

11/16/97  
Tommy G. Thompson  
Governor

Valorie T. Olson  
Executive Secretary



HEAB Mailing Address:  
Post Office Box 7885  
Madison, WI 53707-7885

FAX No. 267-2808

## State of Wisconsin Higher Educational Aids Board

131 West Wilson Street, Madison, Wisconsin

August 1, 1997

The Honorable Brian Burke, Co-Chair  
Joint Committee on Finance  
State Capitol, LL1 M  
Madison, WI 53701

The Honorable Scott Jensen, Co-Chair  
Joint Committee on Finance  
State Capitol, 315 N  
Madison, WI 53701

Dear Senator Burke and Representative Jensen:

Enclosed is the 1996-97 Annual Status Report for the Academic Excellence Scholarship (AES) Program. This report is in compliance with Section 39.41(7) of the Wisconsin Statutes which requires a yearly report regarding the AES Program. In addition to presenting final 1996-97 data, preliminary data is included for the freshmen who will enroll during the academic year 1997-98 as the eighth class of scholars since the inception of the program.

Additional rules addressing qualifications of students who receive the AES and the responsibilities of high schools in naming the recipients have been drafted. A rulemaking order has been prepared. It is expected that this order will be transmitted to the Legislative Council Rules Clearinghouse by August 15, 1997.

If you have any questions about this report or about the AES Program, please feel free to contact me at 267.2208.

Sincerely,

Valorie T. Olson  
Executive Secretary

CC: Members of the Joint Committee on Finance  
Legislative Fiscal Bureau  
Department of Administration

Tommy G. Thompson  
Governor

Valorie T. Olson  
Executive Secretary



HEAB Mailing Address:  
Post Office Box 7885  
Madison, WI 53707-7885

FAX No. 267-2808

## State of Wisconsin Higher Educational Aids Board

131 West Wilson Street, Madison, Wisconsin

1996-97

### ACADEMIC EXCELLENCE SCHOLARSHIP PROGRAM Annual Status Report

1996-97 was the first year that the \$2,250 cap was placed on the Academic Excellence Scholarship (AES) freshmen recipients. There were 694 freshmen scholars under this cap requirement utilizing \$757,317 of the program's funds. In 1995-96, 677 freshmen scholars required \$899,729 to fund their scholarships. The cap was initiated to control spending. Once all four classes, freshmen through seniors, have a tuition cap tied to their scholarship; spending in this program will be more predictable and therefore more manageable. However, the approach that has been implemented will not accomplish any kind of spending control in the next two years if U. W. Madison tuition continues to increase for the sophomores and juniors of 1996-97.

Due to the increase in U. W. Madison tuition costs, there was a \$162,000 shortfall in 1996-97. To cover this shortfall, the Higher Educational Aids Board (HEAB) requested the transfer of \$80,000 GPR from the Nursing Student Loan Program, the transfer of \$15,000 GPR from the Independent Student Grant Program, and a supplement of \$67,000 GPR from the appropriation from the Joint Committee on Finance. HEAB was granted this request with the exception of the \$15,000 from the Independent Student Grant. Consequently, HEAB reduced all second semester scholarships by \$3 to \$6.

Seven tables are attached showing final figures for 1996-97 along with preliminary data for 1997-98.

- Tables I, II, III present enrollment information by sector (University of Wisconsin, Wisconsin Technical College, and Wisconsin Independent Colleges and Universities.) These figures represent the students who received AES Program funds.
- Tables IV and V present financial need related information by sector. The average contribution and adjusted gross income (AGI) figures are for AES Program recipients who also received other State of Wisconsin funded financial assistance (Wisconsin Higher Education Grant, Wisconsin Tuition Grant, Talent Incentive Program Grant, and Wisconsin Indian Grant.) The figures in the HEAB AES Amount column are the scholarship funds administered by HEAB. This amount is matched by the school that the student attends in order to fully fund the scholarship award.
- Table VI presents general information such as the number of scholars using their award to attend a Wisconsin college or university. This table also reflects the number of students who have lost their eligibility for the scholarship. Please keep in mind that the students who have lost their scholarship may regain their eligibility in 1997-98.
- Table VII gives preliminary information for 1997-98 freshmen.

TABEL III						
ACADEMIC EXCELLENCE SCHOLARS			INDEPENDENT COLLEGES AND UNIVERSITIES			
1996-97 ACADEMIC YEAR						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Alverno	0	2	1	2	5	7,544
Beloit	3	4	2	2	11	15,432
Cardinal Stritch	1	2	4	2	9	13,191
Carroll	11	8	8	4	31	41,942
Carthage	5	1	5	1	12	14,098
Edgewood	0	2	4	3	9	13,579
Lakeland	1	1	1	3	6	7,914
Lawrence	25	8	10	19	62	81,714
Marian	1	1	2	1	5	7,155
Marquette	34	33	34	33	134	178,273
MSOE	10	8	10	9	37	49,576
Mount Mary	1	0	0	0	1	563
Northland	0	2	0	2	4	6,035
Ripon	6	4	2	6	18	24,828
St. Norbert	18	13	15	14	60	83,532
Viterbo	6	4	3	0	13	16,722
Concordia	2	2	1	2	7	9,786
MIAD	1	0	1	0	2	2,629
WI Lutheran	5	2	2	1	10	13,146
Maranatha	2	1	2	2	7	9,034
Bellin	0	1	0	0	1	751
<b>Indep. Coll. Total</b>	<b>132</b>	<b>99</b>	<b>107</b>	<b>106</b>	<b>444</b>	<b>597,444</b>
<b>Grand Total UW-WTCS-Indep.</b>	<b>694</b>	<b>629</b>	<b>575</b>	<b>557</b>	<b>2455</b>	<b>3,159,629</b>

NOTE: TABLES III SHOWS ACTUAL NET SPENT AMOUNTS AND THE SCHOLARS WITH THOSE NET SPENT AMOUNTS.

TABLE I						
ACADEMIC EXCELLENCE SCHOLARS			UNIVERSITY OF WISCONSIN INSTITUTIONS			
1996-97 ACADEMIC YEAR						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Madison	320	325	257	248	1150	1,564,883
Milwaukee	24	17	17	17	75	94,533
Green Bay	19	16	10	10	55	64,742
Parkside	5	3	2	4	14	16,900
Centers	4	10	4	0	18	14,048
Eau Claire	38	31	51	29	149	175,868
la Crosse	34	32	27	28	121	145,451
Oshkosh	11	19	17	17	64	71,270
Platteville	24	14	18	22	78	87,946
River Falls	24	15	20	16	75	86,921
Stevens Point	23	19	18	29	89	106,639
Stout	6	8	8	6	28	30,743
Superior	2	6	2	3	13	15,111
Whitewater	23	11	14	22	70	79,408
<b>UW Total</b>	<b>557</b>	<b>526</b>	<b>465</b>	<b>451</b>	<b>1999</b>	<b>2,554,463</b>

TABLE II						
ACADEMIC EXCELLENCE SCHOLARS			WISCONSIN TECHNICAL COLLEGES			
1996-97 ACADEMIC YEAR						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Chippewa Valley	0	0	2	0	2	1,138
Northeast WI	0	1	0	0	1	358
Gateway	0	1	0	0	1	782
Milwaukee Area	3	2	0	0	5	3,573
Northcentral WI	2	0	0	0	2	1,100
Indianhead	0	0	1	0	1	771
<b>WTCS Total</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>0</b>	<b>12</b>	<b>7,722</b>

<b>UW &amp; WTCS Total</b>	<b>562</b>	<b>530</b>	<b>468</b>	<b>451</b>	<b>2011</b>	<b>2,562,185</b>
----------------------------	------------	------------	------------	------------	-------------	------------------

NOTE: TABLES I AND II SHOW ACTUAL NET SPENT AMOUNTS AND THE SCHOLARS WITH THOSE NET SPENT AMOUNTS.

TABLE IV							
ACADEMIC EXCELLENCE SCHOLARS (ALSO RECEIVING STATE GRANTS)				UNIVERSITY OF WISCONSIN AND WTCS INSTITUTIONS 1996-97			
ACADEMIC YEAR							
	Total Scholars	Applied for Aid	State Aid Eligible	Average Contribution	Average AGI	State Aid Amount	HEAB AES Amount
Madison	1155	478	66	527	17,611	71,886	1,591,317
Milwaukee	75	38	10	286	9,342	14,003	96,704
Green Bay	55	26	3	365	14,594	2,983	64,983
Parkside	14	7	3	443	12,033	2,676	16,970
Centers	20	0	0	N\A	N\A	0	16,523
Eau Claire	150	73	20	795	20,387	19,522	179,556
La Crosse	124	54	11	645	16,201	10,076	151,370
Oshkosh	67	25	8	396	14,721	9,397	76,053
Platteville	78	44	10	777	13,697	8,964	91,530
River Falls	75	50	17	1,405	18,557	15,595	89,075
Stevens Point	91	44	13	399	18,716	16,726	110,362
Stout	29	17	5	1,209	11,276	3,385	33,281
Superior	13	11	3	336	14,901	4,193	15,170
Whitewater	70	31	10	623	16,229	9,802	82,302
<b>UW Total</b>	<b>2016</b>	<b>898</b>	<b>179</b>	<b>650</b>	<b>16,751</b>	<b>189,208</b>	<b>2,615,196</b>
<b>WTCS Total</b>	<b>15</b>	<b>9</b>	<b>6</b>	<b>0</b>	<b>5,545</b>	<b>8,473</b>	<b>8,091</b>
<b>Total UW &amp; WTCS</b>	<b>2031</b>	<b>907</b>	<b>185</b>	<b>650</b>	<b>16,387</b>	<b>197,681</b>	<b>2,623,287</b>

NOTES: TABLE IV SHOWS SCHOLARS AND AMOUNTS AWARDED.

THE FINAL COLUMN IS THE AMOUNT OF AES THAT HEAB PROVIDES. THE INSTITUTIONS MATCH THIS AMOUNT TO FULLY FUND THE SCHOLARS.

TABLE V							
ACADEMIC EXCELLENCE SCHOLARS (ALSO RECEIVING STATE GRANTS) YEAR	INDEPENDENT COLLEGES AND UNIVERSITIES 1996-97 ACADEMIC						
	Total Scholars	Applied For Aid	State Aid Eligible	Average Contribution	Average AGI	State Aid Amount	HEAB AES Amount
Alverno	6	3	3	596	13,099	6,356	9,090
Beloit	12	11	7	2,832	45,721	15,204	16,620
Cardinal Stritch	9	7	4	1,902	20,086	7,308	13,253
Carroll	31	24	17	2,847	34,425	39,742	42,132
Carthage	14	12	5	2,344	39,232	10,860	18,316
Edgewood	9	2	2	1,950	38,989	4,344	13,635
Lakeland	6	5	2	2,523	31,468	3,136	7,947
Lawrence	62	47	34	2,797	36,940	71,698	82,692
Marian	5	5	2	2,372	20,682	4,344	7,189
Marquette	138	95	46	2,695	36,199	95,191	189,442
MSOE	39	29	23	2,593	33,737	52,348	54,071
Mt. Mary	1	1	1	0	0	2,472	563
Northland	4	3	2	1,833	22,924	4,344	6,060
Ripon	18	16	12	2,379	34,160	26,064	24,942
St. Norbert	61	29	29	2,786	31,376	62,059	85,046
Viterbo	13	10	7	1,741	31,655	16,210	16,800
Concordia	8	4	4	2,458	41,401	8,484	11,346
MIAD	2	2	1	0	24,716	3,672	2,640
WI Lutheran	10	8	3	3,074	37,865	6,505	13,205
Maranatha Baptist	7	5	5	1,686	31,001	6,197	9,072
Bellin	1	1	0	N\A	N\A	0	758
<b>Total</b>	<b>456</b>	<b>319</b>	<b>209</b>	<b>2,557</b>	<b>34,194</b>	<b>446,538</b>	<b>624,819</b>
<b>Grand Total UW-WTCS-Indep.</b>	<b>2,487</b>	<b>1,226</b>	<b>394</b>	<b>1,652</b>	<b>25,833</b>	<b>644,219</b>	<b>3,248,106</b>

NOTES: TABLE IV SHOWS SCHOLARS AND AMOUNTS AWARDED.

THE FINAL COLUMN IS THE AMOUNT OF AES THAT HEAB PROVIDES. THE INSTITUTIONS MATCH THIS AMOUNT TO FULLY FUND THE SCHOLARS.

TABLE VI			
GENERAL SCHOLAR DATA			
	1994-95	1995-96	1996-97
Total Scholarships Available	3107	3151	3197
Total Scholars Enrolled In-State	2238	2363	2484
Scholars Enrolled as Freshmen	644	682	698
Alternate Scholarship Recipients		40	55
% of Eligible Freshmen Enrolled In-State	81%	84%	86%
Lost Eligibility-Did Not Maintain a 3.000 GPA <sup>1</sup>	87	81	95
Lost Eligibility-Insufficient Credit Load <sup>2</sup>	4	13	43

<sup>1</sup> Of the 95 students with a GPA under 3.000, some may regain a 3.000 GPA after taking summer courses.

<sup>2</sup> Of the 43 students who were not enrolled full-time each term, or have insufficient credits, some may regain eligibility after contacting HEAB and obtaining deferments.

TABLE VII	
PRELIMINARY DATA - 1997-98 FRESHMAN SCHOLARS AS OF JULY 15, 1997	
TOTAL SCHOLARSHIPS AVAILABLE	827
TOTAL SCHOLARS ENROLLED IN WISCONSIN INSTITUTIONS	589
PERCENTAGE OF SCHOLARS ENROLLED IN WISCONSIN INSTITUTIONS	71%
Scholars Enrolled in UW System Institutions	499
Scholars Enrolled in Independent Colleges	83
Scholars Enrolled in WTCS Institutions	7
Scholars Enrolled in Non-Wisconsin Institutions	105
Scholars Who Have Not Yet Responded	170