment and Success**
- **62** Campus PIF Proposals
- **37** Campuses Invited to Campus Engagement Meetings

**Enhancing our Commitment to Diversity and Inclusion**
- **23** Campus PIF Proposals
- **18** Campuses Invited to Campus Engagement Meetings
# Campus Engagement Meetings (Summer 2017)

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2&lt;sup&gt;nd&lt;/sup&gt; – 3&lt;sup&gt;rd&lt;/sup&gt;</td>
<td>Educational Strategies</td>
</tr>
</tbody>
</table>
| August 2<sup>nd</sup> – 3<sup>rd</sup> | Academic Transformation Proposals  
| August 2<sup>nd</sup> – 3<sup>rd</sup> | Clean Energy Proposals                                   |
| August 3<sup>rd</sup> – 4<sup>th</sup> | Applied Learning                                           |
| August 3<sup>rd</sup> – 4<sup>th</sup> | Applied Learning Proposals                                |
| August 14<sup>th</sup> – 15<sup>th</sup> | Student Recruitment                                       |
| August 14<sup>th</sup> – 15<sup>th</sup> | Customer Relationship Management Recruitment Proposals    |
| August 15<sup>th</sup> – 16<sup>th</sup> | Student Success                                            |
| August 15<sup>th</sup> – 16<sup>th</sup> | Guided Pathways Proposals                                 |
| August 15<sup>th</sup> – 16<sup>th</sup> | Developmental English Proposals                           |
| August 15<sup>th</sup> – 16<sup>th</sup> | Student Success Center Proposals                          |
| August 17<sup>th</sup> – 18<sup>th</sup> | Diversity and Inclusion                                   |
| August 17<sup>th</sup> – 18<sup>th</sup> | Seed Funding of Best Practices                            |
| August 17<sup>th</sup> – 18<sup>th</sup> | STEM Pathways                                             |
| August 17<sup>th</sup> – 18<sup>th</sup> | Statewide Educational Strategy                            |
| September 6<sup>th</sup> – 7<sup>th</sup> | High Needs Proposals                                      |
| September 6<sup>th</sup> – 7<sup>th</sup> | High Needs Proposals                                      |
Performance Improvement Fund Timeline

December – March

Educational Effectiveness and Strategic Enrollment Meetings

April

April 14th Proposal Ideas due

Proposal Ideas were grouped into three main areas

May - July

July 14th Proposal Power point due

August

August – September – Campus Engagement Meetings

September

Communities of Practice / Innovation are formed

October

End of October – Award notifications will be sent out

We are here
Next Steps for the Campuses

Award Notifications will be sent out end of October / early November.

Agreements and requested materials (budgets, etc.) must be returned before funds are distributed.

Campuses will work in their Community of Practice and Innovation toward common goals.
Thank You. Questions?