

Keeping It Standard
How Flexibilities in Standard-Term Programs Can Accommodate Academic Innovation

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Agenda

- Need for innovation
- Flexibilities of standard-term programs
- Nonstandard-term and non-term academic calendars
- Other considerations



Why innovate?

- Changing student demographics
- Shrinking applicant pools
- Financial pressures
- Career-oriented initiatives
- New or under-utilized technologies





Innovation Challenges

- Student information system complexity
- Maintaining disbursement schedules
- Documenting student attendance and withdrawals
- Consumer information and communications
- Compliance concerns

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What is a standard term?

Term:

A discrete period of time during which all courses are scheduled to begin and end

Standard term:

A term of 15 to 17 weeks of instructional time (semester credits)

or

A term of 10 to 12 weeks of instructional time (quarter credits)

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What is not a standard term?

- Terms shorter or longer in instructional weeks than the standard definition
- Standard-length terms where a different type of academic credit is offered
 - E.g., quarter terms with semester credit
- Standard-length terms where full-time undergraduate enrollment status is defined as fewer than 12 credits
- Terms that overlap other terms
- Non-term credit-hour or clock-hour programs offered in modules or term-like formats

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Flexibilities of Standard Terms



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Modules

Module:
A course or courses in a program that do not span the entire length of the term



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Modules: Benefits

- Several short courses can be combined to form a standard term, with or without full-term courses
- Several *overlapping* courses can be combined to form a standard term
- Schools with multiple starts may not need to track separate cohorts
- Students may be better able to balance school and other responsibilities
- Aid disbursements tied to modules can help to support responsible borrowing



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Modules: Benefits

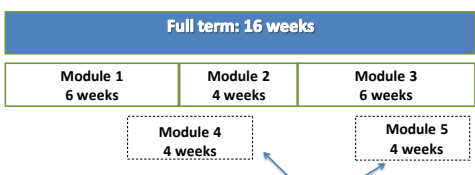
Flexibility in scheduling courses





Modules: Benefits

Flexibility in scheduling courses



In a standard-term program, modules may overlap other modules, but terms may not overlap other terms





Modules: Considerations

- Increased enrollment options
- More complex policies around institutional charges and refunds
- Complex Pell Grant recalculations
- Challenges monitoring withdrawals and applying R2T4 rules
- Cost of attendance and EFC adjustments to reflect only periods a student is attending
- Disbursement timing to reflect actual start dates







Two-week Tolerance

In a standard-term program, courses may be scheduled up to a total of two weeks outside of the regular term dates without having to treat the term as nonstandard.

Standard terms of up to two weeks' difference in length are not treated as nonstandard.

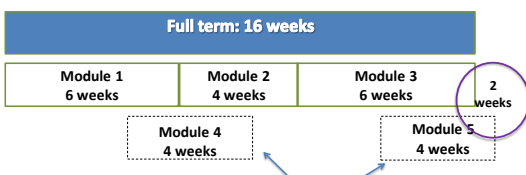
Substantially equal = two weeks

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Two-Week Tolerance

Flexibility in scheduling courses



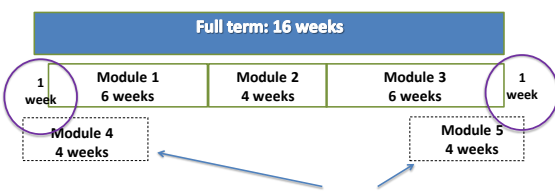
In a standard-term program, courses may extend up to two weeks outside of the term *in total*

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Two-Week Tolerance

Flexibility in scheduling courses



In a standard-term program, courses may extend up to two weeks outside of the term *in total*

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Two-Week Tolerance

1 week 1 week 1 week

Does this calendar reflect a standard-term program? **Yes!**

- Terms are of standard length (15 to 17 weeks)
- In neither term do classes extend outside the regular term dates by more than two weeks
- Terms, including extended courses, do not overlap

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Two-Week Tolerance

1 week 1 week 1 week

Does this calendar reflect a standard-term program? **No!**

- An extended spring term course overlaps the fall term, so the program would be considered non-term

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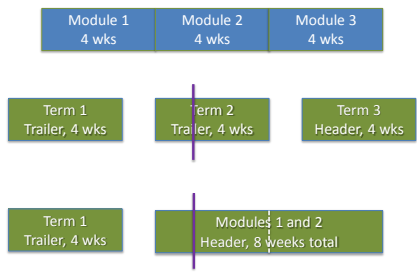
Summer Terms

- Summer terms may be treated as standard regardless of length, *provided full-time status for undergraduates is defined as at least 12 credits for every term*
 - Full-time status may vary in summer for graduate students
- Many calendar options for multiple summer sessions
 - Combine sessions into a single term (modules)
 - Treat each session as a stand-alone term
 - Can be assigned to the same or different academic years depending on whether sessions are crossover periods

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Summer Terms



Summer Terms: Considerations

If multiple summer sessions are offered, these *must* be combined into one term in order to award Direct Loans using a Borrower-Based Academic Year (BBAY1). Otherwise a Scheduled Academic Year (SAY) must be utilized.

- However, BBAYs containing a summer term are not required to be at least 30 weeks in length

Intersessions

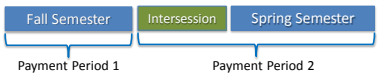
- Courses offered in a term that would otherwise be considered nonstandard may be 'attached' to a standard term
 - Add the intersession to one standard term
 - Treat the entire combined term as one payment period
 - Can be a January session, or sessions at other times of year such as in May





Interessions

- In a standard-term program, adding a term that is immediately prior to, or after, the standard term, and does not overlap with another term, keeps the terms standard



- This does, however, create a term with *modules*
 - Both the Intersession and 'attached' terms are modules
 - The intersession courses may overlap into the 'attached' term

Interessions: Considerations

- Enrollment status reflects enrollment in the Intersession and attached term *combined*
- Cost of Attendance and EFC should reflect only periods the student is attending
- Disbursements may be made up to 10 days prior to the student's first day of classes

Other Standard Term Advantages

- May use Pell Grant Formula 1
- Consistency in disbursement rules across programs
- Flexibility with Scheduled and Borrower Based Academic Years (SAYs and BBAYs) for Direct Loans
 - May use SAYs and BBAYs, or alternate between them
 - May originate single-term loans



Other Standard Term Advantages

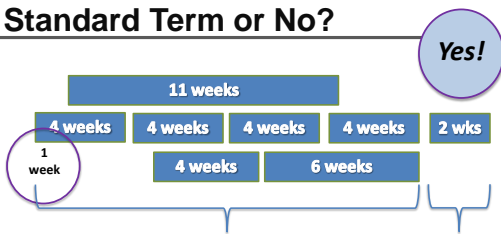
Sometimes in programs where clinical work is required (e.g., in medical fields or teaching), clinical periods do not coincide with a school's standard-term calendar. If the following conditions are met, a program need not be considered nonstandard-term or non-term:

- All students must participate in the clinical experience, and its completion is required for graduates to apply for licensure
- The institution has little or no control over the length or start and end dates of the clinical periods
- Credit hours must be associated with the term in which most of the training occurs, even if start and end dates are different or there is overlap with another term

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Standard Term or No?



- Modules can be combined to form a standard term of 16 or 17 weeks
 - This assumes there are few to no break times between modules
- The final two-week course can be considered an intersession, and can be attached to the term
 - This assumes that no courses overlap another term

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Standard-Term Calendar or No?



- The two- and three-week modules can be treated as intersessions, and can be attached to the adjacent terms
 - No courses overlap another term
- Since the first and second terms can be considered standard, the third term in the year may be treated as standard even though it is of nonstandard length

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Other Academic Calendars



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Nonstandard Term Considerations

Keeping nonstandard terms substantially equal and at least nine weeks in length (SE9W), allows for most of the flexibilities of standard terms.

- Consistency in disbursement rules across programs
- Flexibility with SAYs and BBAYs
- Single-term loans

Pell Grant Formula 3 must be used



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Non-term Considerations

- In non-term credit-hour and clock-hour programs, payment periods are based on the completion of hours and weeks
 - This has the greatest impact on administrative processes and timing of aid disbursements when students attend part-time or otherwise progress at an individual pace
 - However, when all or most students are full-time, disbursements can often remain scheduled in a way that mirrors a standard-term program
 - All students are completing hours and weeks at the same time



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Other Considerations

- *How will aid be provided in a way that ensures students have access to the resources they need?*
- *Instruction* defines how many weeks are included in a term
 - Flipped classes, independent study
- Changes being made to academic programs may require updating the E-App
 - Accreditor and/or state approval may also be needed



Other Considerations

- Effective July 1, 2016, even when a program must be offered in clock hours for state licensure purposes, it may be offered in credit hours for Title IV
 - May be subject to the clock-to-credit conversion

[IFAP > Cash Management Information Page](#)



Resources



References

FSA Handbook

- Volume 2: Program eligibility
- Volume 3: Calendars, payment and loan periods, modules
- Volume 4: Disbursement rules
- Volume 5: Withdrawals and R2T4

Program Integrity Q & A Website

- (Return of Title IV funds / Programs Offered in Modules)
<http://www2.ed.gov/policy/highered/reg/hearulemaking/2009/return.html#module>

- *Dear Colleague Letter GEN-11-14: July 20, 2011*





Thank you!

Follow-up questions? Contact:
AskFed@ed.gov





