

NEXT STEPS

CSU ID: 00000000

LOG IN TO RAMWEB

- Go to ramweb.colostate.edu and log in using your eID. Select Financial Aid to review your financial aid requirements.
- Grant billing and records access to parents or other trusted individuals by navigating to the records page of your RAMweb. Select Manage Student Record to edit your FAMweb preferences.

COMPLETE ANNUAL BUDGET WORKSHEET

- Fill out the annual budget worksheet on this page to estimate your costs and available resources.

ACCEPT LOANS (if needed)

- Subsidized/unsubsidized loans may be accepted on the awards page of RAMweb.
- To apply for a Parent PLUS Loan, one parent must complete a PLUS loan application on studentloans.gov. A Parent PLUS loan is contingent upon credit approval.

ANNUAL BUDGET WORKSHEET

FALL 2019 / SPRING 2020 (9 MONTHS)

Estimated Bill (see previous page)	\$
Estimated Books and Supplies	\$
Estimated Transportation (Save money! Leave your car at home).	\$
Miscellaneous (i.e. personal expenses, eating out, etc.)	\$
Total Costs	\$ <input type="text"/> (a)
Other Scholarships	\$
Savings	\$
Income from Work	\$
\$ _____ /hour x _____ hours/week x _____ weeks	
Loans	\$
Family Support & Other Resources	\$
Total Resources	\$ <input type="text"/> (b)
Your Total Estimated Costs	\$ (a)
Your Total Estimated Resources	- \$ (b)
Total Remaining Cost	= \$ <input type="text"/>

Prepayment Plan

If your total after accounting for all other resources is not \$0, you may wish to enroll in our prepayment plan to cover your remaining costs so that your bill is paid by the billing due date (billing timeline below).

You can pay your bill in elective monthly installments rather than in one lump sum due all at once. You can choose as many or as few months as you wish to make payments towards your plan, as long as it is paid by the billing due date.

Visit financialaid.colostate.edu/payment-plan to learn more and to estimate your monthly payments with the payment estimator tool.

BILLING TIMELINE

CHARGES ARE ASSESSED

Charges will be viewable on student accounts in July for the fall term and January for the spring term.

AID IS DISBURSED

Aid can pay to student accounts up to 10 days before classes start, given that all requirements are met.

BILLING DUE DATE

The student account billing due date is **September 10th** for the fall term and **February 10th** for the spring term.

QUESTIONS? CHAT WITH A FINANCIAL AID COUNSELOR!



Drop-in Advising:
Centennial Hall, 1000 East Dr.
M – F | 9a.m. – 5p.m.



Email:
Be sure to include CSUID!
FinancialAid@colostate.edu



Phone:
(970) 491-6321
M – F | 9a.m. – 5p.m.



OFFICE OF FINANCIAL AID
COLORADO STATE UNIVERSITY

BRIANA,

THIS IS YOUR OPPORTUNITY!

A COLLEGE EDUCATION IS A HUGE INVESTMENT.
AND HERE AT CSU, IT'S A WORTHWHILE ONE.

\$46,000

IS THE AVERAGE
STARTING
SALARY OF
CSU GRADUATES
OVER THE LAST 3 YEARS

84%

OF GRADUATES
SECURED
EMPLOYMENT
OR CONTINUING EDUCATION
WITHIN 6 MONTHS
OF GRADUATION



3 OUT OF 4
GRADUATES
ARE EMPLOYED IN
A FIELD RELATED
TO THEIR MAJOR

79%

OF GRADUATES
COMPLETE
THEIR DEGREE
IN 4 AND A HALF
YEARS OR LESS

LET'S TALK ABOUT HOW TO MAKE IT POSSIBLE!



2019-2020 FINANCIAL AID OFFER LETTER

CSU ID: 00000000

Estimated Cost of Attendance

Think of these estimates as a one-size-fits-all budget. Your **actual expenses will vary**, but this gives you an idea of what your education will cost this year.

Direct costs are charges you will see on your CSU bill. **Indirect expenses** are other expenses you should consider, but will not see on your bill.

Direct Costs			
Charges you'll be billed			
	Fall	Spring	Total
Resident Tuition and Fees ¹	\$6,076	\$6,076	\$12,152
On-Campus Housing and Meals ²	\$5,870	\$5,870	\$11,740
TOTAL DIRECT COST	\$11,946	\$11,946	\$23,892
Indirect Expenses			
Expenses you should budget for, but won't be billed			
	Fall	Spring	Total
Books and Supplies	\$600	\$600	\$1,200
Transportation	\$450	\$450	\$900
Other Educational Expenses	\$856	\$856	\$1,712
TOTAL INDIRECT EXPENSES	\$1,906	\$1,906	\$3,812
Estimated Cost of Attendance	\$13,852	\$13,852	\$27,704
Direct and Indirect Costs			

¹ Tuition and fees are calculated with the assumption of full time enrollment (12 credits for undergraduates). Your actual expenses may vary.
² For students residing in CSU housing, an average amount assuming a double occupancy room under an "Any 14" meal plan is used.

Awards

Your financial aid awards were created to help meet your estimated cost of attendance according to federal, state, and institutional regulations. All awards are based on available funds and full-time enrollment.

If funds become unavailable, your application contains incorrect data, or your financial situation changes, we may need to revise awards. Navigate to financialaid.colostate.edu/eligibility to learn more.

Grants and Scholarships			
Money that does not need to be repaid			
	Fall	Spring	Total
Federal Pell Grant	\$785	\$785	\$1,570
Colorado Student Grant	\$1,650	\$1,650	\$3,300
CSU Ram Grant	\$1,000	\$1,000	\$2,000
Federal SEOG Grant	\$500	\$500	\$1,000
Partnership Award	\$1,250	\$1,250	\$2,500
CSU Tuition Assistance Grant	\$4,115	\$4,115	\$8,230
TOTAL GRANTS AND SCHOLARSHIPS	\$9,300	\$9,300	\$18,600
NET COST	\$4,552	\$4,552	\$9,104
Estimated Cost of Attendance Minus Grants & Scholarships			
Student Loans			
Money paid back over time with interest			
	Fall	Spring	Total
Federal Direct Subsidized Loan	\$859	\$859	\$1,717
Federal Direct Unsubsidized Loan	\$1,892	\$1,892	\$3,783
TOTAL LOANS	\$2,750	\$2,750	\$5,500

Estimated Bill

We've done the math for you! The estimated bill you see below is your total direct costs minus your financial aid awards.

The estimate below does not include indirect expenses. Those vary from student to student and will not appear on your bill.

Estimated Bill			
What your bill might look like			
	Fall	Spring	Total
Direct Cost ³	\$11,946	\$11,946	\$23,892
Grants & Scholarships	-\$9,300	-\$9,300	-\$18,600
YOUR ESTIMATED BILL	\$2,646	\$2,646	\$5,292
Direct Cost Minus Grants & Scholarships			
Student Loans	-\$2,750	-\$2,750	-\$5,500
REMAINING ESTIMATED BILL⁴	\$0	\$0	\$0
After Student Loans Are Accepted			

³ Students living off campus will not be billed for housing and meals
⁴ If your accepted aid exceeds the charges on your bill, you may be eligible for a refund. Navigate to financialaid.colostate.edu/refunds to learn more.

Other Resources

The CSU Scholarship Application is open between October 1 and March 1 each year for all class levels. Learn more about scholarship opportunities on our website at financialaid.colostate.edu/scholarships

Student Employment is a great way to earn money for school expenses. Learn more at <http://ses.colostate.edu/types-of-work>

Your Other Financial Aid Awards			
See glossary for more information			
	Fall	Spring	Total
Work Study	\$1,500	\$1,500	\$3,000
Parent PLUS Loan	\$302	\$302	\$604

Glossary

Direct costs will be on your tuition bill from CSU. They include full time tuition (12+ credits), fees, housing & meals (unless living off campus).

Indirect expenses can vary by person. They include books and supplies you'll need for classes, transportation and spending money.

Estimated cost of attendance is the total of your direct and indirect cost estimates combined.

Grants and scholarships are free money. They do not need to be repaid.

Loans are money you borrow from the government and pay back with interest.

Net cost is equal to your direct and indirect costs minus your grants and scholarships.

Estimated bill is equal to your direct costs (what you see on your bill) minus grants and scholarships.

Unsubsidized loans accrue interest while you are in school. This loan does not go into repayment until six months after you graduate or drop below half time. For more information, please visit <https://col.st/04ifp>

Subsidized loans are need-based loans which do not accrue interest until six months after you graduate, drop below half time, or attempt more than 150 percent of the published length of your program. For more information, visit <https://col.st/CVbFM>

Parent PLUS loans are loans that parents of dependent undergraduate students can borrow (upon approved credit check) to help their students pay for college. Learn more at <https://col.st/uPsPS>

Student employment is an opportunity to work part time on campus and earn wages to help pay for living expenses. Wages earned are paid directly to you biweekly via direct deposit.

- Work study** is considered financial aid as 70 percent of your wages are paid from a limited pool of federal or state work study funds; the other 30 percent is paid by your employer.
- Student hourly** positions are not considered financial aid- 100 percent of the wages your earn are paid by your employer.

Financial Aid Advisory Committee
Meeting Notes
September 6, 2018

Committee Members in Attendance	Committee Members Absent	THECB Staff	Audience
Marilyn Abedrabbo Johnathan Cereceres Zelma De Leon Diane Todd Sprague Delisa Falks Karla Flores Jeannie Gage Bridget Jans Sandi Jones Robert Merino Chris Murr (Conference Call) Alan Pixley Charles Puls Cathy Sanchez Mike Scott Terry Sheneman Samantha Stalnaker Christine Stuart-Carruthers Kara Tappendorf Peggy Watts Brent Williford		Linda Battles Renee Jones Ken Martin Lesla Moller DeCha Reid Lourdes Sanchez Leah Smalley Shebah Spears	Rissa McGuire

Agenda Item B. Consideration of Approval of Minutes of the meeting held on June 8, 2018 Zelma De Leon, Chair	Formal Decision/Action Required Minutes unanimously approved.
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Agenda Item C. Update: Prior FAAC Business Charles Puls, Deputy Assistant Commissioner	Formal Decision/Action Required Agreement by the committee that the proposed FAFSA on the Web language achieved the goals of the prior discussion.
<p>FAFSA on the Web Language</p> <ul style="list-style-type: none"> The following language for the FAFSA and FAFSA on the Web instructions was developed based on feedback from the June FAAC meeting. It will be submitted for the 2020-2021 FAFSA cycle: "January 15, 2020. For priority consideration, submit application by date specified. Additional forms may be required. Private and two-year institutions may have different deadlines. Check with the college's financial aid administrator." FAAC members encouraged the agency to push more information about the change out to the school districts through professional associations such as TACAC or through the regional offices. <p>Nomination Process</p> <ul style="list-style-type: none"> Slate of nominees for new members (see handout) has been developed to present for approval at the September Committee on Affordability, Accountability, and Planning meeting and October Coordinating Board meeting. Chris Murr, Sandy Jones, Cathy Sanchez, and Jeannie Gage were recognized for their service as they complete their terms with this meeting. <p>Administrative Code</p> <ul style="list-style-type: none"> Efforts are underway to update the Administrative Code to allow for summer grants (TEG, TEOG, TEXAS grant) now that the allocation process has changed to allow institutions to request programming funding through August 1st. The majority of the rules surrounding summer grants will likely be the same as fall and spring The state's fiscal system does not allow for "carrying back" from one fiscal year to the prior fiscal year, so the impact of this on summer awards is being addressed. 	

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- SAP will be impacted by the treatment of summer as a header or trailer (e.g. as a header, SAP would need to be calculated before awarding summer grants, since summer starts the academic year; as a trailer, the same SAP as was used for fall and spring would be utilized, since it is the end of the academic year)
- Working to improve the consistency of our language in the rules (e.g. making sure terms like “semester,” “period of enrollment,” “academic year,” and “term” are consistent.

Agenda Item D. Presentation: Mission and Goals of the Division of College Readiness and Success (CRS)	Formal Decision/Action Required
Jerel Booker, Assistant Commissioner	None
<p>The Mission of CRS is to foster access, preparation, and completion of a higher education credential of value for all students.</p> <p>The Goal of CRS is to get students “To” and “Through” in the hopes of moving the needle toward <i>60X30TX</i> goals. The Division is directly aligned with three <i>60X30TX</i> goals: an educated population goal, completion goal, and student loan default goal.</p> <p>Access</p> <ul style="list-style-type: none"> • Coordinate a P-16 conference to connect with counselors • FAFSA campaign • Administer Apply Texas application and the Counselor Suite (K-12 tool) • Track direct-to-college rate • Recently took on financial literacy • Manage Advise TX (113 near-peer advisors in TX); <p>Preparation</p> <ul style="list-style-type: none"> • Emphasize the concepts of “college-ready” to middle school students, so they get themselves college-ready • Oversee Developmental Education programs to help under-prepared students become prepared. This includes implementing HB2223 (Co-Requisite –requires students to take college course and developmental education course at the same time) to help students prepare and complete their 1st year • Support parent 1-on-1 initiative – what it takes to be “college ready” and what parents should expect when their child prepares for college • Support and promote financial literacy – looking for ideas on improving efforts; pursuing additional funding from the legislature <p>Participation and Completion</p> <ul style="list-style-type: none"> • “Are you Ready” initiative comprised of 2 prongs: College-Ready students and Student-Ready colleges • Funding for student completion work; early alert systems; first-year seminars; bridge programs • Oversee Work-study Mentorship Program • Minority male initiatives (support initiatives for increased minority participation) <p>Outreach</p> <ul style="list-style-type: none"> • GenTX – effort to create a college going culture through a strong social media presence • P-16 Council for discussion between school districts and higher education officials to talk about concepts like dual-credit, on-ramps, pathways, and best practices to achieve goals of <i>60X30TX</i> <p>Institutions can assist CRS in promoting and supporting these initiatives and should email Jerel directly (jerel.booker@thehb.state.tx.us) with any ideas or comments. Particular feedback that would be helpful for CRS includes ideas on implementing financial literacy and thoughts on how CRS can implement the Work-Study Mentorship Program in a way that is effective on campuses.</p>	

Agenda Item E. Update External Relations	Formal Decision/Action Required
John Wyatt, Director	None
<p>Board Policy Recommendations</p> <ul style="list-style-type: none"> • The Texas WORKS Program, one of the Board’s major legislative recommendations, would replace the current requirement that a certain percentage of work-study positions be offered off-campus, with a more centralized approach to off-campus employment coordinated by the THECB. The THECB would have a central repository for off-campus internship opportunities, would work directly with employers to identify what those opportunities are, and would be able to set standards for determining the percentage of funding from the state and from the employers and 	

Financial Aid Advisory Committee
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<p>(b) making sure that marketable skills are embedded in that internship. This program was proposed in the last legislative session through SB1467/HB3179 bills during the last session.</p> <ul style="list-style-type: none"> • A challenge that arose in the last session related to the question of funding availability for undocumented students. The legislature ultimately did not choose to act on this issue through any legislative changes. • TEXAS Grant Program: Another recommendation from the last session that will be proposed again is to limit lifetime eligibility to 135 hours or 15 hours beyond degree requirements. The underlying idea is to motivate students to graduate in a timely manner and to free up funds for other students who are eligible for TEXAS Grant. • TEOG: A third recommendation from the last session is allowing students enrolled in baccalaureate programs at two-year institutions be eligible for TEOG awards, up to 135 hours. Although the Legislature allowed for expansion of BA programs at these institutions, there really is no state aid for these students. <p>Legislative Appropriations Request (LAR)</p> <ul style="list-style-type: none"> • In our base appropriation, it is recommended that any excess funding that is not needed for the B-On-Time loan program for students at private institutions be moved to the TEG program. • An Exceptional Item Request has been made for the TEXAS Grant program, recommending an additional \$107.3 million for the biennium, allowing the state to serve the same percentage of initial year students, while also increasing the TEXAS Grant Target Award by 2.5 percent each year. <p>Recommendations from the FAAC Subcommittee on legislative recommendations</p> <ul style="list-style-type: none"> • The recommendations provided by the subcommittee will be a part of conversations with members of the Legislature as bills move through the process. • The hurdle with all financial aid recommendations is moving ideas forward given the legislative challenges in the last session that arose around the topic of undocumented students. • The TEXAS Grant drug offense question would require a statutory change, and it is a good example of something that can be part of the conversation with legislators as bills move through the process. The conversation would be about helping legislators understand the benefits of aligning state requirements with federal requirements. • The recommendation to allow Pell as a matching fund for TEOG is another place where External relations can look for opportunities to educate legislators on the recommendation. 	
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Agenda Item F: Update: SB887 Student Loan Letter	Formal Decision/Action Required
Ginger Gossman, Sr. Director	None
<p>Recent Events</p> <ul style="list-style-type: none"> • June 4th webinar focused on the logistics of the student debt letter • August 28th webinar focused how to craft language that would resonate with the students • The links to both the June 4th and August 28th webinars will be distributed • No future webinars planned at this point, but others can be planned if additional needs are identified <p>SB887 goes into effect this year, though the timing of the letter is not dictated in statute or in rule to allow institutions to determine what timing would be most powerful for its students.</p> <p>THECB crafted a template that encompasses everything that is in statute and rule, but it is designed as a guide to help institutions understand everything that must be covered. The template is not written to engage students, and institutions can use the template to create their own letters that achieve that.</p> <p>As the federal government considers implementing requirements similar to those in SB887, the agency is open to proposing changes to SB887 to reduce duplicative efforts that might be created. How private loans can best be captured in a central location for student access is also a key question to be considered in both the federal and state requirements.</p>	

Agenda Item G: Presentations: Annual TEXAS Grant Report and Financial Aid Report	Formal Decision/Action Required
Charles Puls, Deputy Assistant Commissioner Lesa Moller, Sr. Director	The "national" slide showing institutional grant aid will be researched by agency staff to determine if it includes tuition remission, as the amounts are much higher than what is shown for Texas.

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Chad presented an overview of the TEXAS Grant Report for FY 2017, highlighting the four legislatively mandated items in the report: allocations, number of awards (disaggregated by race, ethnicity, and expected family contribution), basic requirements vs priority model requirements, and student performance in terms of persistence, retention and graduation rates.

Lesa presented an overview of the annual Report on Student Financial Aid in Texas Higher Education for FY 2017, which will be presented at the September CAAPs meeting. All stakeholders (students, institutions, and the State) need to work together to overcome the shortfalls that exist after the expected family contribution and financial aid have been subtracted from education costs. While Texas has a robust financial aid program, increased investment in financial aid is needed because approximately 60% of students in the Pre-K through grade 12 pipeline are from low-income families.

Agenda Item H: Update: Data Collection Sub Committee Samantha Stalnaker, sub-committee Chair	Formal Decision/Action Required None
<p>The sub-committee reviewed the FAD FY17-18 Cycle 3 Manual at their last meeting, which was then published on August 30 with the collection cycle beginning on August 31.</p> <p>Reporting cycles for FAD FY18-19 will have new dates as follows: Cycle 1, February 11 – April 15, 2019; Cycle 2, June 10 – August 19, 2019; Cycle 3, September 30 – December 16, 2019.</p> <ul style="list-style-type: none"> • The sub-committee talked about the confusion and difficulties with opening Cycle 1 in December. Some institutions were not sure if they should be reporting fall data or spring data. Moving this cycle back should ease this confusion as well as allow reporting Cycle 2 to end after spring semester, hopefully after satisfactory academic progress has been determined. <p>The auto grant payment project discussions have begun and the sub-committee will continue to advise on this project.</p> <p>The award histories for TEXAS Grant, TEOG and TEG are being redesigned due to using the FAD instead of the End of Year reports and are scheduled to be up by December 1.</p>	

Agenda Item I: Discussion: Texas Application for Student Financial Aid sub-committee Charles Puls, Deputy Assistant Commissioner	Formal Decision/Action Required A motion to establish a TASFA sub-committee passed unanimously. Robert Merino was nominated and approved as Chair of the sub-committee
<p>Critical Discussion Points</p> <p>Dr. Puls proposed creation of a standing TASFA sub-committee to review the TASFA on a regular basis and ensure that it continues to serve the needs of the students. Institutions should submit names of others wishing to serve on the sub-committee to the Chair.</p>	

Agenda Item J. Discussion: Texas Grant Pathways of Eligibility Charles Puls, Deputy Assistant Commissioner	Formal Decision/Action Required None
<p>Critical Discussion Points</p> <ul style="list-style-type: none"> • The final handout on funding levels estimates funding levels and needs for all programs, in particular the TEXAS Grant • The coming Legislative session will be used to build on the TEXAS Grant pathways • The TEXAS Grant pathways are: <ul style="list-style-type: none"> ○ Enrolling within sixteen months after graduation from a high school ○ Enrolling within twelve months of completing an associate degree ○ Transferring after having received a TEOG and completing an associate’s degree or transferring after having received a TEOG an completing 24 credits with at least a 2.5 GPA ○ Military pathway has two components: <ul style="list-style-type: none"> ➢ Enlisted in the military within 12 months of graduating ➢ Enrolling within 12 months after being honorably discharged from military service • Estimated funding for the current biennium was about 92% of eligible students and after adding in TEOG and associate students (to the eligibility pathways for which we have information) we were able to identify, that funding dropped to 70% of eligible students • High school pathway has decreased over the years from 77.6% to 68.6% and there has been some growth in the associate degree students • TEXAS Grant pathway stats: 	

Financial Aid Advisory Committee
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- About 95% of recipients come through the high school pathway
 - About 4% of recipients come through Associate’s Degree pathway
- About 1% of recipients come through the TEOG pathway

Agenda Item K. Update: Office of Student Financial Aid Programs Charles Puls, Deputy Assistant Commissioner	Formal Decision/Action Required None
<p>The TASSP nomination process closed August 31.</p> <ul style="list-style-type: none"> • Elected officials may name an alternate if their nominee does not complete the application process. SFAP staff will identify which of the 85 nominees did not complete the process by October 15 and will reach out to legislators for alternate nominees. • Beginning this year, if a current TASSP recipient fails to meet the requirements of the program (not meeting SAP, no longer enrolled in ROTC, etc.), the student loses their remaining eligibility and are not allowed back into the program. The elected official who originally nominated the student has the option to nominate a replacement nominee for the next fiscal year. The replacement student is only eligible for the portion of the award that had not yet been utilized. • This year had the lowest number of TASSP nominations (85) since the beginning of the program. There are usually between 110-115 nominations. <p>The agency received an \$850,000 State Loan Repayment Program (SLRP) grant from the federal government with a recommendation for three renewal years. This program will be used in tandem with our loan repayment program for mental health professionals.</p> <p>Financial Aid Services posted program guidelines in August along with the annual memo to start the new fiscal year. The Student Financial Aid Programs link can now be found in the Institutional Resources and Program drop down menu on the THECB main website.</p> <p>SFAP has been working to establish and track more detailed customer response metrics both in terms of responses to institutions, as well as responses to borrowers. Looking at these metrics (e.g. responding to the online CRAFT system, processing borrower forms, answering phone calls, etc.) has already helped re-deploy some staffing resources.</p>	

Agenda Item L. Transition of Leadership Zelma De Leon, Chair	Formal Decision/Action Required None
Zelma De Leon’s term as Chair ends with this meeting. Diane Todd Sprague assumes the Chair role.	

Agenda Item M. Adjournment Diane Todd Sprague, Chair	Formal Decision/Action Required
Next FAAC Meeting set for December 06, 2018. Adjournment at 12:28pm	

Financial Aid Advisory Committee
Meeting Notes
June 7, 2018

Committee Members in Attendance	Committee Members Absent	THECB Staff
Zelma De Leon Delisa Falks Karla Flores Jeannie Gage Bridget Jans Sandi Jones Robert Merino Chris Murr Alan Pixley Cathy Sanchez (teleconf.) Terry Sheneman Samantha Stalnaker Christine Stuart-Carruthers Brent Williford Jonathan Cereceres Marilyn Abedrabbo – Guest Lois Hollis-Guest	Diane Todd Sprague Kara Tappendorf Mike Scott Peggy Watts	Linda Battles Renee Jones Ken Martin Lesa Moller Charles Puls DeCha Reid Lourdes Sanchez Leah Smalley Shebah Spears

Agenda Item	Critical Discussion Points	Formal Decision/Action Required
B. Consideration of Approval of Minutes of the meeting held on March 8, 2018 Zelma De Leon, Chair	Motion to approve meeting minutes from 3-8-2018	Minutes unanimously approved.
C. Update: Prior FAAC Business Charles Puls, Deputy Assistant Commissioner	Update: <ul style="list-style-type: none"> • The TEXAS Grant, TEOG, and TEG Negotiated Rule-Making (NRM) Committees all reached consensus on language that will provide institutions more flexibility in the use of their funding. Language posted in the Texas Register for a 30-day comment period ending June 17: <ul style="list-style-type: none"> ○ Eliminates reallocations ○ Allows institutions until August 1 to manage their allocation ○ Provide allocation increases much earlier in the academic year (October vs. March) so that institutions can address student needs more effectively. ○ Equitably distribute excess funding across all institutions early in the academic year, rather than focusing on those institutions making requests late in the year ○ Provides a preliminary step toward institutions being able to provide summer grants ○ TEG and TEOG also chose to move to receiving allocations for both years of the biennium at the start of the biennium ○ The NRM rules will be presented to the Board’s Committee on Affordability, Accountability, and Planning at its June meeting. 	None

Financial Aid Advisory Committee
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June 7, 2018

	<ul style="list-style-type: none"> • Update on the Student Loan Letter: <ul style="list-style-type: none"> ○ Staff at Indiana University shared their experiences with a comparable student loan letter, which informed a THECB webinar conducted earlier this week. ○ This first webinar focused on technical questions about the loan letter requirement. ○ Ginger and her staff are planning a second webinar that is going to address how to reach students effectively (language in the letter, etc.). • The THECB received a new member nomination from the two-year institution sector, Marilyn Abedrabbo, of Collin Community College, who will be recommended for approval by the Board at the July meeting. 	
<p>D. Presentation: Data Highlight on Student Debt</p> <p>Jenna Cullinane-Hege, Deputy Assistant Commissioner</p>	<p>Overview: Ms. Cullinane-Hege discussed the student debt goal (fourth goal of 60x30TX Higher Education Plan), and provided the results of the analysis completed on student debt for institutions of higher education in Texas. Handouts were provided. Statewide goal is to limit student debt so that it does not exceed 60% by 2030. Current statewide median is 58.9%</p> <p>Discussion:</p> <ul style="list-style-type: none"> • Measurements used to perform analysis over a 10-year span (2007-2017): <ul style="list-style-type: none"> ○ Percentage of completers vs. non-completers ○ Amount of debt incurred • Loans tracked during analysis <ul style="list-style-type: none"> ○ Federal ○ State ○ Private • Measurements not used during analysis: <ul style="list-style-type: none"> ○ Completers seeking 2nd degree ○ Hours earned beyond completion ○ Developmental courses • Debt as a percentage of wage varies by: <ul style="list-style-type: none"> ○ Age group <ul style="list-style-type: none"> ✓ Younger students tend to have lower percentages in the number of loans taken out and lower loan amounts at public universities and 2-year institutions ○ Ethnicity <ul style="list-style-type: none"> ✓ African Americans contain the highest proportion of students and hold a higher loan debt ○ Gender <ul style="list-style-type: none"> ✓ Higher number of females are taking out loans ✓ Amount of loans are consistent with males and females ○ Completers vs. Non-completers <ul style="list-style-type: none"> ✓ Non-completers carry less debt and have a lower average loan amount ○ Degrees <ul style="list-style-type: none"> ✓ Professional and doctoral degrees have the highest level of debt ✓ Bachelor's degree holders have twice as much debt incurred as Associate and Certificate degrees ○ Discipline 	<p>None</p>

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	<ul style="list-style-type: none"> ✓ Completers of associate degrees typically have a lower debt to first year wage • Debt to first year wage for the strategic plan includes borrowers with the following details:: <ul style="list-style-type: none"> ○ Completers ○ Must have debt ○ Must have wages 	
<p>E. Update: External Relations</p> <p>Linda Battles, Deputy Commissioner, for John Wyatt</p>	<p>Update: The Board adopted its priority recommendations for the 86th legislative session in April. Major legislative recommendations impacting financial aid include:</p> <ul style="list-style-type: none"> • TX WORKS Program – modifies and centralizes the Texas Work Study program. <ul style="list-style-type: none"> ○ Mirrors recommendation from 85th Legislature; plans underway to “tweak” this recommendation during the interim to address concerns raised in last session ○ Discussions underway to consider how to connect TX WORKS to the tri-agency’s (THECB, TWC, and TEA) challenge internship program, which encourages private employers to offer paid internships and provides centralized online location for students to view available jobs. • TEXAS Grant – reduces the number of semester credit hours of eligibility from 150 to 130. <ul style="list-style-type: none"> ○ Aligns with 60X30TX strategy to encourage students to graduate more timely ○ Will provide significant savings to serve more students. • TEOG - expands TEOG number of hours of eligibility for students enrolled in community college baccalaureate degree programs. • Compliance monitoring – requires institutions to report the receipt of credible allegations of fraud, waste and abuse to the THECB (in addition to reporting to the State Auditor’s Office) <p>The THECB is in the process of developing its FY 20-21 Legislative Appropriations Request, including the requested 10% budget reduction scenario and an Exceptional Items Request (funding for programs above level funding).</p>	<p>None</p>

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<p>F. Update: Data Collection Sub-Committee</p> <p>Samantha Stalnaker, Sub-committee Chair</p>	<p>Update:</p> <ul style="list-style-type: none"> • The subcommittee reviewed FAD FY17-18 Cycle 2 and were able to produce an updated manual by April 18th. (Data collection began on May 1.) • As of 6/7/18, 81 out of 144 institutions submitted a file for Cycle 2. (Everything must be wrapped up by August 1.) <p>Discussion:</p> <ul style="list-style-type: none"> • DeCha Reid commented that Cycle 2 involves reconciliation for state programs. It is necessary for all schools to complete validation by August 1st for institutions to begin Cycle 3, which has a December 12, 2018 deadline. • Question: Due to the upcoming changes with allocations, will reconciliation be done in the 3rd cycle instead of the 2nd cycle in the future? <ul style="list-style-type: none"> ○ Several factors, such as the new allocation process, reconciling exemptions and waivers using IFRS data, and processing requests for funding, will be reviewed to determine the most effective timing needed for reconciliation in the future. 	<p>None</p>
<p>G. Update: Administrative Code Revisions</p> <p>Charles Puls, Deputy Assistant Commissioner</p>	<p>Overview:</p> <p>In reviewing the proration rules (TX Grant, TEOG, TEG), the following questions were raised:</p> <ul style="list-style-type: none"> • Are they effective or in need of simplification? • Is there a desire or an opportunity for consistency across the 3 programs? • Would having the same proration rates across programs provide greater flexibility for institutions? • Should there be a ¾ time proration rate for 2-year institutions? • Have we made the proration schedules too complicated for institutions? <p>Discussion:</p> <ul style="list-style-type: none"> • The members agreed that better alignment between programs makes sense overall, but no changes to the proration rates themselves are needed. • There was consensus that the existing language should be modified for greater clarity and understanding. • To the extent possible, the THECB should align state financial aid programs' rules with those of the federal programs. • The THECB will review its TEOG guidelines to ensure that they are consistent with program rules. 	<p>Proposed changes will be brought to a future meeting for discussion.</p>

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<p>H. Discussion: State deadline language on FAFSA</p> <p>Charles Puls, Deputy Assistant Commissioner</p>	<p>Update:</p> <ul style="list-style-type: none"> • Each year the Department of Education requests updates from each state as to what the language should be on the FAFSA regarding the deadline. • The language must be submitted by March. <p>Discussion:</p> <ul style="list-style-type: none"> • Currently Texas has one of the lengthier descriptions. • The Department provides standard lines of language that can be used. • Texas’ description begins with “As soon as possible after October 1, 2018”. After discussion within the committee it was determined that this line is not necessary anymore since it has been a couple of years removed from the change in dates for applying for financial aid. • Many students interpret January 15 as a deadline date to apply for financial aid and not as a priority consideration date. • It was suggested that the priority consideration idea is getting lost in the wording and the narrative should be shortened as much as possible. • Suggested wording: January 15, 2019. For priority consideration submit application by date specified. Texas private colleges – Check with your financial aid administrator. • Should we add “Awards are made until funds are depleted?” 	<p>Suggested wording will be brought to September FAAC meeting for final decision.</p>
<p>I. Discussion: Annual Financial Aid Report Appendix E</p> <p>Charles Puls, Deputy Assistant Commissioner</p>	<p>Overview:</p> <p>Chad brought to the Committee’s attention the part of Appendix E (students who demonstrated need and received aid) that shows the distribution of students by income ranges. He noted that the THECB has been using the same income ranges for many years and wanted the committee’s feedback on whether these ranges should be updated to reflect current needs.</p> <p>Discussion:</p> <ul style="list-style-type: none"> • Should the income ranges be changed from \$5,000 increments to \$10,000 increments? Should the upper range be changed from \$100,000 and above to \$150,000 and above? <ul style="list-style-type: none"> ○ One member suggested keeping the \$5,000 increments but increasing the upper range to \$150,000 or \$200,000 and above. ○ Another member believed that Apply Texas uses \$10,000 increments in its ranges, up to \$200,000 and above. 	<p>Chad will check other reports (IPEDS, FISAP, Apply Texas) to determine if there is consistency there, which the annual report could match.</p>
<p>J. Update: FAAC Nomination Process</p> <p>Charles Puls, Deputy Assistant Commissioner</p>	<p>Update:</p> <p>Nomination process closed on May 25, 2018. Current nominations are under review. The following representations are being analyzed:</p> <ul style="list-style-type: none"> ○ Geographic ○ Sector ○ System <p>Presentation of nominees for approval will take place at the September 2018 Board Committee Meeting on Accountability, Affordability, and Planning.</p>	<p>Slate of nominees will be presented at September FAAC</p>

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<p>K. Update: Office of Student Financial Aid Programs</p> <p>Charles Puls, Deputy Assistant Commissioner</p>	<p>Overview:</p> <ul style="list-style-type: none"> • At the January meeting Chad stated that a top priority was to hire 14 new staff members by July. <ul style="list-style-type: none"> ○ 13 of those positions have been filled and staff and are in the process of reviewing applications to fill four more vacancies that have occurred since January. • Borrower Services: <ul style="list-style-type: none"> ○ The TASSP nomination process opened on April 15th for legislators to submit their nominations through July 31st. ○ The CAL interest rate was reduced from 6.6 percent to 5.3 percent on May 14. Chad acknowledged that we didn't communicate this to institutions as effectively as we could have. In the effort to help borrowers take advantage of the new rate, the communication was too confusing for institutions. We will improve on this in the future. ○ New features in the new Integrated Voice Response System are being implemented, such as automated dialing for due diligence activities, which makes more staff available to take incoming calls. ○ Later this month a new PIN option will be available to borrowers to verify their identity, which will be helpful if they are calling from a phone number that the system doesn't recognize. • Financial Aid Services: <ul style="list-style-type: none"> ○ There have been several recent communications about program allocations. ○ Institutions can now access the SFAP web pages by going to the "Agency Resources" heading on the home page of the THECB web site. • Legislative Reporting: <ul style="list-style-type: none"> ○ The TEXAS Grant Report will be presented to the CAPPS Committee in June for approval at the Board meeting in July. ○ The annual financial aid report will go to the CAPPS meeting in September and the Board meeting in October. ○ Chad will present information from both reports at the September FAAC meeting. 	<p>None</p>
<p>L. Adjournment</p> <p>Zelma De Leon, Chair</p>	<ul style="list-style-type: none"> • Next FAAC Meeting set for September 6, 2018 • Meeting adjourned at 11:47 a.m. 	

Idea for Data Collection Sub-Committee's Input

Summary

- The initial idea for submitting three versions of the FAD was started in 2016. Since that time, reallocations have been eliminated for the grant programs, efforts to introduce summer grant flexibility have begun, and a project has been undertaken to bring greater automation and efficiency to the disbursement of funding to institutions. These changes alter the state financial aid landscape and may provide an opportunity for further improvement.
- The following suggestion would change the scope of the auto-grant payment project, so an analysis of the deliverable timeline would be necessary if it's deemed worthy of consideration.
- Specifically, the suggestion is to utilize the grant payment rosters and other data already submitted to THECB in order to allow institutions greater flexibility in summer awarding and to reduce the number of FAD submissions.

Disbursement Roster Format

The Disbursement Roster would include a limited set of data elements to allow for automated processing of payments to institutions.

- Four elements for each entry to allow for matching to the Award History files and FAD:
 - Student ID
 - DOB
 - First Name
 - Last Name
- Three elements related to the student's specific award:
 - Amount of semester award
 - Semester indicator
 - FAD Year (e.g. the FAD year the agency should expect to see the grant reported)
- The file's header record would indicate the Appropriation Year of the allocation the institution wishes to use to pay the student records. (For example, in the summer, an institution can indicate to use the current Appropriation Year to pay students if the institution still had funds available. Or, the institution could use the upcoming Appropriation Year, with the understanding that the agency cannot disburse funds to the institution until after September 1.)
- A determination would be needed on how to handle award amounts that change, and how that would impact the uses suggested below. The roster could be cumulative (e.g. if the award for a student who was previously included was changed, the roster would list the new award amount) or iterative (e.g. if the award for a student who was previously included was changed, the roster would list the positive or negative change).

Disbursement Roster Uses

The Disbursement Roster could be used for several purposes.

- Populate the Award History files with uncertified data (see Award History File Restructuring section below)
- Calculate the payment amount to be sent to the institution

- The Disbursement Roster would be compared to payments already made to the institution for the identified appropriation year to determine the amount of payment to be sent to the institution.
- Create reconciliation rosters
 - Total disbursements by appropriation year, for the agency's reconciliation with the fiscal year records
 - Total disbursements by FAD year, for the institution's reconciliation with the FAD
- Allow for the calculation of the running totals of grant recipients and dollars awarded throughout the year, which are used for reporting purposes.

Award History File Restructuring

The sources of information for the Award History file could change. Fields populated by the Disbursement Rosters would be updated to certified data upon submission of the FAD.

- **ID**: From Disbursement Roster (for matching purposes if student is already in the file, otherwise for initial creation of the ID field)
- **DOB**: From Disbursement Roster (for matching purposes or initial creation)
- **First Name**: From Disbursement Roster (for matching purposes or initial creation)
- **Last Name**: From Disbursement Roster (for matching purposes or initial creation)
- **Hours Year-To-Date (Hrs YTD) {Not TEG}**: The Hours Year-To-Date field needs review in light of the rule changes that occurred in 2015 regarding the maximum credit hour limits
- **Initial Year Awarded (IY)**: From Disbursement Roster if student is not already in the history file
- **Initial Semester (IYS)**: From Disbursement Roster if student is not already in the history file
- **Last Year Reported (L_Year)**: From Disbursement Roster
- **LAST FICE Code Reported (L_FICE)**: From Disbursement Roster
- **Last SAP Reported (L_MetSAP)**: If necessary, generate from separate institutional SAP report
- **Last Reported GPA (L_GPA)**: From CBM00S for public institutions; HRI's and independent institutions would need to report this field in the separate institutional SAP report
- **Last Hours Completed Reported (L_HrsCompleted) {Not TEOG}**: From CBM00S for public institutions; HRI's and independent institutions would need to report this field in the separate institutional SAP report
- **Last Completion Rate Reported (L_ComRate) {Not TEXAS Grant}**: From CBM00S and CBM01E for public institutions; HRI's and independent institutions would need to report this field in the separate institutional SAP report
- **Last Degree Reported (L_Degree) {TEG Only}**: From CBM009

The five underlined fields have the potential to be streamlined or eliminated through the utilization of other institutional reports and institutional determination of SAP by the awarding institution.

FAD Submission Restructuring

The FAD could revert back to one submission per year.

- The first FAD submission was envisioned to provide the necessary data to allow for:
 - Reallocations: These have been eliminated for the grant programs
 - Earlier entry into the Award History file: The award details could be entered through the Disbursement Rosters
 - The first submission could potentially be eliminated
- The second FAD submission was envisioned to provide the necessary data to allow for:
 - Reconciliation: The introduction of summer awards has complicated this, since institutions may not be done awarding summer by the time they need to complete the second submission. Thus, reconciliation during the second submission may not be possible. Also, with the creation of the Disbursement Rosters, there may be less concern regarding the need for reconciliation during the 2nd submission.
 - Entry into the Award History file: The award details could be entered through the Disbursement Rosters. There is potential for entering the GPA, Hours completed, and Completion Rate via the CBM00S and CBM0E1 for public institutions. There is potential for entering the Last Degree Reported through the CBM009.
 - The second submission could potentially be eliminated, if, instead, institutions calculated SAP themselves or filed a separate institutional SAP report (described below).
- The third FADS submission would continue to serve the following purposes, with an earlier deadline (November 1).
 - Allocation calculations
 - Spending projections for the legislature
 - Legislative reporting requirements
 - Reconciliation of the Disbursement Rosters
 - Update the Award History files with Certified data

The FAD could also be analyzed to determine whether further simplification of the data elements are possible.

Separate Institutional SAP Report

If a separate institutional SAP report is needed, it is envisioned as a streamlined report with a June submission and a September update with limited data elements.

- Four elements for matching purposes:
 - Student ID
 - DOB
 - First Name
 - Last Name
- One element for all institutions:
 - Y/N indication of whether student was meeting SAP
- Three additional elements for HRI's and Independent institutions:
 - GPA
 - Hours Completed
 - Completion Rate

CHAPTER 22 STUDENT FINANCIAL AID PROGRAMS
SUBCHAPTER G TEXAS COLLEGE WORK-STUDY PROGRAM

Rules

§22.127 Authority and Purpose
 §22.128 Definitions
 §22.129 Institutions
 §22.130 Eligible Student Employees
 §22.131 Eligible Employers
 §22.132 Award Amounts and Uses
 §22.133 Allocation and Disbursement of Funds
 §22.134 Authority to Transfer Funds [~~Dissemination of Information and Rules~~]
 [~~§22.135 Authority to Transfer Funds~~]
 [~~§22.136 Biennial Report and Data Collection~~]

§22.127 Authority and Purpose

(a) Authority. Authority for this subchapter is provided in the Texas Education Code, Chapter 56, Subchapter E. These rules establish procedures to administer the subchapter as prescribed in the Texas Education Code, §§56.071 - 56.078.

(b) Purpose. The purpose of the Texas College Work-Study Program is to provide eligible students with jobs, funded in part by the State of Texas, to enable those students to attend eligible institutions of higher education in Texas and, through a mentorship program, provide assistance to students on academic probation.

§22.128 Definitions

In addition to the words and terms defined in Texas Administrative Code, §22.1 the [The] following words and terms, when used in this subchapter, shall have the following meanings, unless the context clearly indicates otherwise:

~~[(1) Board--The Texas Higher Education Coordinating Board.]~~

~~[(2) Commissioner--The Commissioner of Higher Education, the Chief Executive Officer of the Board.]~~

~~[(3) Cost of attendance--A Board-approved estimate of the expenses incurred by a typical financial aid student in attending a particular college or university. It includes direct educational costs (tuition, fees, books, and supplies) as well as indirect costs (room and board, transportation, and personal expenses).]~~

(1) ~~[(4)]~~ Encumbered funds--Program funds that have been offered to a specific student, which offer the student has accepted, and which may or may not have been disbursed to the student.

~~[(5) Expected family contribution—The amount of discretionary income that should be available to a student from his or her resources and that of his or her family, as determined following the federal methodology.]~~

~~[(6) Financial need—The cost of attendance at a particular public or private institution of higher education less the expected family contribution. The cost of attendance and family contribution are to be determined in accordance with Board guidelines. Federal and state veterans' educational and special combat pay benefits are not to be considered in determining a student's financial need.]~~

~~[(7) General academic teaching institution—The University of Texas at Austin; The university of Texas at El Paso; The University of Texas of the Permian Basin; The University of Texas at Dallas; The University of Texas at San Antonio; Texas A&M University, Main University; The University of Texas at Arlington; Tarleton State University; Prairie View A&M University; Texas Maritime Academy (now Texas A&M University of Galveston); Texas Tech University; University of North Texas; Lamar University; Lamar State College—Orange; Lamar State College—Port Arthur; Texas A&M University—Kingsville; Texas A&M University—Corpus Christi; Texas Woman's University; Texas Southern University; Midwestern State University; University of Houston; University of Texas—Pan American; the University of Texas at Brownsville; Texas A&M University—Commerce; Sam Houston State University; Texas State University—San Marcos; West Texas A&M University; Stephen F. Austin State University; Sul Ross State University; Angelo State University; The University of Texas at Tyler; and any other college, university, or institution so classified as provided in this chapter or created and so classified, expressly or impliedly, by law.]~~

~~[(8) Half time student—For undergraduates, a person who is enrolled or is expected to be enrolled for the equivalent of six or more semester credit hours. For graduate students, a person who is enrolled or is expected to be enrolled for the equivalent of 4.5 or more semester credit hours.]~~

(2) ~~[(9)]~~ Institution of Higher Education or Institution--Any public technical institute, public junior college, public senior college or university, medical or dental unit or other agency of higher education as defined in Texas Education Code, §61.003(8).

(3) ~~[(10)]~~ Program--The Texas College Work-Study Program.

~~[(11) Program Officer—The individual named by each participating institution's chief executive officer to serve as agent for the Board. The Program Officer has primary responsibility for all ministerial acts required by the program, including maintenance of all records and preparation and submission of reports reflecting program transactions. Unless otherwise indicated by the administration, the director of student financial aid shall serve as Program Officer.]~~

~~[(12) Resident of Texas--A resident of the State of Texas as determined in accordance with Chapter 21, Subchapter B of this title (relating to Determination of Resident Status). Nonresident students who are eligible to pay resident tuition rates are not residents of Texas.]~~

§22.129 Institutions

(a) Eligibility.

(1) Any public, private, or independent institution of higher education as defined by Texas Education Code, §61.003, except a theological or religious seminary, is eligible to participate in the Program ~~[general work-study program. Only general academic teaching institutions may participate in the mentorship program.]~~

(2) No institution may, on the grounds of race, color, national origin, gender, religion, age, or disability exclude an individual from participation in, or deny the benefits of the program described in this subchapter.

(3) Each participating institution must follow the Civil Rights Act of 1964, Title VI (Public Law 88-353) in avoiding discrimination in admissions or employment.

(b) Approval.

(1) Agreement. Each approved institution must enter into an agreement with the Board, the terms of which shall be prescribed by the Commissioner.

(2) Approval Deadline. An institution must be approved by April 1 in order for qualified students enrolled in that institution to be eligible to receive grants in the following fiscal year.

(c) Responsibilities.

(1) Probation Notice. If the institution is placed on public probation by its accrediting agency, it must immediately advise the Board and work-study award recipients of this condition and maintain evidence in each student's file to demonstrate that the student was so informed.

(2) Disbursements to Students.

(A) Documentation. The institution must maintain records to prove the receipt of program funds by the student or the crediting of such funds to the student's school account.

(B) Procedures in Case of Illegal Disbursements. If the Commissioner has reason for concern that an institution has disbursed funds for unauthorized purposes, the Board will notify the Program Officer and financial aid director and offer an opportunity for a hearing pursuant to the procedures outlined in Chapter 1 of this title (relating to Agency Administration). Thereafter, if the Board determines that funds have been improperly disbursed, the institution shall become primarily responsible for restoring the funds to the Board. No further disbursements of work-study funds shall be permitted to students at that institution until the funds have been repaid.

(3) Reporting Requirements/Deadlines. All institutions must meet Board reporting requirements in accordance with stated deadlines. ~~[a timely fashion. Such reporting requirements shall include reports specific to allocation and reallocation of grant funds~~

(including the Financial Aid Database Report) as well as progress and year-end reports of program activities.]

(4) Program Reviews. If selected for such by the Board, participating institutions must submit to program reviews of activities related to the [Texas College Work Study] Program.

(5) Publicizing Work-Study Employment Opportunities. Institutions participating in the [Texas College Work Study] Program must establish and maintain an online list of work-study employment opportunities available on campus, sorted by department as appropriate, and ensure that the list is easily accessible to the public and prominently displayed on the institution's website.

§22.130 Eligible Student Employees

(a) To be eligible for employment in the Program [general work study program] a person shall:

- (1) be a Texas resident as defined by Board rules;
- (2) be enrolled for at least the number of hours required of a half-time student, and be seeking a degree or certification in an eligible institution;
- (3) establish financial need in accordance with Board procedures; and
- (4) have a statement on file with the institution of higher education indicating the student is registered with the Selective Service System as required by federal law or is exempt from Selective Service registration under federal law.

(b) A person is not eligible to participate in the Program [work study program] if the person:

- (1) concurrently receives an athletic scholarship;
- (2) is enrolled in a seminary or other program leading to ordination or licensure to preach for a religious sect or to be a member of a religious order.

§22.131 Eligible Employers

(a) An eligible institution may enter into agreements with outside employers to participate in the Program [general work study program]. To be eligible to participate, an employer must:

- (1) provide part-time employment to an eligible student in nonpartisan and nonsectarian activities;
- (2) provide, insofar as is practicable, employment to an eligible student that is related to the student's academic interests;
- (3) use Program [Texas college work study program] positions only to supplement and not to supplant positions normally filled by persons not eligible to participate in the work-study program; and
- (4) unless eligible for a waiver of matching funds under subsection (b) of this section, provide not less than 25 percent of an employed student's wages and 100

percent of other employee benefits for the employed student from sources other than federal college work-study program funds, if the employer is a nonprofit entity; or

(5) provide not less than 50 percent of an employed student's wages and 100 percent of other employee benefits for the employed student, if the employer is a profit-making entity.

(b) Institutions eligible to receive Title III funds from the U. S. Department of Education are exempted from the **Program** [~~general work-study program~~] requirement to provide 25 percent of an employed student's wages, if they provide the Board with a copy of a current Title III eligibility letter from the U. S. Department of Education.

(c) Beginning with the 2016-2017 academic year, each eligible institution shall ensure that at least 20 percent, but not more than 50 percent of the employment positions provided through the work-study program in an academic year are provided by eligible employers who are providing off-campus employment.

§22.132 Award Amounts and Uses

(a) Funding. Funds awarded through this program may not exceed the amount appropriated by the Legislature for that purpose, plus matching funds provided by the students' employers.

(b) Award Amount. No award amount shall exceed a student's financial need.

(c) Uses. No [~~general work-study~~] funds earned through this program may be used for any purpose other than for meeting the cost of attending an approved institution.

(d) Over awards. If, at a time after an award has been offered by the institution and accepted by the student, the student receives assistance that was not taken into account in the student's estimate of financial need, so that the resulting sum of assistance exceeds the student's financial need, the institution is not required to adjust the award under this program unless the sum of the excess resources is greater than \$300.

§22.133 Allocation and Disbursement of Funds

(a) Allocations. Allocations for the [~~Texas College Work-Study~~] Program are to be determined on an annual basis as follows:

(1) All eligible institutions will be invited to participate; those choosing not to participate will be left out of the calculations for the relevant year.

(2) The allocation base for each institution choosing to participate will be the number of students it reported in the most recent financial aid database report who met the following criteria:

(A) were classified as Texas residents;

(B) were enrolled at least half-time, with full-time students weighted as 1 and part-time students weighted as .5;

(C) completed either the FAFSA or TASFA; and

(D) have a 9-month Expected Family Contribution less than the simple average in-district 9-month cost of attendance for community college students enrolled for 30 semester credit hours while living off campus, as reported in the most recent year's College Student Budget Report.

(3) Each institution's share of the available funds will equal its share of the state-wide total of students who meet the criteria in paragraph (2) of this subsection.

(b) Verification of Data. Allocation calculations will be shared with all participating institutions for comment and verification prior to final posting and the institutions will be given 10 working days, beginning the day of the notice's distribution and excluding State holidays, to confirm that the allocation report accurately reflects the data they submitted or to advise Board staff of any inaccuracies.

(c) Disbursements. At the beginning of each year or upon request by the institution, the year's full allocation or funds needed for immediate disbursement to students will be provided to each participating institution for use in reimbursing students for their work.

(d) Reallocations. Institutions will have until February 20 or the first workday thereafter if it falls on a holiday or a weekend to encumber all funds allocated to them. On that date, institutions lose claim to their unencumbered funds and the unencumbered funds are available to the Board for reallocation to other institutions requesting reallocated funds, calculated on the same basis as the original allocation. If necessary for ensuring the full use of funds, subsequent reallocations may be scheduled until all funds are awarded and disbursed.

(e) Summer Awards. Unless given specific permission by the Board to use funds for summer awards, schools will be required to utilize their original state work-study allocation of funds for employment during the nine-month academic year (fall and spring terms). However, institutions may use reallocated funds for summer awards but the funds must be expended by August 31 of the fiscal year.

~~§22.134 Dissemination of Information and Rules~~

~~The Board is responsible for publishing and disseminating general information and program rules for the program described in this subchapter.]~~

§22.134 ~~§22.135~~ Authority to Transfer Funds

Institutions participating in a combination of the Toward EXcellence, Access and Success Grant, Texas Educational Opportunity Grant, Tuition Equalization Grant, and Texas College Work-Study Programs, in accordance with instructions from the Board, may transfer in a given fiscal year up to the lesser of 10 percent or \$20,000 between these programs.

~~§22.136 Biennial Report and Data Collection~~

~~Not later than January 1 of each odd-numbered year, the Board shall submit to the legislative higher education standing committees and post on its website a report on the Texas College Work-Study Program. The report must include the total number of students employed through the program, disaggregated by: the employment's position's location on or off campus; and the employer's status as a for-profit or nonprofit entity. The Board shall submit its initial report not later than May 1, 2019.]~~