

# Multiple Agency Fiscal Note Summary

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access
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## Estimated Cash Receipts

NONE

## Estimated Operating Expenditures

Agency Name	2019-21			2021-23			2023-25		
	FTEs	GF-State	Total	FTEs	GF-State	Total	FTEs	GF-State	Total
Student Achievement Council	.1	161,000	161,000	.0	0	0	.0	0	0
Superintendent of Public Instruction	.0	5,000	5,000	.0	0	0	.0	0	0
University of Washington	.1	34,874	34,874	.0	0	0	.0	0	0
Washington State University	.0	0	0	.0	0	0	.0	0	0
Eastern Washington University	.0	2,695	2,695	.0	4,600	4,600	.0	4,600	4,600
Central Washington University	.0	7,838	7,838	.0	0	0	.0	0	0
The Evergreen State College	.0	2,442	2,442	.0	0	0	.0	0	0
Western Washington University	.1	9,252	9,252	.0	8,758	8,758	.0	8,758	8,758
Community and Technical College System	.0	30,000	30,000	.0	0	0	.0	0	0
<b>Total \$</b>	<b>0.3</b>	<b>253,101</b>	<b>253,101</b>	<b>0.0</b>	<b>13,358</b>	<b>13,358</b>	<b>0.0</b>	<b>13,358</b>	<b>13,358</b>

## Estimated Capital Budget Expenditures

Agency Name	2019-21			2021-23			2023-25		
	FTEs	Bonds	Total	FTEs	Bonds	Total	FTEs	Bonds	Total
Student Achievement Council	.0	0	0	.0	0	0	.0	0	0
Superintendent of Public Instruction	.0	0	0	.0	0	0	.0	0	0
University of Washington	.0	0	0	.0	0	0	.0	0	0
Washington State University	.0	0	0	.0	0	0	.0	0	0
Eastern Washington University	.0	0	0	.0	0	0	.0	0	0
Central Washington University	.0	0	0	.0	0	0	.0	0	0
The Evergreen State College	.0	0	0	.0	0	0	.0	0	0
Western Washington University	.0	0	0	.0	0	0	.0	0	0
Community and Technical College System	.0	0	0	.0	0	0	.0	0	0
<b>Total \$</b>	<b>0.0</b>	<b>0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0</b>

## Estimated Capital Budget Breakout

<b>Prepared by:</b> Breann Boggs, OFM	<b>Phone:</b> (360) 902-0659	<b>Date Published:</b> Final 3/ 1/2020
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# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 340-Student Achievement Council
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years	0.0	0.2	0.1	0.0	0.0
<b>Account</b>					
General Fund-State 001-1	0	161,000	161,000	0	0
<b>Total \$</b>	0	161,000	161,000	0	0

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☒ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☐ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Becky Thompson	Phone: 360-753-7840	Date: 02/23/2020
Agency Approval: Don Bennett	Phone: 360-753-7810	Date: 02/23/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

This fiscal note assumes adoption of the Senate floor amendment (6141-S AMS RAND S6764.1) to Substitute Senate Bill 6141, which provides financial aid tools and information to prospective postsecondary students.

With respect to Washington Student Achievement Council (WSAC) responsibilities, the adopted amendment has WSAC collaborating with financial aid experts from public two- and four-year colleges and independent colleges, instead of the Council of Presidents. This revision does not change the fiscal impact of the legislation.

WSAC responsibilities include:

- Create and provide a centralized online financial aid calculator that estimates Federal Pell Grant and Washington College Grant award amounts. (Section 2)
- In collaboration with financial aid experts from public two and four-year colleges and independent colleges, develop consistent definitions for financial aid award letters. (Section 3)
- WSAC to assist the Washington State School Directors' Association with the development of a model policy for a financial aid advising day. (Section 4(3))
- Coordinate with the Office of the Superintendent of Public Instruction and school districts on financial aid advising day and Free Application for Federal Student Aid (FAFSA)/Washington Application for State Financial Aid (WASFA) seminars. (Section 5(2))
- Provide districts with information on the Washington College Grant. (Sections 4(1)(b)(i), 5(1)(b)(iii), 6(1)(c)(v) (E)(V))

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

### II. C - Expenditures

*Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.*

#### Section 2 - Centralized online financial aid calculator

WSAC would have administrative expenses in year one (assumed to be FY21) to build this calculator. Design and development of the online calculator will require .1 FTE Program Associate and .1 FTE Software Developer. Promotion of the tool would be done through established communication methods and would not require additional expenses.

#### Section 3 – Consistent financial aid award letter definitions

WSAC would convene a group of stakeholders in collaboration with financial aid experts from public two and four-year colleges and independent colleges. WSAC assumes one in-person meeting in the Seattle area and up to three other webinars for collaboration with the four-year public institutions of higher education as outlined in Section 3. Expenses would include meeting space and travel costs.

Sections 4, 5 and 6 – Coordination and support of financial aid application outreach by district and promotion of the Washington College Grant.

WSAC would capitalize on existing College Bound Scholarship and “12th Year Campaign” resources,

infrastructure with districts and current training offerings. Currently, 174 school sites in 113 school districts participate in WSAC's 12th year campaign to provide FAFSA/WASFA training, resources, and promotional materials. To serve approximately another 130 districts, WSAC would have publication costs of \$130,000. If published materials require changes or updates in the out years, indeterminate additional expenditures may be necessary.

This fiscal note assumes all costs would occur in FY21. Staff time estimates are rounded to the nearest .1 FTE and employee-related and goods and services costs are rounded to the nearest \$1000.

## Part III: Expenditure Detail

### III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	161,000	161,000	0	0
<b>Total \$</b>			0	161,000	161,000	0	0

### III. B - Expenditures by Object Or Purpose

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years		0.2	0.1		
A-Salaries and Wages		17,000	17,000		
B-Employee Benefits		4,000	4,000		
C-Professional Service Contracts					
E-Goods and Other Services		137,000	137,000		
G-Travel		3,000	3,000		
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
<b>Total \$</b>	0	161,000	161,000	0	0

### III. C - Operating FTE Detail: *List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA*

Job Classification	Salary	FY 2020	FY 2021	2019-21	2021-23	2023-25
Program Associate	69,000		0.1	0.1		
Software Developer	101,000		0.1	0.1		
<b>Total FTEs</b>			0.2	0.1		0.0

### III. D - Expenditures By Program (optional)

Program	FY 2020	FY 2021	2019-21	2021-23	2023-25
Financial Aid & Grant Programs (030)		161,000	161,000		
<b>Total \$</b>		161,000	161,000		

## Part IV: Capital Budget Impact

### IV. A - Capital Budget Expenditures

NONE

### IV. B - Expenditures by Object Or Purpose

NONE

**IV. C - Capital Budget Breakout**

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

**Part V: New Rule Making Required**

# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 350-Superintendent of Public Instruction
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
<b>Account</b>					
General Fund-State 001-1	0	5,000	5,000	0	0
<b>Total \$</b>	0	5,000	5,000	0	0

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Mike Woods	Phone: 360 725-6283	Date: 02/18/2020
Agency Approval: Mike Woods	Phone: 360 725-6283	Date: 02/18/2020
OFM Review: Cynthia Hollimon	Phone: (360) 902-0562	Date: 02/20/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

Changes in SSB 6141 AMS RAND compared to the previous version (SSB 6141):

This version makes changes in Section 3 by adding to the list of stakeholders who must be consulted on the financial aid award letter. These changes do not affect OSPI's estimated fiscal impacts.

Summary of SSB 6141 AMS RAND:

Section 4 requires school districts, beginning in the 2020-21 school year to provide financial aid advising days, as defined in Section 5. WSSDA, with assistance from OSPI, it to develop a model financial advising day policy.

Section 5 requires the Office of the Superintendent of Public Instruction (OSPI), within existing resources, to coordinate a financial aid advising day with all school districts with a high school.

A "financial aid advising day" is a day or series of days between September 1 and December 1 of each year that includes, but is not limited to, dedicated time during regular school hours for staff to:

- Provide information to twelfth grade students on the Free Application for Federal Student Aid (FAFSA) and the Washington Application For State Financial Aid (WASFA);
- Assist twelfth graders in completing the FAFSA and WASFA; and
- In conjunction with the Washington Student Achievement Council (WSAC), distribute information on the Washington college grants and demonstrate the use of the financial aid calculator created in Section 2 of this act.

OSPI shall coordinate with WSAC whenever possible to assist districts in facilitating opportunities outside regular school hours for parents to take part in seminars on the FAFSA and WASFA.

Students under eighteen years of age may choose to opt out of scheduled financial aid day activities with written consent from a parent or guardian. Student eighteen years of age or older may choose to opt out by signing a waiver.

In the administration of the financial aid advising day, personally identifiable student or family information must be protected in accordance with state and federal privacy laws.

Section 6 adds the requirement that HSBPs must include a four-year plan for course taking that includes information about the Washington College Grant and other scholarship opportunities.

Section 7 adds the requirement that electronic platforms for HSBPs must include a sample financial aid letter and a link to the financial aid calculator created in Section 2 of this bill.

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

### II. C - Expenditures



Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.

Section 4 requires WSSDA to develop a model policy. OSPI assumes it would enter into an interagency agreement to provide WSSDA \$5,000 to complete the model policies.

Section 5 requires the Washington Student Achievement Council (WSAC) and OSPI to coordinate financial aid advising days with all school districts with high schools. OSPI already does this type of work within existing resources. Therefor this requirement has no additional fiscal impacts.

Sections 6 and 7 makes changes to the HSBPs. Any additional costs to meet the new requirements would be incurred by the vendors who build the HSBP platforms. No impact to OSPI.

Part III: Expenditure Detail

III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	5,000	5,000	0	0
Total \$			0	5,000	5,000	0	0

III. B - Expenditures by Object Or Purpose

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years					
A-Salaries and Wages					
B-Employee Benefits					
C-Professional Service Contracts					
E-Goods and Other Services		5,000	5,000		
G-Travel					
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
Total \$	0	5,000	5,000	0	0

III. C - Operating FTE Detail: List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA  
NONE

III. D - Expenditures By Program (optional)

NONE

Part IV: Capital Budget Impact

IV. A - Capital Budget Expenditures

NONE

IV. B - Expenditures by Object Or Purpose

NONE

**IV. C - Capital Budget Breakout**

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

**Part V: New Rule Making Required**

# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 360-University of Washington
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years	0.0	0.2	0.1	0.0	0.0
<b>Account</b>					
General Fund-State 001-1	0	34,874	34,874	0	0
<b>Total \$</b>	0	34,874	34,874	0	0

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Jessie Friedmann	Phone: 206-685-8868	Date: 02/20/2020
Agency Approval: Kelsey Rote	Phone: 2065437466	Date: 02/20/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

6141 S SB AMS RAND S6764.11 seeks to undertake several actions to improve financial aid awareness and increase coordination among institutions of higher education and other stakeholders.

This amendment makes the following changes, as compared to the substitute:

- Adds the independent colleges and public two-year colleges and universities to the stakeholders who must be consulted on the financial aid award letter standardization.
- Clarifies that WSAC and stakeholders will develop consistent definitions to be used in financial aid award letters.

These changes do not substantively affect fiscal impacts associated with this bill on the UW.

Similar to our previous assessment, we estimate that Section 3 would require, by July 1, 2021, all public four-year and two-year institutions of higher education, as well as all independent colleges in Washington state, to adopt uniform technology and a standardized template for financial aid award packages so that students may easily compare them.

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

### II. C - Expenditures

*Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.*

We estimate that the bill would have the following fiscal impacts. Please note that these estimates would vary greatly based on the materials that are ultimately created and need to be implemented. Per OFM guidance, this fiscal note is based on the least expensive means of completing the actions required in the bill.

Our estimate for Section 3 is based on the minimum number of updates needed in order to adopt the materials created in this section. Please note that we estimate that updates to these systems could take up to 400 hours, depending on the updates ultimately required.

-- At a minimum, Section 3 would require 40 hours of time (0.02 FTE) from a programmer for UW-IT (salary: \$120,000; benefits: 32.1%) to implement the award template, test the template within existing communications, and replace all old terminology with the new uniform terminology on all websites and communications sent to students.

-- We also anticipate that this would require .18 FTE coordination from an Assistant Director in the UW Office of Student Financial Aid (salary: \$120,000; benefits rate: 32.1%).

Per lead agency assumptions, we assume that an Assistant Director in the UW Financial Aid office (salary: \$120,000; benefits rate: 32.1%) would participate in work group meetings based in Seattle throughout FY21, totaling .02 FTE in order to help develop these standards.

## Part III: Expenditure Detail

### III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	34,874	34,874	0	0
Total \$			0	34,874	34,874	0	0

### III. B - Expenditures by Object Or Purpose

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years		0.2	0.1		
A-Salaries and Wages		26,400	26,400		
B-Employee Benefits		8,474	8,474		
C-Professional Service Contracts					
E-Goods and Other Services					
G-Travel					
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
Total \$	0	34,874	34,874	0	0

### III. C - Operating FTE Detail: *List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA*

Job Classification	Salary	FY 2020	FY 2021	2019-21	2021-23	2023-25
Assistant Director, UW Financial Aid	120,000		0.2	0.1		
Programmer, UW-IT	120,000		0.0	0.0		
Total FTEs			0.2	0.1		0.0

### III. D - Expenditures By Program (optional)

NONE

## Part IV: Capital Budget Impact

### IV. A - Capital Budget Expenditures

NONE

### IV. B - Expenditures by Object Or Purpose

NONE

### IV. C - Capital Budget Breakout

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

## Part V: New Rule Making Required

# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 365-Washington State University
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

NONE

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Maggie McFadden	Phone: 509-335-1614	Date: 02/21/2020
Agency Approval: Chris Jones	Phone: 509-335-9682	Date: 02/21/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

6141 SSB AMS RAND amendment does not change the fiscal impact for WSU.

Section 2 Based on the assumption that section 2 (1) places the onus of adopting a centralized statewide calculator tool on the Student Achievement Council, WSU estimates we can fulfill this requirement by posting a link to the web site managed by the council.

Section 3 (1) For purposes of this fiscal note, WSU assumes the same lead agency assumptions apply. WSAC assumes one in-person meeting in the Seattle area and up to three webinars for the collaboration with two and four-year public colleges as outlined in Section 3. WSU estimates minimal costs related to the one in-person meeting (less than \$1,000). Webinars would be absorbed within existing resources.

Section 3 (2) WSU assumes a new template would require changes incorporating uniform terminology that could be accomplished within existing resources. If a new standardized template requires wholesale change incorporating new features not yet designed, costs could be higher.

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

### II. C - Expenditures

*Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.*

## Part III: Expenditure Detail

### III. A - Operating Budget Expenditures

NONE

### III. B - Expenditures by Object Or Purpose

NONE

**III. C - Operating FTE Detail:** *List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA*

NONE

### III. D - Expenditures By Program (optional)

NONE

## Part IV: Capital Budget Impact

### IV. A - Capital Budget Expenditures

NONE

**IV. B - Expenditures by Object Or Purpose**

NONE

**IV. C - Capital Budget Breakout**

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

**Part V: New Rule Making Required**



# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 370-Eastern Washington University
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years	0.0	0.0	0.0	0.0	0.0
<b>Account</b>					
General Fund-State 001-1	0	2,695	2,695	4,600	4,600
<b>Total \$</b>	0	2,695	2,695	4,600	4,600

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
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- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Alexandra Rosebrook	Phone: (509) 359-7364	Date: 02/20/2020
Agency Approval: Alexandra Rosebrook	Phone: (509) 359-7364	Date: 02/20/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.

Proposed substitute bill compared to previous proposed bill:

Section 3 removes the Council of Presidents and includes the financial aid experts from public four-year and two-year institutions of higher education, as well as independent colleges of Washington State to develop clear, consistent definitions for institutions to adopt regarding financial aid package award letters.

### II. B - Cash receipts Impact

Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.

### II. C - Expenditures

Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.

Eastern Washington University currently conducts financial aid sessions at many local high schools therefore, even if we were asked to conduct these sessions, no additional personnel costs for these sessions are anticipated.

Eastern Washington University would be required to make some modifications to the web design and processing coding which would result in about 40 of information technology time, salary \$1,800 and related benefits \$500. Eastern also anticipates having additional printing and materials cost of \$7,000 per year. The lead agency assumes one in person meeting with up to three other webinars for the collaboration, one Eastern staff person will incur travel costs for a day trip to the Seattle area, flight \$300, rental car \$75 and lunch \$20. The personnel cost related to these meetings will be absorbed within current resources.

## Part III: Expenditure Detail

### III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	2,695	2,695	4,600	4,600
Total \$			0	2,695	2,695	4,600	4,600

### III. B - Expenditures by Object Or Purpose

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years		0.0	0.0	0.0	0.0
A-Salaries and Wages		1,800	1,800	3,600	3,600
B-Employee Benefits		500	500	1,000	1,000
C-Professional Service Contracts					
E-Goods and Other Services					
G-Travel		395	395		
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
Total \$	0	2,695	2,695	4,600	4,600

**III. C - Operating FTE Detail:** *List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA*

Job Classification	Salary	FY 2020	FY 2021	2019-21	2021-23	2023-25
Information Technology Specialist	92,375		0.0	0.0	0.0	0.0
<b>Total FTEs</b>			0.0	0.0	0.0	0.0

**III. D - Expenditures By Program (optional)**

NONE

**Part IV: Capital Budget Impact**

**IV. A - Capital Budget Expenditures**

NONE

**IV. B - Expenditures by Object Or Purpose**

NONE

**IV. C - Capital Budget Breakout**

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

**Part V: New Rule Making Required**

# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 375-Central Washington University
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years	0.0	0.1	0.0	0.0	0.0
<b>Account</b>					
General Fund-State 001-1	0	7,838	7,838	0	0
<b>Total \$</b>	0	7,838	7,838	0	0

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Lisa Plesha	Phone: (509) 963-1233	Date: 02/20/2020
Agency Approval: Lisa Plesha	Phone: (509) 963-1233	Date: 02/20/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

The changes to S SB 6141 as adopted, strike "council of presidents" and inserts "financial aid experts from public four-year and two-year institutions of higher education, as well as independent colleges in Washington state" as being required to collaborate with WSAC on the development of standardized award letters and uniform terminology as outlined in Section 3(1). Additionally, the changes replace "standards" with "definitions" with regard to consistency in the financial aid award letter standardized templates the institutions will adopt.

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

### II. C - Expenditures

*Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.*

Section 3 (1) requires financial aid experts from public four-year and two-year institutions of higher education and WSAC to develop clear, consistent definitions for financial aid award letters that institutions of higher education will adopt. Additionally (2) by July 1, 2021 all public four-year and two-year institutions of higher education must adopt uniform terminology and a standardized template for financial aid awards for easy comparison.

Cost to attend the Seattle meeting would include travel time of the Director and Associate Director of Student Financial Services, including per diem, for a total cost of \$265.05 (214 miles round trip at \$0.575 per mile plus \$71 per employee;  $214 * .575 = \$123.05 + \$142 \text{ per diem} = \$265.05$ ). The Seattle meeting and web based meetings plus 4 hours of pre and post meeting preparation for each meeting represent total cost of (.02 FTE Director & .02 FTE Associate Director for 4 all day meetings + 4 hours of pre/post meeting prep per meeting;  $\$2300 + 33\% \text{ benefits rate for Director salary and } \$1600 + 33\% \text{ benefits rate for Associate Director salary}$ ). Total cost for meetings \$5,452.05

Additional costs include the implementation of the standardized award template in the system, testing the template in existing communications, replacing all old terminology with the uniform terminology established by the public four and two-year institutions on all relevant websites and supplementary communications sent to students. CWU estimates these modifications and enhancements taking approximately 40 hours to complete of an IT Application Development-Entry Range 04IT ( $40/2080 = .02 \text{ FTE} * \$89,688 = \$1794 + 33\% \text{ benefits rate} = \$2386$ ).

## Part III: Expenditure Detail

### III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	7,838	7,838	0	0
Total \$			0	7,838	7,838	0	0

**III. B - Expenditures by Object Or Purpose**

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years		0.1	0.0		
A-Salaries and Wages		5,694	5,694		
B-Employee Benefits		1,879	1,879		
C-Professional Service Contracts					
E-Goods and Other Services					
G-Travel		265	265		
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
<b>Total \$</b>	0	7,838	7,838	0	0

**III. C - Operating FTE Detail:** *List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA*

Job Classification	Salary	FY 2020	FY 2021	2019-21	2021-23	2023-25
Financial Aid Associate Director	80,000		0.0	0.0		
Financial Aid Director	115,000		0.0	0.0		
IT Application Development-Entry	89,688		0.0	0.0		
<b>Total FTEs</b>			0.1	0.0		0.0

**III. D - Expenditures By Program (optional)**

NONE

**Part IV: Capital Budget Impact****IV. A - Capital Budget Expenditures**

NONE

**IV. B - Expenditures by Object Or Purpose**

NONE

**IV. C - Capital Budget Breakout**

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

**Part V: New Rule Making Required**

# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 376-The Evergreen State College
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years	0.0	0.0	0.0	0.0	0.0
<b>Account</b>					
General Fund-State 001-1	0	2,442	2,442	0	0
<b>Total \$</b>	0	2,442	2,442	0	0

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Laura Coghlan	Phone: (360) 867-6510	Date: 02/21/2020
Agency Approval: Holly Joseph	Phone: 360-867-6652	Date: 02/21/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

The amendment clarifies in Section 2 that public and independent college and university financial aid experts will be consulted during the development of consistent definitions for financial aid package letters. Such consultation was previously assumed when determining the impact of the bill, thus there is no change to our previous fiscal note based on the amendment.

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Section 2 adds a new section to RCW 28B.77 which directs the Washington Student Achievement Council to develop a centralized online calculator tool to estimate combined financial aid from federal Pell grant and Washington College grant programs. The tool is for estimation purposes and is not a guarantee of aid. The calculator is anonymous and may not be used to collect or share data.

Section 3(1) adds a new section to RCW 28B.77 which directs WSAC to collaborate with the Council of Presidents to develop clear, consistent standards for financial aid package award letters.

Section 3(2) adds a new section to RCW 28B.77 which requires all public four-year and two-year colleges and independent colleges in WA to adopt uniform terminology and template for financial aid award letters by July 1, 2021.

The lead agency, WSAC, assumes 1 in-person meeting in the Seattle area and up to three other webinars for the collaboration with 4 year public colleges and Council of Presidents as outlined in Section 3. Evergreen will participate in the inter-agency collaboration to develop consistent standards for financial aid letters, uniform terminology, and a standardized template for financial aid awards for implementation by July 1, 2021.

Fiscal impact estimate includes mileage and parking for one FY21 inter-agency meeting in Seattle area, and 30 hours of IT developer time to design and format template, integrate with student information system, and complete testing.

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

### II. C - Expenditures

*Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.*

Fiscal impact estimate includes mileage and parking for one FY21 inter-agency meeting in Seattle area and 30 hours (.02 FTE) of entry level IT developer time (range 4) to design and format template, integrate with student information system, and complete testing. Wage, benefits, and travel reimbursement rates are based on current FY20 figures and are not adjusted for potential increases or inflation.

In the event that the financial aid letter requires more postage to mail or cost to copy than our existing notices,



there could be additional fiscal impact, but no such expenses are included because the materials to be mailed have not yet been designed.

Financial aid programs, policy, and eligibility parameters change regularly. Beyond initial implementation, it is probable that subsequent meetings of collaborators might be needed to update terminology, language, content elements, or template design with common standards. Fiscal impact of future inter-agency meetings is indeterminate. We estimate 8 hours of IT developer time in each fiscal year post-implementation in order to complete upgrades and testing; however, provided that the template is able to be updated in-house and updates are minimal, we believe further updates should fit within the work we already do.

## Part III: Expenditure Detail

### III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	2,442	2,442	0	0
<b>Total \$</b>			0	2,442	2,442	0	0

### III. B - Expenditures by Object Or Purpose

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years		0.0	0.0		
A-Salaries and Wages		1,741	1,741		
B-Employee Benefits		596	596		
C-Professional Service Contracts					
E-Goods and Other Services					
G-Travel		105	105		
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
<b>Total \$</b>	0	2,442	2,442	0	0

### III. C - Operating FTE Detail: *List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA*

Job Classification	Salary	FY 2020	FY 2021	2019-21	2021-23	2023-25
IT App Development - Entry	87,072		0.0	0.0		
<b>Total FTEs</b>			0.0	0.0		0.0

### III. D - Expenditures By Program (optional)

NONE

## Part IV: Capital Budget Impact

### IV. A - Capital Budget Expenditures

NONE

### IV. B - Expenditures by Object Or Purpose

NONE

### IV. C - Capital Budget Breakout

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

## **Part V: New Rule Making Required**

# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 380-Western Washington University
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years	0.1	0.0	0.1	0.0	0.0
<b>Account</b>					
General Fund-State 001-1	0	9,252	9,252	8,758	8,758
<b>Total \$</b>	0	9,252	9,252	8,758	8,758

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Kristen Stouder	Phone: (360) 650-2811	Date: 02/21/2020
Agency Approval: Ted Castro	Phone: (360) 650-4694	Date: 02/21/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

6141 S SB AMS RAND makes the following amendments to S SB 6141, neither of which impact our response on this fiscal note:

- Section 3(1) now indicates that Financial Aid Experts will collaborate with the Washington Student Achievement Council to collaborate on the development of standardized financial aid award packages.
- Section 3(1) strikes the word "standards" and inserts the word "definitions" on line 23.

Section 3(2) of requires that by July 1, 2021, institutions of higher education must adopt uniform terminology and a standardized template for financial aid award packages.

For purposes of this fiscal note, Western is using the same lead agency assumptions as SB 6141, which we have been told will encompass the work described in Section 3 of this bill: Western assumes 1 in-person meeting in the Seattle area and up to three other webinars for the collaboration with 4 year institutions of higher education in order to meet the requirements of Section 3(2).

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

### II. C - Expenditures

*Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.*

Western Washington University estimates operating costs in the following areas:

FY2021:

Costs of coordinating with the Washington Student Achievement Council (WSAC) in development of new tool and implementation of standardized template for financial aid award packages as described in Section 3:

Salaries & Benefits: \$8,758 (\$6,587 salaries, \$2,171 benefits)

\$1,753 for Assistant Vice President of Enrollment & Student Services to attend the in-person meeting in Seattle, follow up webinars, and discussion with internal staff to coordinate implementation (20 hours).

\$1,983 for Associate Director of Financial Aid (systems) for technical collaboration in tool implementation (32 hours).

\$1,621 for IT Business Analyst to perform technical collaboration and support in tool implementation (32 hours).

\$1,629 for Management Analyst 4 for technical collaboration and support in tool implementation (32 hours).

\$1,771 for Senior Systems Analyst to perform all programming changes necessary to implement and update tool for integration into student information system (30 hours).

\$494.20 Travel costs associated for one in-person meeting in the Seattle area for the Assistant Vice President of Enrollment & Student Services to attend, assuming the meeting may require overnight lodging. This includes:

Mileage: \$101.2 (\$.575 per mile for 176 miles, round trip), Per diem \$76 (for King County), Lodging \$257 (King

County), Parking \$60

FY2022 and subsequent years:

For each subsequent year starting in FY2022, Western estimates the salary and benefit costs to be approximately half of what is estimated for the implementation year of FY2021 for a total of \$4,379 per fiscal year). This will include work for required adjustments, ongoing communication with WSAC and other agencies, testing, and template updates.

### Part III: Expenditure Detail

#### III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	9,252	9,252	8,758	8,758
Total \$			0	9,252	9,252	8,758	8,758

#### III. B - Expenditures by Object Or Purpose

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years	0.1	0.0	0.1	0.0	0.0
A-Salaries and Wages		6,587	6,587	6,588	6,588
B-Employee Benefits		2,171	2,171	2,170	2,170
C-Professional Service Contracts					
E-Goods and Other Services					
G-Travel		494	494		
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
Total \$	0	9,252	9,252	8,758	8,758

**III. C - Operating FTE Detail:** List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA

Job Classification	Salary	FY 2020	FY 2021	2019-21	2021-23	2023-25
Assistant Vice President, Enrollment & Student Ser	141,123	0.0		0.0		
Associate Director of Financial Aid	96,924	0.0	0.0	0.0	0.0	0.0
IT Business Analyst	77,508	0.0	0.0	0.0	0.0	0.0
Management Analyst 4	77,952	0.0	0.0	0.0	0.0	0.0
Senior Systems Analyst	93,435	0.0		0.0		
Total FTEs		0.1	0.0	0.1	0.0	0.0

#### III. D - Expenditures By Program (optional)

NONE

### Part IV: Capital Budget Impact

#### IV. A - Capital Budget Expenditures

NONE

**IV. B - Expenditures by Object Or Purpose**

NONE

**IV. C - Capital Budget Breakout**

*Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods*

NONE

**Part V: New Rule Making Required**

# Individual State Agency Fiscal Note

<b>Bill Number:</b> 6141 S SB AMS RAND S6764.1	<b>Title:</b> Higher education access	<b>Agency:</b> 699-Community and Technical College System
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## Part I: Estimates

☐ No Fiscal Impact

### Estimated Cash Receipts to:

NONE

### Estimated Operating Expenditures from:

	FY 2020	FY 2021	2019-21	2021-23	2023-25
<b>Account</b>					
General Fund-State 001-1	0	30,000	30,000	0	0
<b>Total \$</b>	0	30,000	30,000	0	0

### Estimated Capital Budget Impact:

NONE

*The cash receipts and expenditure estimates on this page represent the most likely fiscal impact. Factors impacting the precision of these estimates, and alternate ranges (if appropriate), are explained in Part II.*

Check applicable boxes and follow corresponding instructions:

- ☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form Parts I-V.
- ☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).
- ☐ Capital budget impact, complete Part IV.
- ☐ Requires new rule making, complete Part V.

Legislative Contact: Michele Alishahi	Phone: 360-786-7433	Date: 02/18/2020
Agency Preparation: Brian Myhre	Phone: 360-704-4413	Date: 02/20/2020
Agency Approval: Cherie Berthon	Phone: 360-704-1023	Date: 02/20/2020
OFM Review: Breann Boggs	Phone: (360) 902-0659	Date: 03/01/2020

## Part II: Narrative Explanation

### II. A - Brief Description Of What The Measure Does That Has Fiscal Impact

*Briefly describe by section number, the significant provisions of the bill, and any related workload or policy assumptions, that have revenue or expenditure impact on the responding agency.*

The substitute bill, as amended, differs from the substitute original in the following ways:

- Adds public two-year and four-year institutions of higher education, and independent colleges, to the stakeholders who must be consulted on the financial aid award letter standardization
- States that WSAC and stakeholders will develop consistent definitions, to be used in financial aid award letters, rather than developing consistent standards.

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This bill would direct several actions to help improve financial aid awareness and increase coordination among schools, districts, agencies and institutions of higher education.

#### Section 3

The Washington Student Achievement Council would be required to develop clear, consistent definitions for institutions of higher education to adopt for financial aid package award letters. By July 1, 2021, all public four-year and two-year institutions of higher education must adopt uniform terminology and a standardized template for financial aid award packages.

### II. B - Cash receipts Impact

*Briefly describe and quantify the cash receipts impact of the legislation on the responding agency, identifying the cash receipts provisions by section number and when appropriate the detail of the revenue sources. Briefly describe the factual basis of the assumptions and the method by which the cash receipts impact is derived. Explain how workload assumptions translate into estimates. Distinguish between one time and ongoing functions.*

No cash receipts impact.

### II. C - Expenditures

*Briefly describe the agency expenditures necessary to implement this legislation (or savings resulting from this legislation), identifying by section number the provisions of the legislation that result in the expenditures (or savings). Briefly describe the factual basis of the assumptions and the method by which the expenditure impact is derived. Explain how workload assumptions translate into cost estimates. Distinguish between one time and ongoing functions.*

This bill would have the following expenditure impacts.

#### Section 3

The Washington Student Achievement Council (WSAC) would be required to develop consistent definitions for institutions of higher education to adopt for financial aid package award letters. Staff from each college's financial aid departments will have to collaborate with WSAC to assist in developing consistent terminology and standardized financial aid award letters. WSAC assumes there will be four meetings to accomplish the work required.

Based on lead agency assumptions, we estimate that participation in the four meetings to develop a standardized template for financial aid award letters, would require approximately 20 hours of meeting attendance, preparation and travel.

Financial Aid Director Salary - \$40/hour, 20 hours = \$800. For 34 colleges, the total cost would be \$27,000.



The changes in this bill would also require reprogramming financial aid award letter templates as well as financial aid coding titles and descriptions in both the Legacy and PeopleSoft systems.

We estimate 30 hours of work in each system by an IT Functional Analyst at \$45/hour.

(30 hours X 2 systems = 60 hours)

\$45/hour X 60 hours = \$3,000 (rounded to nearest thousand).

#### TOTAL COSTS

\$27,000 + \$3,000 = \$30,000 one-time costs

### Part III: Expenditure Detail

#### III. A - Operating Budget Expenditures

Account	Account Title	Type	FY 2020	FY 2021	2019-21	2021-23	2023-25
001-1	General Fund	State	0	30,000	30,000	0	0
<b>Total \$</b>			0	30,000	30,000	0	0

#### III. B - Expenditures by Object Or Purpose

	FY 2020	FY 2021	2019-21	2021-23	2023-25
FTE Staff Years					
A-Salaries and Wages		30,000	30,000		
B-Employee Benefits					
C-Professional Service Contracts					
E-Goods and Other Services					
G-Travel					
J-Capital Outlays					
M-Inter Agency/Fund Transfers					
N-Grants, Benefits & Client Services					
P-Debt Service					
S-Interagency Reimbursements					
T-Intra-Agency Reimbursements					
9-					
<b>Total \$</b>	0	30,000	30,000	0	0

**III. C - Operating FTE Detail:** List FTEs by classification and corresponding annual compensation. Totals need to agree with total FTEs in Part I and Part IIIA

NONE

#### III. D - Expenditures By Program (optional)

NONE

### Part IV: Capital Budget Impact

#### IV. A - Capital Budget Expenditures

NONE

#### IV. B - Expenditures by Object Or Purpose

NONE

#### IV. C - Capital Budget Breakout

Identify acquisition and construction costs not reflected elsewhere on the fiscal note and describe potential financing methods

Higher education access

Form FN (Rev 1/00) 159,949.00

FNS063 Individual State Agency Fiscal Note

699-Community and Technical College System

Request # 71-1

Bill # 6141 S SB AMS RAND S6764.1

NONE

## **Part V: New Rule Making Required**