EOF BASICS 101

Presented by
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New Jersey Educational Opportunity Fund (EOF) Program

- EOF is an annual contractual partnership between the State of New Jersey and participating colleges and universities.

- The Fund is governed by a Board of Directors appointed by the governor.

- The administration of EOF is also subject to administrative codes (regulations & procedures).
Contract Requirements

State of NJ Provides

- Article III Summer Program Funding
- Article III AY Undergraduate Student Grants
- Article III AY Graduate Student Grants
- Article IV Program Support Funds

Institutions Provide

- College access through admission, administration of Art III student grant funds & other financial aid to EOF eligible students
- Pre-freshman summer/initial orientation program
- Comprehensive academic support program
Student Eligibility Requirements

- Resident of NJ for 12 consecutive months
- Demonstrates a background of historical poverty \{N.J.A.C. 9A:11-2.2(b)\}
- Holds a high school diploma or GED
- Meets the institution’s academic criteria for admission to the institution
- Meets the EOF financial criteria \{N.J.A.C. 9A:11-2.3\}
- Intends to matriculate to a degree or certificate course of study
- Exhibits evidence of potential to succeed in college
Students who are residents of New Jersey and dependent upon parents who are undocumented residents must provide additional information to HESAA to establish that they are residents of NJ. Such evidence may include, but is not limited to:

- Proof of graduation from a New Jersey high school;
- Copy of the student’s NJ resident income tax return;
- Copy of NJ driver’s license;
- Evidence of home ownership or a long term lease in NJ; and/or
- Such documentation as may be deemed necessary by HESAA upon specific review of student’s application.
Recruitment & Admission of EOF Students

- Primary responsibility for EOF student recruitment rests with the institution working through its Admissions Office with EOF staff input.
- Institutions are responsible for annually developing & implementing a plan to recruit, identify & select potential EOF students.
- EOF staff assist in identifying, interviewing & selecting prospective students.
- Institutions shall develop a recruitment plan that establishes a priority selection process, including a waiting list & appeal procedures for freshman, transfer and readmit potential EOF applicants.
- Campus EOF directors should have the final determination on awarding Article III grants to EOF students.
- Recruitment plans are subject to audit by the EOF Central Office staff.
Undergraduate Grant Amounts

Based on:

- Full or approved part-time enrollment
- Financial need of student determined by needs analysis
- Type of institution student attends
Priority for Awarding Art. III Student Grants
{N.J.A.C. 9A:11-6.1(h)}

(1) Renewal students who were funded during the previous academic year

(2) First-time, full-time freshmen

(3) EOF transfer students who received an EOF student grant at their previous institution, in the preceding academic year

(4) Renewal students readmitted or returning who did not receive funding the prior academic year

(5) Eligible students who do not fall into any of the 4 categories listed above
## Grant Amounts

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<thead>
<tr>
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<th>Full-time Semester</th>
<th>Part-time Semester</th>
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<tbody>
<tr>
<td></td>
<td>Minimum</td>
<td>Maximum</td>
</tr>
<tr>
<td>Community Colleges</td>
<td>$100</td>
<td>$525</td>
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<td>State/Public Research commuter</td>
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<td>State/Public Research resident</td>
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<td>$700</td>
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<tr>
<td>Independent</td>
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<td>$1,250</td>
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Awarding EOF Article III Student Grant Funds

Institutions have the authority to manage their academic year undergraduate enrollment within the approved Art. III allocation \{N.J.A.C. 9A:11-6.1(e)\}.

- **Caution:** Institutions that decide to award students less than the maximum EOF grant in order to enroll more students should consider the following:

  1. is the practice of reducing student grant awards to increase enrollment sustainable from year to year of attendance?
  2. how does this practice impact the long term loan indebtedness for students who receive reduced awards?
  3. will this practice jeopardize academic progress of the students who received reduced awards?
  4. will the overall retention & graduation rates of students who received reduced awards be monitored?
Select P/T Funding Carefully

EOF Admissions Type Code 6-EOF Part-time Graduating Senior

Student can enroll in a minimum of 3 credits and a maximum of 11 credits

The maximum EOF grant amount in that sector may be requested

Student will not receive TAG

Student must graduate at conclusion of semester/no longer eligible for EOF funding

EOF Admissions Type Code 8 P/T Grant Semesters of Eligibility

- County Colleges – up to 3 semesters
- Senior Institutions- up to 4 semesters

TAG Reject V

county college students who receive p/t TAG for county colleges

- Student is not eligible for EOF p/t grant funding
Full-Time Grant Duration of Eligibility
(N.J.A.C. 9A:11-2.8)

- Art. III student grant funding is cumulative.
- CC students have a maximum of 8 semesters to complete an associate degree.
- Students enrolled at senior institution have a maximum of 12 semesters to complete a baccalaureate degree.
- Initial Art. III grants cannot be given for a student’s last 2 semesters of baccalaureate study.
Class standing and academic progress of all students receiving Art. III student grant funds must be monitored by the institution at least once a year before the next fall semester.

Students must maintain academic progress and class standing to be eligible to continue receiving Article III student grant funds.

EOF students have the first four semesters of EOF Art. III payment to complete all courses the institution designates as remedial/developmental.

Anytime material findings or audit exceptions related to the determination of academic progress are revealed in the course of an audit or program review, the participating institution is obligated to share this information with the EOF Central Office.
Art. III Student Grant Funds Will be Discontinued  
(N.J.A.C. 9A:11-2.14)

- Student fails to meet institution’s class standing and academic progress rules.

- Student is not enrolled.

- Student refuses to abide by regulations established by the institution for participation in the EOF program.

- Student falsifies or gives misleading information upon which program eligibility was based.
Submission of Annual EOF Plan  
(N.J.A.C. 9A:11-4.2)

Contract Attachment D2

Describes how program services are structured to promote student retention and graduation by providing the following information:

- Mission statement of campus based program
- Program goals & objectives
- Assessment method & criteria for success
- Data collection process
- How data analysis will be used to guide future programming direction
Institutional Administration
(N.J.A.C. 9A:11-4.4)

- Participating campus-based EOF programs are required to have a full-time EOF director.
- Requests for waivers of the full-time EOF director requirement must be submitted for consideration.
- Waiver request must explain how the director’s functions will be fulfilled being less than full-time.
- If waiver is approved, it must be resubmitted in the event of a change of personnel or reorganization.
EOF Article IV Program Support Funds

- Art. IV funds are intended to supplement, not supplant, existing services provided by the institution.

- Institutions cannot charge the EOF program directly or through institutional match for services that are not over & above those provided to the general student population.

- Institutions must match EOF Article IV funds dollar for dollar.
Restrictions on Use of Art. IV Funds
(N.J.A.C. 9A:11-6.10)

Article IV program support funds cannot be used for:

- Salary & fringe benefits of EOF directors
- Employee benefits for AY student assistants and p/t personnel
- Purchase of equipment/hardware
- Indirect expenses that exceed 10% of total Art. IV allocation
- Transportation of students for normal commuting costs
- Fringe benefits for 12-month staff at senior public institutions
- Fringe benefits in excess of 21% of salaries & wages paid for by EOF funds for 12-month staff at community colleges & independent institutions
- Cost of instruction for which students are charged tuition
- Other student costs for which students are normally charged tuition?
- Lobbying, partisan political contributions and/or fund-raising activities
- Purchase of alcoholic beverages
Transfer of Article IV Funds  
(N.J.A.C. 9A:11-6.11)

Requests to transfer Art. IV funds must be made in writing to your EOF program liaison before April 15th.

Transfers should be submitted for the following reasons:

(1) to add new personnel & other than personnel items that are not part of the current FY contract budget attachment B2- you must have EOF Central office approval

(2) to move funds between existing personnel lines- you simply need to inform the EOF Central Office that you made the transfer
Recordkeeping & Data Collection
(N.J.A.C. 9A:11-6.14)

Each campus EOF program should have access to state of the art hardware/software capabilities, as well as management information systems and institutional research staff services. Institutions must keep student records on all aspects of EOF program support services, offered during every fiscal year, including:

- Admission & financial eligibility decisions
- Student’s performance in areas of basic skills
- Counseling contacts
- Tutoring & supplemental instruction contacts
- Current registration and academic transcripts
- Student retention and graduation rates
- Financial documentation for all program budgets & expenditures
Destruction of EOF Program Records

The State of New Jersey Department of Treasury is responsible for Records Retention and Disposition. The Bureau of Records maintains retention schedules that list the minimum legal and fiscal time periods student records must be retained by state, local governmental and educational agencies.

All programs are strongly advised to adhere to the Dept. of Treasury’s record retention schedule which can be found at;

http://www.state.nj.us/treasury/revenue/rms/retention.shtml
Fiscal Audit Requirements
(N.J.A.C. 9A:6.17)

- Institutions shall have separate accounts for each EOF allocation received or,
- Deposit state funds in a general account as long as funds are identified by their separate EOF categories.
- Clear audit trails must be maintained.
- The EOF Program shall be included as part of the institution’s periodic audit by an independent accounting firm. Institutions are required to provide a copy of the audit to the OSHE.
- The EOF Board reserves the right to conduct its own institutional audit.

Institutions with unsatisfactory program evaluations, fiscal audits or failure to achieve the program outcomes contractually agreed to in contract attachment D2, run the risk of being placed on probationary status.

The EOF Board can place a program on probation for failure to correct program deficiencies within a specific time frame and impose restrictions that may include, but are not limited to:

- Restricted recruitment of new program students;
- Withholding of funds for the program pursuant to provisions of the contract; and
- Termination of the institutional program pursuant to contract provisions.
Program Advisory Board (PAB)
(N.J.A.C. 9A:11-6.20)

- Programs are strongly encouraged, but not required to have program advisory boards.
- Size & method of selection of the PAB is at the institution’s discretion
- Membership may include students, faculty, administration, as well as local citizens who reflect the student population being served by the campus program.
- PAB shall establish a meeting schedule for the academic year & keep minutes of the meetings to demonstrate, at a minimum, involvement in the following activities:
  - advising on search & selection of campus administrator/director
  - acquainting local & campus communities w/t goals & objectives of the program
  - reviewing admissions criteria & procedures used in recruiting EOF students
  - serving as a resource for student mentoring, internships & employment opportunities
  - reviewing & commenting on the institution’s program goals & objectives
How to Reach Us

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