

**2022-23**

**Program Guidelines**

**Work-Study Student**

**Mentorship Program**

**(WSMP)**

**Texas Higher  
Education**  
COORDINATING BOARD

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# WORK-STUDY STUDENT MENTORSHIP PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 1](#).

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## PROGRAM AUTHORITY AND PURPOSE ([TAC, Title 19, Section 22.127](#))

The Work-Study Student Mentorship Program (WSMP) is authorized by [TEC, Title 3, Chapter 56, Subchapter E, Section 56.079](#). Rules for administering the program can be found in [TAC, Title 19, Chapter 22, Subchapter G](#). The purpose of WSMP is to provide employment to eligible students with financial need to mentor, tutor, or advise students at participating institutions of higher education or high school students within local school districts and nonprofit organizations. The primary goal of the program is to improve and increase student access, success, and completion of higher education and to provide employed WSMP students with an opportunity to gain and strengthen career readiness skills. These student mentor, tutor, and advising positions are funded by a combination of state appropriations provided by the Texas College Work-Study (TCWS) Program and matching funds from participating institutions.

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## ELIGIBLE INSTITUTIONS ([TAC, Title 19, Section 22.129](#))

Any public, private, or independent institution of higher education as defined in [TEC, Title 3, Section 61.003](#), except theological or religious seminary institutions, is invited annually to participate in the WSMP allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable award year. Independent institutions of higher education offering only professional or graduate degrees are **NOT** eligible to participate in the WSMP.

## PROGRAM PARTICIPATION REQUIREMENTS

### INSTITUTION REQUIREMENTS ([TAC, Title 19, Section 22.129](#))

To participate in the WSMP, an eligible institution must establish a Work-Study Student Mentorship Program designed to improve and increase student access, success, and completion of higher education and provide employed WSMP students with opportunities to gain and strengthen future career readiness skills. Programs must be structured to offer on-campus or off-campus mentoring, tutoring, or advising services. Institutions should make every effort to incorporate services to underrepresented students.

Institutions that implement an **off-campus** program to serve local high school students must partner with school districts and nonprofit organizations through a memorandum of understanding (MOU). The MOU agreement details the roles and responsibilities of each participating entity and must be in place before program implementation. The institution must provide a copy of the MOU to the THECB ([sample MOU](#)).

#### Each Work-Study Student Mentorship Program must provide:

- part-time employment to eligible students as mentors, tutors, or advisors;
  - salary requirements:
    - minimum of \$10 an hour
    - maximum of 20 hours per week
- training as determined by the THECB and participating institutions;
- program oversight; and
- matching funds, including partner match (see [Required Matching](#) section).

### TRAINING REQUIREMENTS ([TAC, Title 19, Section 22.130](#))

Participating institutions must ensure that WSMP award recipients receive training that covers the following topics:

- Overview of the THECB’s strategic plan and the role the recipient will play to help meet the goals and objectives of the plan
- Overview of general knowledge around college access and completion
- Overview of career readiness skills that could be attained during employment
- Personal, public, economic, and societal benefits of higher education
- Specific information about applying to college, including college exploration, the admission process, authoring personal essays, completing the financial aid process, and submitting college application forms
- Overview of **ADVi**, a chatbot that uses artificial intelligence to provide support to Texans looking to attend or return to higher education

**⚠️ ALERT:** To understand the role and capabilities of **ADVi**, go to [askAdvi](#) and follow the steps under “Accessing ADVi” to request a demonstration.

## WSMP ACTIVITY EXAMPLES

- Provide information to high school students about higher education, including the college selection process, the application process, and financial aid options.
- Assist students in finding and using appropriate resources, such as the [College for All Texans website](#).
- Assist students in completing the Free Application for Federal Student Aid (FAFSA), the Texas Application for State Financial Aid (TASFA), ApplyTexas application, or other college applications.
- Assist in special outreach events, such as College Nights or FAFSA Saturdays.
- Assist college students with academic tutoring or mentoring.
- Assist with student interventions focused on increasing completion of degrees or certificates, such as interventions occurring through peer advising or supplemental instruction.
- Establish a student and parent outreach center through community partnerships and provide tools and information to help families make decisions about going to college.
- Encourage and assist students in their interactions with **ADVi** to help guide them through the college process.

## ELIGIBILITY

### ELIGIBILITY REQUIREMENTS ([TAC, Title 19, Section 22.130](#))

Student WSMP eligibility requirements are the same as those in the Texas College Work-Study Program. To ensure applicant eligibility, program leads should check with their financial aid office to determine whether students can be employed by the WSMP.

#### TO RECEIVE A WSMP AWARD, A STUDENT MUST:

- ✓ be classified by the institution as a Texas resident;
- ✓ be registered with Selective Service, or be exempt;
- ✓ have financial need;
- ✓ be enrolled at least half- time at the participating institution in a plan leading to a degree or certification;
- ✓ not be a recipient of an athletic scholarship (i.e., the student is obliged to play an intercollegiate sport as a condition of receiving the scholarship) during any semester the student is awarded WSMP funds; and
- ✓ not be 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.



**STOP:** To ensure compliance with program requirements, the THECB will conduct desk reviews and site visits. For information regarding records and retention, please refer to the signed program participation agreement (PPA) between participating higher education institutions and the THECB.

The following program administration areas are overseen by the financial aid office:

- State Priority Deadline
- Selective Service Statement
- Calculating Award Amounts



#### **ALERT: Child Support Arrearages**

Per [Texas Family Code, Title 5, Section 231.006](#), a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## ADDITIONAL INFORMATION

### NON TEXAS RESIDENT STUDENTS

Non Texas resident students are not eligible to receive WSMP funds even if they are eligible to pay resident tuition.

### NON CITIZEN STUDENTS

A Texas affidavit (non citizen) student who can provide the appropriate documentation proving eligibility to be employed in the United States may secure employment through the WSMP. This includes Deferred Action for Childhood Arrivals recipients.

### STATE PRIORITY DEADLINE

The THECB sets the same priority deadline ([TEC, Section 56.008](#) and [TAC, Title 19, Section 22.6](#)) for applications that qualify for all state funded financial aid in an academic year. General Academic Teaching Institutions in Texas (including Lamar State College Orange and Lamar State College Port Arthur), as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

## ELIGIBILITY



### SELECTIVE SERVICE STATEMENT ([TAC, Title 19, Section 22.3](#))

Under [TEC, Title 3, Section 51.9095](#), an individual must file a statement of their selective service status with the institution confirming registration or exemption.

This statute applies to all state-funded financial aid, as well as “federal funds or gifts and grants accepted by this state.” The statement is required from students receiving federal aid or private donations that pass through the state Treasury or Governor’s office (i.e., Governor’s Emergency Education Relief (GEER)), state-appropriated funds, or institutional funding, which includes programs funded by tuition set-asides, exemptions, and waivers.

#### **ALERT: Proof of Selective Service Status No Longer Required**

Institutions are no longer required to collect “proof” of registration or exemption from students or to verify the accuracy of the statement against external databases or other resources if conflicting information does not exist (see [Updated Guidance on Statutory Requirements that Impact Financial Aid Memo](#)).

**Note:** The THECB approved an amendment to TAC, Title 19, Section 22.3 during their quarterly meeting held on April 28, 2022.

Any of the following can be used to meet the statutory statement requirement:

- THECB Selective Service Statement of Registration Status ([English Statement](#) or [Spanish Statement](#))
- Printout from [SSS.gov](#) website
- Institutional Student Information Record (ISIR) if status is available
- THECB Selective Service Statement of Registration Status imbedded in the Texas Application for State Financial Aid (TASFA)

### SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

In accordance with [Texas Education Code, Section 51.9095](#), male students must file a Selective Service Statement of Registration Status with their institution or other entity granting financial assistance. For more information about the Selective Service System, visit [sss.gov](#).

Please mark **one** option below:

<input type="checkbox"/> I was born female and not required to register.	<input type="checkbox"/> I was born male and am <b>EXEMPT</b> from registration because: (please briefly explain why you are exempt in the box below.)
<input type="checkbox"/> I was born male and am under the age of 18 and not currently required to register.	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>
<input type="checkbox"/> I was born male and am <b>REGISTERED</b> with the Selective Service.	
<input type="checkbox"/> I was born male and am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	

I, \_\_\_\_\_, hereby certify that the Selective Service status statement provided above is true and accurate.

Student ID: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Complete and return to the Financial Aid Office at your institution of higher education.

Selective Service Statement of Registration Status As of 09/28/2021

## ADDITIONAL INFORMATION

### COLLECTION METHOD

The institution has flexibility to create an online, paper, or alternate method to collect the statement as long as it uses the content developed and required by the THECB.

### FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement collected can be used for subsequent semesters at the same institution.

If the student is NOT registered for selective service, a statement must be collected each time they apply for financial aid or a student loan until the statement indicates registered or exempt.

### MALES AGE 26 OR OLDER

Individuals older than the maximum age at which an individual is required to be registered with the Selective Service System under federal law are not required to complete this status statement.

### RETENTION SCHEDULE

The status statement must be retained in the student’s record based on the retention schedule outlined in the institution’s Program Participation Agreement (PPA).

## AWARDING

Funds awarded to the employed student are considered financial aid for the academic year in which the funds are earned and therefore cannot exceed the student's financial need.

In determining who should receive a WSMP award, a student's financial need must be calculated.

**Financial need** is defined as the cost of attendance (COA) minus the expected family contribution (EFC) ([TAC, Title 19, Section 22.1](#)).

**Example 1:**

$\$10,000$  (COA) –  $\$3,000$  (EFC) =  $\$7,000$  (financial need)

In this example, the student has financial need and may be eligible for a WSMP award up to \$7,000 for the academic year.

**Example 2:**

$\$10,000$  (COA) –  $\$15,000$  (EFC) =  $-\$5,000$  (no financial need)

In this example, the student has no financial need and is not eligible for a WSMP award for the academic year.

## PROCESSING FUNDS

At the start of the fiscal year, each participating institution's full allocation of funds for the WSMP will be disbursed. Funds designated for public universities, health-related institutions, and technical institutes will be transferred to each institution's cost center at the Texas Comptroller's office. Funds for community colleges and private/independent institutions will be sent to each institution's designated fiduciary institution via electronic funds transfer.

WSMP funds may be issued to eligible students throughout the academic year, including summer. Funds may be used only for hourly wages paid to eligible student mentors, tutors, or advisors. Each biennium, funds not expended by the institution in the first year can be carried forward for use in the second year. Any carry-forward funds not expended in the second year of the biennium must be returned to the THECB. Although the WSMP has carry-forward authority, every effort should be made to expend funds within the same year that the funds are disbursed to the institution.

### Carry Forward During the Biennium

**FY 2023:**


- State fiscal year begins September 1, 2022 and ends August 31, 2023.
- Unexpended FY 2023 funds can be *carried forward* into FY 2024.
- Unexpended FY 2023 funds **CANNOT** be *carried forward* into FY 2025.

**NOTE:** A *biennium* is defined as a two-year state budget period. Any carry-forward funds not expended in the second year of the biennium must be returned to the THECB.

## REQUIRED MATCHING ([TAC, Title 19, Section 22.129](#))

Participating institutions must provide at least a 10% match of a WSMP-employed student's wages. In addition, institutions are required to fund 100% of a student's employee benefits. Institutional funds used for the wage match and employee benefits must come from sources other than federal college work-study.

Institutions that are **eligible for Title III funds** from the U.S. Department of Education are **exempt from all matching requirements for the WSMP**. To qualify for this exemption, an institution must submit a current copy of its Title III eligibility letter to the THECB (see [Reporting Requirements](#)).

 **ALERT:** School district and nonprofit partners must contribute matching funds (either cash or in-kind) that are at least equal to the amount of the institution's contribution. The amount will be determined within the MOU with the participating WSMP institution. The school district and nonprofit partners must provide documentation of their matching funds to the institution.


**IMPORTANT:** School district and nonprofit partners are **exempt** from the matching requirements if the participating WSMP institution is exempt from the 10% match of a WSMP-employed student's wages.

## AUTHORITY TO TRANSFER FUNDS ([TAC, Title 19, Section 22.11](#))

Institutions participating in a combination of Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, Texas Educational Opportunity Grant (TEOG), and Tuition Equalization Grant (TEG)), may transfer up to **25%** of the institution's total annual program allocation or **\$60,000** (whichever is less) between programs within the relevant fiscal year. This threshold applies to the program from which the funds are transferred.

Institutions participating in both the WSMP and TCWS may transfer up to 25% between the two programs. This threshold applies to the program from which the funds are transferred.

Transfer requests are submitted through an [Authority to Transfer form](#). The form will not be available until Fall 2022. Institutions requesting a transfer of funds must submit a request by **July 1, 2023**. The THECB Financial Aid Services staff will respond to the institution to provide next steps for the process.

 **ALERT:** The allowable amounts for the Authority to Transfer Funds process have changed from 10% to 25% and from \$20,000 to \$60,000 as a result of legislation in the 87th Legislative Session.

**Note:** The THECB approved an amendment to [TAC, Title 19, Section 22.11](#) during their quarterly meeting held on April 28, 2022.



## REPORTING

### REPORTING REQUIREMENTS

Participating institutions must report to the THECB the progress made by students being assisted through the WSMP. To comply with the Family Educational Rights and Privacy Act (FERPA), participating institutions must have the authority to gather, review, and report to the THECB appropriate data from all partners for evaluation purposes.

#### **ALERT: ONLINE REPORTING PROCESS**

WSMP institutions submit program progress reports and applicable supplemental documents (e.g., Title III Waiver, Off-Campus MOU) through the WSMP Institution Online Report Portal.

**Note:** Reporting templates provided in [Appendix 1](#) can be used as a resource to prepare for portal submission.

Each institution designates a WSMP Institution Online Report Portal account holder who will be responsible for submitting the required program progress reports. Portal account set up, instructions on how the portal functions, and how to submit report data are provided within the [WSMP Institution Online Report Portal Guide](#).


To meet the reporting requirements, institutions must submit a **Financial Report** and an **Annual Program Summary Report** that collect aggregate information.

**Reporting** includes each of the following:

- Number of students employed as mentors, tutors, or advisors in the preceding year
- Number of college students from the participating institution receiving mentoring, tutoring, or advising in the preceding year
- Number of high school students receiving mentoring, tutoring, or advising from students of the participating institution in the preceding year
- Information relating to the costs of the program
- Program overview
- Type of activities implemented

The table below shows the due dates for the required reports. If the due date falls on a holiday or a weekend, reports are due on the following business day.

Financial Report and Annual Program Summary Report		
Report	Reporting Period	Due Date
<ul style="list-style-type: none"> <li>• Financial Report                             <ul style="list-style-type: none"> <li>○ Upload Title III Eligibility Letter if applicable</li> </ul> </li> </ul>	September 1 - May 31, 2023	June 5, 2023
<ul style="list-style-type: none"> <li>• Financial Report</li> <li>• Annual Program Summary Report                             <ul style="list-style-type: none"> <li>○ Upload Off-Campus MOU if applicable</li> </ul> </li> </ul>	September 1 - August 31, 2023	September 5, 2023

 **STOP:** The data submitted on the **Financial Report** will be used to reconcile totals submitted to the THECB on the **Financial Aid Database**. To ensure data are reported accurately, program directors should reconcile expenditures with the campus financial aid office.

**Note:** Failure to meet the program reporting requirements may result in the loss of funding.

# APPENDIX 1: QUICK REFERENCES

## CONTACT INFORMATION

<p style="text-align: center;"><b>Vanessa Malo</b>                  Assistant Director, Work-Based Learning                  Phone: (512) 427-6267                  Email: <a href="mailto:Vanessa.Malo@highered.texas.gov">Vanessa.Malo@highered.texas.gov</a></p>	<p>Contact us by completing an <a href="#">online inquiry form</a> and select “Financial Aid Question” as the Contact Reason.</p>
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## PROGRAM RULES AND STATUTES

Texas Program Statutes	<a href="#">Texas Education Code TEC, Title 3, Chapter 56, Subchapter E [PDF]</a>
Texas Program Rules	<a href="#">Texas Administrative Code TAC, Title 19, Chapter 22, Subchapter A [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter G [PDF]</a>

## WEBSITES, PORTALS AND GUIDES

General program information for institutions	<a href="#">Student Financial Aid Programs Information Webpage</a>
General college enrollment and financial aid information for students	<a href="#">College for All Texans</a>
Reporting program data portal	<a href="#">CBPass Portal</a> <a href="#">WSMP Institution Online Report Portal Guide [PDF]</a>
Secure file transfer and processing portal	<a href="#">MOVEit DMZ</a> <a href="#">MOVEit DMZ User Access Guide [PDF]</a>
THECB Ask ADVi - About Us	<a href="https://www.askadvi.org/about/">https://www.askadvi.org/about/</a>
THECB Ask ADVi - FAQs	<a href="https://www.askadvi.org/fag/">https://www.askadvi.org/fag/</a>

## FORMS AND INSTRUCTIONS

Spreadsheet for compiling data to complete Program Financial Report	<a href="#">Financial Report Template [XLSX]</a>
Spreadsheet for compiling data to complete Annual Program Summary Report	<a href="#">Annual Program Summary Report Template [XLSX]</a>
Sample Memorandum of Understanding (MOU) between institution and independent school district	<a href="#">Sample MOU [PDF]</a>
Form for returning program funds	<a href="#">Special Programs Online Return of Funds Form</a>
Instructions for issuing payments or refunds to the THECB	<a href="#">Electronic Funds Transfer Instructions [PDF]</a>