

FY21 Summer 2020 EOF B2 Contract Budget Training

WEBINAR

NEW JERSEY OFFICE OF THE SECRETARY OF HIGHER EDUCATION (OSHE)
EDUCATIONAL OPPORTUNITY FUND (EOF) PROGRAM

OSHE/EOF Central Office Staff

Website: http://www.state.nj.us/highereducation/EOF/EOF_Program_Resources.shtml

EOF Central Office Staff:

Dr. Hasani Carter

Hasani.Carter@oshe.nj.gov

(609) 341-3808

Dr. Stephanie Shanklin

Stephanie.Shanklin@oshe.nj.gov

(609) 984-3751

Hema Patel

Hema.Patel@oshe.nj.gov

(609) 984-3751

Shakia Williams

Shakia.Williams@oshe.nj.gov

(609) 984-2631

EOF receives assistance from
OSHE Department of Budget &
Finance

OSHE Budget & Finance:

Angela Bethea

Angela.Bethea@oshe.nj.gov

Maisha Howard

Maisha.howard@oshe.nj.gov

(609) 292-8916

Kelechi Unegbu

Kelechi.Unegbu@oshe.nj.gov

(609) 633-9528

Please note that due to the impact of COVID-19, all OSHE staff are working remotely. The best way to contact us is via email.

Purpose of this workshop

- To provide a general orientation to the EOF B2 Summer Budget Contract Attachment
- Review the changes that have been added
- Discussion about the importance of submitting documents on time and review of submission deadlines

[Employment Opportunities](#)
[Public Information and Media Requests](#)
[Degree Program Inventory/Institutional Research/Statistics](#)
[NJ Colleges & Universities](#)
[Licensure](#)
[Educational Opportunity Fund](#)
[Student Programs/ Governor's School/ College Access Challenge Grant](#)
[GEAR UP](#)
[Community College Opportunity Grant](#)
[NJ STEM Pathways Network](#)
[Higher Education Initiatives](#)
[Other Resources/Popular Links](#)
[Archives](#)
[New Jersey Tuition Equality Act](#)
[NJ Student Learning Standards/NJ Educator Resource Exchange](#)
[Troops to College Information for Veterans](#)
[State Authorization Reciprocity Agreement \(SARA\)](#)
[Staff Directory](#)
[Complaint Form](#)

Campus Program Resources

EOF CONTRACTS AND BUDGETS



- [EOF Time and Effort Report](#) 
- [Fiscal Year EOF Contract Agreements](#)
- [Fiscal Year EOF Contract Budget Instructions](#) 
- [EOF Budget Workshop](#) 
- [Budget and Expenditure Forms](#)

EOF Program Liaisons - Institutional Assignments

- [EOF Program Liaison Assignments](#) 

Check for potential re-assignments









EOF Winter Session Funding Application

- [EOF Winter Session Budget Application Instructions](#) 
- [Fiscal Year Contract Attachment B5 – Winter Session](#) 

EOF ANNUAL REPORT

- [2017-2018 Annual Report](#) 
- [2017-2018 Annual Report Instructions](#) 
- [EOF NJFAMS Final Enrollment Report – How to use Excel Auto Filtering](#) 
- [EOF NJFAMS Final Enrollment Report Instructions for Institutions **WITH** Multiple EOF Campus Programs](#) 
- [EOF NJFAMS Final Enrollment Report Instructions for Institutions \(Non Multi-Campus\)](#) 

EOF STUDENT PAYMENT PROCESS

- [Institutions participating in EOF Part-time](#) 
- [EOF Undergraduate Academic Year Grant Processing Calendar](#) 
- [NJ FAMS EOF ACCESS FORM](#) 
- [2018-2019 EOF Graduate Grant Application Instructions](#) 
- [NJFAMS EOF Roster Selection, Awarding, Certification and Payment Request Instructions](#) 
- [NJFAMS EOF Approved and Eligible Roster Processing Request Form](#) 
- [EOF Student Appeal Form](#) 
- [EOF NJFAMS Selection Awarding Certifying and Payment Request Training](#) 

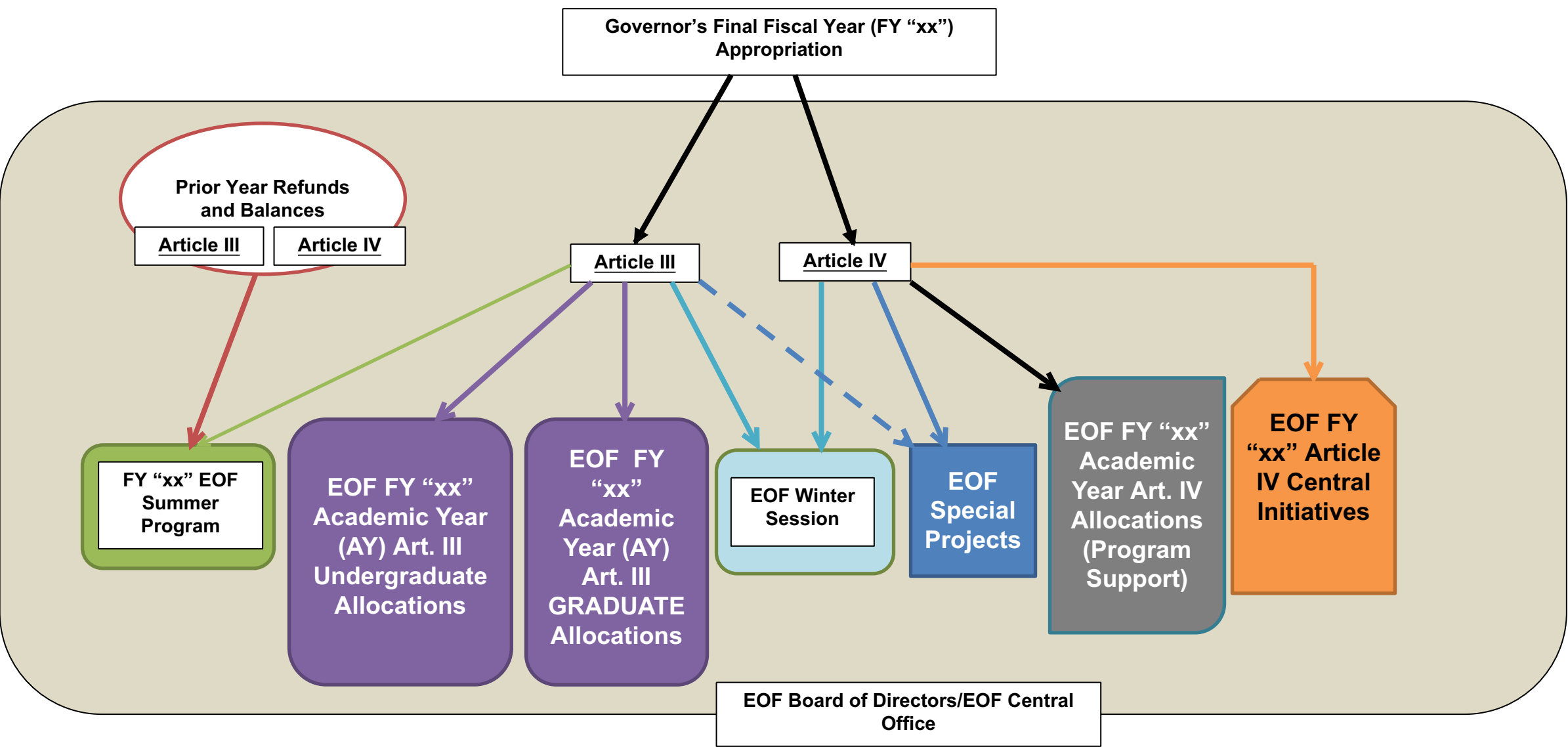
FY21 EOF Program Liaison Assignments

EOF Program Liaison Assignments*

(* = Assignments are subject to change at the discretion of the OSHE/EOF Central Office)

HEMA PATEL Email: hema.patel@oshe.nj.gov	STEPHANIE SHANKLIN Email: stephanie.shanklin@oshe.nj.gov
Bergen Community College	Atlantic Cape Community College
Brookdale Community College	Bloomfield College
Essex County College	Caldwell University
Fairleigh Dickinson University - Florham	Camden County College
Fairleigh Dickinson University - Metropolitan	Centenary University
Hudson County Community College	College of St. Elizabeth
Kean University	County College of Morris
Mercer County Community College	Drew University
Montclair State University	Felician University
Montclair State University - Health Careers Program	Georgian Court University
New Jersey City University	Middlesex County College
New Jersey Institute of Technology	Morris University
Ocean County College	Ramapo College of New Jersey
Passaic County Community College	Rider University
Raritan Valley Community College	Rider University - Westminster Choir Campus
Rutgers University - Camden	Rowan College at Burlington County
Rutgers University - College of Nursing	Rowan College of South Jersey - Cumberland
Rutgers University - Graduate Bio-medical	Rowan College of South Jersey - Gloucester
Rutgers University - Graduate Education Prep	Rowan School of Osteopathic Medicine (SOM) - Graduate (Only)
Rutgers University - Graduate Studies (except Bio-medical)	Rowan School of Osteopathic Medicine (SOM) - Pre-Matric
Rutgers University - Newark	Rowan School of Osteopathic Medicine (SOM) - Summer Prep
Rutgers University - ODASIS	Rowan University - Cooper Medical School - Graduate (Only)
Rutgers University - Office of EOF Administration	Rowan University - Cooper Medical School - PULSE Program
Rutgers University - Robert Wood Johnson Medical School	Rowan University - Graduate Bio-medical
Rutgers University - School of Arts and Sciences (New Brunswick)	Rowan University - Camden
Rutgers University - School of Engineering	Rowan University - Glassboro
Rutgers University - School of Environmental and Biological Sciences	Saint Peter's University
Rutgers University - School of Health Professions	Salem Community College
Rutgers University - School of Pharmacy	Seton Hall - Law
Rutgers University - Summer Grads	Seton Hall University - Main
Sussex County Community College	Seton Hall University - Pre-Legal
The College of New Jersey	Seton Hall University - Pre-Med/Pre-Dent Plus
Union County College	Stevens Institute of Technology
Warren County Community College	Stockton University - Atlantic City
William Paterson University	Stockton University - Galloway

EOF Fiscal Distribution Chart



Impact of COVID-19

- Due to the impact of COVID-19, the Educational Opportunity Fund has made a number of adjustments to the submission deadline for all FY21 contract attachments.
- This information can be found within the EOF Fiscal Year Budget Instructions located on our EOF Campus Program Resources webpage:
https://www.nj.gov/highereducation/EOF/EOF_Program_Resources.shtml
- Currently, programs can begin working on their B1 (Mission and Goals) and B2 (EOF Summer Program) contract attachments.
- Information needed to complete the B3 (Academic Year Art. IV Program Support) contract attachment is forthcoming.




Where can I find the EOF Contract Attachments?

All EOF Contract Budget Attachments can be found on the EOF Campus Program Resources webpage, within the EOF Contracts and Budgets section:

https://www.nj.gov/highereducation/EOF/EOF_Program_Resources.shtml

Campus Program Resources

EOF CONTRACTS AND BUDGETS

- [EOF Time and Effort Report](#) 
 - [Fiscal Year EOF Contract Agreements](#)
 - [Fiscal Year EOF Contract Budget Instructions](#) 
 - [EOF Budget Workshop](#) 
 - [Budget and Expenditure Forms](#)
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EOF B1 Contract Attachment (Mission and Goals)

Contract Budget Attachment B1 –

EOF PROGRAM MISSION STATEMENT & SUPPORT SERVICES (RESPOND TO 4 QUESTIONS)

Describe the overall purpose of the campus-based EOF program

Describe how your program's mission supports the overall mission of your institution

Describe how your program's mission relates to the OSHE/EOF mission

List the services to be provided during FY21

EOF PROGRAM GOALS & OBJECTIVES

7 Mandatory Goals

1. Pre-freshman & Renewal Summer Program
2. Recruitment and Admission
3. Assessment of Student Learning and Developmental Skills – Academic Support
4. Student Learning and Development – Counseling Component
5. Plans to address student retention: Program Retention Goals (Actual Percentages are required)
6. Plans to address student persistence and time to completion (Percentage of Students to achieve SAP is required)
7. Plans to address student graduation (or transfer to a senior institution if applicable), and student participation in graduate/professional school/post-graduate training and career planning

EOF B1 Contract Attachment

https://www.nj.gov/highereducation/EOF/EOF_Forms.shtml

REMINDER - B1 CONTRACT ATTACHMENT DUE DATE

**B1 CONTRACT ATTACHMENTS MUST BE EMAILED TO YOUR
PROGRAM LIAISON BY:**

Thursday, October 22, 2020

EOF B2 Contract Attachment (2020 EOF Summer Program)

Components of Contract Attachment B2- Summer Program

SUMMER PROGRAM

SUPPORT SERVICES

Personnel salaries & wages (*do not include instructors' salaries for cost of instruction if students are charged tuition for the course*)

Educational materials & supplies (do not include cost of textbooks for initial & renewal summer program participants)

Other administrative costs

INITIAL & RENEWAL

COST OF EDUCATION

Tuition

Fees

Room

Board

Books

Stipends

Insurance

Disbursement of 2020 Summer Program Funds

- Historically speaking, Article III Summer program funds are disbursed in two installments. However, based on the Fund's available resources and due to the impact of COVID-19, EOF Central has processed a payment to all EOF summer programs for both Art. 3 and Art. 4 from its available FY20 resources.
- Due to the impact of COVID-19, EOF campus programs should develop their 2020 EOF Summer Program budget based on their preliminary FY21 2020 Summer Budget allocations. This information was provided to programs via the April 23, 2020 EOF Board materials.
- Should additional resources be made available, the EOF Central Office will inform all programs accordingly.

Summer Program Article 3 and 4 Allocation

- A number of institutions and programs have been identified to receive Article 4 funding for the Summer.
- Summer Article 4 funds can only be used on the EOF Program Support tab (i.e. toward program support).
- Programs are reminded that the regulations that govern the usage of EOF Art. IV funds remain the same throughout the year.
- Summer Art. 3 funds may be used for both EOF Program Support and Cost of Education items for initials and renewals.
- **New for Summer 2020:** a) Due to the impact of COVID-19, EOF Board approved special allowance for campus programs to use EOF summer funds to support EOF 12-month campus staff; b) EOF Tables T1 and T2

EOF Summer B2 Budget

https://www.nj.gov/highereducation/EOF/EOF_Forms.shtml

Due to the impact of COVID-19 – EOF Board approved special allowance for Summer 2020

- Due to the impact of COVID-19, EOF campus programs have the flexibility to use EOF summer funds to fund 12-month campus program staff during the summer.
- 12-month EOF campus program staff must have appeared on the campus program's FY20 Academic Year (AY) Article IV B3 contract attachment.
- The compensation offered must be proportional to the compensation that would have been provided if the individual would have normally been funded on the EOF campus program's AY Article IV B3 contract attachment.
- 12-month EOF campus program staff that are funded via EOF summer funds may not be mixed funded with FY21 EOF AY Article IV program support funds and can only be funded for the time period of July 1, 2020 through September 30, 2020 via EOF summer funds.
- If this allowance is utilized, EOF campus programs will need to ensure that both the EOF FY21 2020 Summer program B2 contract attachment and EOF FY21 AY Art. 4 B3 (Program Support) contract attachment properly reflect this information.
- Regulations requiring the institution to cover 100% of the EOF UG campus program director's compensation remain in effect.

Example of how to display a Summer funded EOF 12-month staff member on the B2 and B3 contract attachments

CONTRACT ATTACHMENT B2

Page 1

NEW JERSEY EDUCATIONAL OPPORTUNITY FUND

FY 21 (FYS 20 & 21) - SUMMER 2020

SUMMER SUPPORT and COST OF EDUCATION

INSTITUTION:

UNIVERSITY OF NEW JERSEY

I. PERSONNEL (names & titles)		Amount charged to.....				TOTAL FUNDING
SUMMER PROGRAM SUPPORT SERVICES		% Time EOF	EOF		INSTITUTION	
			ART. III	ART. IV*	OTHER RESOURCES	
COUNSELING:						
John Doe (EOF AY 12-MONTH STAFF - EOF Summer Funded from July 1 - Sept. 30 2020)		100	\$ 7,500.00			\$ -
Jane Smith (EOF AY 12-Month Staff - EOF Summer Funded from July 1 - September 30, 2020)		50	\$ 4,500.00			\$ 7,500.00
						\$ 4,500.00
						\$ -
						\$ -
						\$ -
						\$ -
COUNSELING SUB-TOTAL:			\$ 12,000.00	\$ -	\$ -	\$ 12,000.00

For EOF 12-Month staff --- Programs must indicate the period of time the individual received Summer Funds

%Time and salary should reflect how the person appears on the B3 contract attachment

Example of how to display a Summer funded EOF 12-month staff member on the B2 and B3 contract attachments (continued)

CONTRACT ATTACHMENT B3

Page 1

***SPEND DOWN OPTION:** To help monitor the funds as you construct your budget, enter the total allocation in column "D", cell # 6. The remaining end of this budget form.*

I. PERSONNEL (provide names & titles)

COUNSELING SALARIES:

Include all professional and peer counselors, acad. advisors and acad. dev. specialists. Enter name and title for each position.

	Annual Salary in dollars	% Time EOF	EOF	INSTITUTION	OTHER RESOURCES	TOTAL FUNDING
John Doe (EOF AY 12-MONTH STAFF - EOF Summer Funded from July 1 - Sept. 30 2020)	60000	100	\$ 22,500	\$ 30,000		\$ 52,500
Jane Smith (EOF AY 12-Month Staff - EOF Summer Funded from July 1 - September 30, 2020)	36000	50	\$ 13,500	\$ -		\$ 13,500
						\$ -
						\$ -
Counseling Salaries Sub-total:			\$ 36,000	\$ 30,000	\$ -	\$ 66,000

If a position was funded with Summer EOF funds, you must display the dates to reflect how a portion of the salary was funded. Programs may not mix fund a position (i.e. Use EOF Summer Funds and EOF AY Art. IV program (B3) contract funds during the summer or AY)

NATIONAL OPPORTUNITY FUND

ARTICLE IV ACADEMIC YEAR

INSTITUTIONAL SUPPORT BUDGET

University of New Jersey

charged to.....

John Doe (100% time EOF):

Annual salary is shared at a rate of 50% EOF and 50% institution (i.e. \$30,000 each). Total Annual salary = \$60k. This equates to \$5k per month. This position was funded with EOF funds during the summer @ \$2500 per month for 3 months). Thus the EOF AY Funds is reduced by \$7,500 (30k – \$7,500 = \$22.5k). The institution's summer contribution to the position during the summer is accounted for within the Institutional column on the B3 Contract.

Example of how to display a Summer funded EOF 12-month staff member on the B2 and B3 contract attachments (continued)

CONTRACT ATTACHMENT B3

Page 1

***SPEND DOWN OPTION:** To help monitor the funds as you construct your budget, enter the total allocation in column "D", cell # 6. The remainder of this budget form.*

I. PERSONNEL (provide names & titles)

COUNSELING SALARIES:

Include all professional and peer counselors, acad. advisors and acad. dev. specialists. Enter name and title for each position.

	Annual Salary in dollars	% Time EOF	EOF	INSTITUTION	OTHER RESOURCES	TOTAL FUNDING
John Doe (EOF AY 12-MONTH STAFF - EOF Summer Funded from July 1 - Sept. 30 2020)	60000	100	\$ 22,500	\$ 30,000		\$ 52,500
Jane Smith (EOF AY 12-Month Staff - EOF Summer Funded from July 1 - September 30, 2020)	36000	50	\$ 13,500	\$ -		\$ 13,500
						\$ -
						\$ -
Counseling Salaries Sub-total:			\$ 36,000	\$ 30,000	\$ -	\$ 66,000

If a position was funded with Summer EOF funds, you must display the dates to reflect how a portion of the salary was funded. Programs may not mix fund a position (i.e. Use EOF Summer Funds and EOF AY Art. IV program (B3) contract funds during the summer or AY)

NATIONAL OPPORTUNITY FUND

ARTICLE IV ACADEMIC YEAR

STATE SUPPORT BUDGET

University of New Jersey

charged to.....

Jane Smith (50% time EOF):

Annual salary is \$36k. Since the position is 50% time EOF, only half of the annual salary can be counted for EOF purposes (i.e. \$36k x 50% = \$18,000 (\$1,500/month for 12 months). This amount is funded entirely through EOF funds. This position was funded with EOF funds during the summer @ \$1,500 per month for 3 months). As a result, the EOF AY Art 4 Funds is reduced by \$4.5k (\$18k – \$4,500 = \$13.5k). So only \$13.5k should appear on the B3 contract.

Summer Program Budget Transfers/Modifications/Adjustments


Reminder: Programs must notify their EOF program liaison via e-mail. Summer budget **modification requests** should be submitted by **September 18, 2020**.

Fully explain each change you wish to make:

(i.e. You projected a summer program enrollment of 25 students and you only enrolled 24. This results in \$1,050 being available. Therefore, you are requesting to move \$1,000 of EOF funds from initial student tuition & \$50 of EOF funds from initial student fees to renewal students' books which will result in a grand total of \$1,050 in renewal student book costs funded by EOF)

Response to your budget modification request will be returned by e-mail that should then be attached to your original FY 2021 summer budget contract attachment for reference and audit purposes.

The approved budget modification must be reflected in your summer program expenditure report.



Just a note regarding EOF Summer Program - Stipends

- May not be used to pay or reimburse a student for taking a course at another institution.
- Programs that are interested in assisting students who are eligible to receive summer funding to take a class at **an institution that participates within EOF**, should seek to establish a formal arrangement/agreement. This should allow for the institution to be billed directly for the student's enrollment at another institution/program. If this option is sought, then institutions need to ensure that the appropriate documentation can be accounted for between institutions for audit purposes.
- Article III Funds - Cost of education purposes only (supplies, commuter costs, textbooks)
- Institutions/EOF campus programs assume all liability associated with the distribution of stipends (i.e. future financial aid eligibility, taxes, etc.).
- The EOF Central Office does not determine stipend award levels.

Clarification regarding EOF Funds used to pay for Tuition and Fees

Per 9A:11-6.3(b):

The EOF Article III summer program grant shall be applied to the student's educational costs. Funds awarded for the summer session are to be used solely for courses and educational costs that occur during the summer session. Courses taken during the summer session must be recorded on the students' academic transcripts as completed during the summer session. In the summer, such costs shall include whatever constitutes the participating institution's educational budget and/or instructional costs as follows: 1. Tuition charged per student or instructional costs (that is, instructors' and teaching assistants' salaries), but never both for any single course; 2. Fees, room and board, books, educational supplies, transportation, and child care, as well as stipends and insurance; 3. Salaries, and room and/or board for professional, graduate, and/or peer tutors; and 4. Educational materials used to support instruction.

Clarification regarding EOF Funds used to pay for Tuition and Fees (continued)

- If a student is charged for “X” credits, then this number of credits should appear on the student’s transcript for the Summer program. (i.e. Student is registered for 9 credits. EOF funds are used to pay for 9 credits. Student’s transcript should show that the student has earned 9 credits.)
- If the course is an enrichment course with no credits earned toward the degree, then this should be properly documented (i.e. Developmental Math 0001; 3 credits (P/F)).
- If a student attempts 9 credits and only earns less than 9 credits due to not passing a course, then this should also be reflected on the student’s transcript for the summer.

Summer Program Budget/Report – Due Date Summary:

A draft of your FY21 Summer 2020 EOF B2 Contract Attachment must be e-mailed (in the excel format) to your program liaison and the EOF Executive Director by :

Wednesday, July 15, 2020

A final version of your FY21 Summer 2020 EOF B2 Contract Attachment must be e-mailed to your program liaison and the EOF Executive Director by:

Thursday, October 22, 2020

C1 Contract Attachment (Final Summer 2020 Expenditure Report) must be e-mailed to Maisha Howard (Maisha.Howard@oshe.nj.gov) and your EOF Program liaison (and EOF Executive Director) by:

Monday - November 2, 2020

- **(All contract attachments must be emailed to your program liaison in the original format. Signature pages will be completed and submitted to the EOF Central Office via DocuSign.)**

Reminder: EOF Contract Attachment C1- Summer Program Expenditure Report Due Date

Appears as seven worksheet tabs on contract budget attachment B2

Submission deadline date: Monday, November 2, 2020

Reminders:

On the tab labeled “INT SSR” the total EOF term request column when added should equal the grand total of initial cost of education in the “EOF expended” column of the expenditure report worksheet tab labeled “Sum COE Initials”

Likewise, on the tab labeled “Ren SSR” the grand total should equal the grand total of the renewal cost of education in the “EOF expended” column of the expenditure report worksheet tab labeled “COE Renewals..”

New for Summer 2020: Outcomes Tables T1 & T2 must be completed.

Distribution of EOF Document Submissions –
All Documents must be emailed in their
original format (including all associated tabs).

Attachment B1 – Mission, Goals and Objectives: EOF Program Liaison and EOF Executive Director

**Attachment B2/C1 - Summer Program Final Expenditure Report*: Maisha Howard
(Maisha.Howard@oshe.nj.gov) w/CC to Program Liaison and EOF Executive Director**

*** = Please refrain from including any additional worksheet tabs displaying information not requested on the budget contract attachment.**

Resources

OSHE/EOF Website

http://www.state.nj.us/highereducation/EOF/EOF_Program_Resources.shtml