

Financial Aid Advisory Committee  
Meeting Notes  
(To be approved at the Sept. 8, 2022 meeting)

<b>Committee Members in Attendance Via <u>Virtual</u> Meeting Connection</b>		<b>Committee Members Absent</b>
Denise Welch, Chair Rachelè Garrett, Vice-Chair DeChá Reid, THECB Rep Jackie Adler Ben Bholan Victoria Chen Bridgette Ingram Ed Kerestly, Past-Chair Melet Leafgreen Robert Merino, TASFAA Rep Holly Nolan Shonna Norton	Joseph Ruiz Tevian Sides Thomas Ratliff Joy Thomas DeDe Gonzales Jase Kugiya Sal Ramirez Gilbert Zavala	Steven Peterson Cecelia Jones Arnold Trejo Ben Bholan
<b>Agenda Item 1. Welcome, Introductions and Overview of Meeting</b>		<b>Denise Welch, Chair</b>
<b>Handout Provided: Yes</b>		<b>Formal Decision/Action Required</b> N/A
<b>Summary:</b>  **See handout for agenda item 1 for more information		
<b>Agenda Item 2. Consideration of Approval of Minutes from the meeting held on Dec. 9, 2021</b>		<b>Denise Welch, Chair</b>
<b>Handout Provided: Yes</b>		<b>Formal Decision/Action Required</b> Minutes approved
<b>Summary:</b>  <ul style="list-style-type: none"> <li>• No corrections were identified.</li> </ul> **See handout for agenda item 2 for more information.		
<b>Agenda Item 3. Update: Prior FAAC Business</b>		<b>DeChá Reid Senior Director</b>
<b>Handout Provided: No</b>		<b>Formal Decision/Action Required</b> N/A
<b>Update Summary:</b>  <ul style="list-style-type: none"> <li>• <b>College Student Budgets:</b> There was a potential delay in tuition and fees from schools.               <ul style="list-style-type: none"> <li>• Is there some flexibility with the deadline?</li> <li>• What is the process for modifying the tuition cost?</li> </ul> </li> </ul>		
<b>Agenda Item 4. Presentation: Building a Talent Strong Texas</b>		<b>Melissa Henderson, Associate Commissioner, Strategic Partnerships &amp; Executive Director</b>
<b>Handout Provided: Yes</b>		<b>Formal Decision/Action Required</b> N/A
<b>Presentation Summary:</b>  <ul style="list-style-type: none"> <li>• Melissa Henderson presented on Building a Talent Strong Texas and provided information on the following:               <ul style="list-style-type: none"> <li>○ Stakeholder Engagement</li> <li>○ Attainment of Postsecondary Credentials</li> <li>○ Postsecondary Credentials of Value</li> <li>○ Research, Development and Innovation</li> <li>○ Advancing Equity for the Benefit of All Texas</li> </ul> </li> </ul> **See handout for agenda item 4 for more information		
<b>Agenda Item 5. Presentation: Texas OnCourse Academy</b>		<b>Laura Brenna, Assistant Commissioner, Innovation and Development</b>
<b>Handout Provided: Yes</b>		<b>Formal Decision/Action Required</b> N/A
<b>Presentation Summary:</b>  <ul style="list-style-type: none"> <li>• Laura Brenna presented on Texas OnCourse Academy and provided information on the following:               <ul style="list-style-type: none"> <li>○ Texas OnCourse Background</li> </ul> </li> </ul>		

Financial Aid Advisory Committee  
Meeting Notes  
(To be approved at the Sept. 8, 2022 meeting)

<ul style="list-style-type: none"> <li>○ Statewide Collaboration</li> <li>○ Core Offerings</li> <li>○ Academy Dashboard</li> <li>○ Academy Modules</li> <li>○ Digital Learning</li> <li>○ Map My Path</li> <li>○ My Texas Future</li> </ul> <p style="text-align: center;">**See handout for agenda item 5 for more information</p>	
<b>Agenda Item 6. Presentation: Texas Leadership Scholars Program</b>	<b>Matt Parson, Assistant Commissioner, Workforce Innovation</b>
<b>Handout Provided: Yes</b>	<b>Formal Decision/Action Required</b> N/A
<p><b>Presentation Summary:</b></p> <ul style="list-style-type: none"> <li>• Matt Parson presented on the Texas Leadership Scholars Program and provided information on the following: <ul style="list-style-type: none"> <li>○ Goals</li> <li>○ Eligibility – Students</li> <li>○ The Student Experience</li> <li>○ Financial Commitment</li> <li>○ Institutional Partners</li> <li>○ Student Application Process</li> </ul> </li> </ul> <p style="text-align: center;">**See handout for agenda item 5 for more information</p>	
<b>Agenda Item 7. Update: External Relations</b>	<b>John Wyatt, External Relations</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required</b> N/A
<p><b>Update Summary:</b></p> <ul style="list-style-type: none"> <li>• Interim Activities of the Legislation Session <ul style="list-style-type: none"> <li>○ House and Senate committees were provided with the interim charges.</li> <li>○ Commissioner Keller testified on several occasions for Higher Education.</li> <li>○ Commissioner Keller was jointed by other commissioners within the tri-agency on the partnership.</li> <li>○ Hearings will slow down during the summer and pick up late-summer and fall</li> <li>○ Agency focus is the LAR (Legislative Appropriation Request) for the next biennium (2024-25).</li> <li>○ Working on ways to continue to support higher education by providing the data and analysis to Legislators. <ul style="list-style-type: none"> <li>▪ Selective Service with matching the federal requirements</li> <li>▪ FAFSA/TASFA changes</li> <li>▪ Student Aid Index</li> </ul> </li> </ul> </li> </ul>	
<b>Agenda Item 8. Update: THECB Financial Aid Strategic Priority</b>	<b>Charles Conterò-Puls, Assistant Commissioner</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required</b> N/A
<p><b>Update Summary:</b></p> <ul style="list-style-type: none"> <li>• <b>Agency Strategic Architecture</b> <ul style="list-style-type: none"> <li>○ Continue to work on the architecture</li> <li>○ Outreach to the Financial Aid Community on what strengthens the financial aid ecosystem. Survey to follow in June.</li> </ul> </li> <li>• <b>Texas Transfer Grant Pilot Program</b> <ul style="list-style-type: none"> <li>○ Participating public universities and HRI's will receive recipient rosters</li> <li>○ Student are listed on the 2022-23 FAFSA</li> </ul> </li> <li>• <b>Continued work on Technology Infrastructure</b> <ul style="list-style-type: none"> <li>○ Will onboard new technology with a new system that will help the Transfer Grant and other financial aid programs. The new technology should be in place by September.</li> <li>○ Will onboard two repayment programs in September as well as other programs later in the year. The next program will be TCWS.</li> <li>○ The long-term goal is to bring all the state financial aid programs</li> <li>○ Plan to launch programs at the start of the fiscal year. The programs can take up to 24 months to launch all programs into the new repayment system.</li> </ul> </li> </ul>	

Financial Aid Advisory Committee  
Meeting Notes  
(To be approved at the Sept. 8, 2022 meeting)

<b>Agenda Item 9. Joint Update: TASFA Subcommittee: House Bill 3 (FAFSA/TASFA Graduation Requirement) and House Bill (On-Line TASFA)</b>	<b>Bridgette Ingram, Subcommittee Chair; Claudette Jenks, Director, College Readiness; and Leah Smalley, Assistant Director, THECB</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required</b> N/A
<b>Update Summary:</b>	
<ul style="list-style-type: none"> <li>• <b>Development for the online TASFA</b> <ul style="list-style-type: none"> <li>○ Mirroring questions for the TASFA based on the FAFSAS</li> <li>○ Starting the User Acceptance Testing with the internal members</li> <li>○ Will have iterations of testing the application from June-August</li> <li>○ Schools will be involved in the file transfer</li> <li>○ Memo sent to the financial aid community on May 10, 2022 on the file layout</li> </ul> </li> </ul>	
<b>Agenda Item 10. Update: Dada Collection Subcommittee</b>	<b>Dede Gonzales, Subcommittee Chair</b>
<b>Handout Provided: Yes</b>	<b>Formal Decision/Action Required</b> N/A
<b>Update Summary:</b>	
**See handout for agenda item 10 for more information	
<b>Agenda Item 11. Legislative Subcommittee</b>	<b>Arnold Trejo, Subcommittee Chair</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required</b> N/A
<b>Update Summary:</b>	
<ul style="list-style-type: none"> <li>• <b>No Update</b></li> </ul>	
<b>Agenda Item 12. Update: Texas Association for State Financial Aid Administrators (TASFAA)</b>	<b>Robert Merino, TASFAA President</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required</b> N/A
<b>Update Summary:</b>	
<ul style="list-style-type: none"> <li>• NAOW was held in April with a successful turnout</li> <li>• TASFAA Award nominations will open in early June</li> <li>• Elections for 2022-23 Board members is planned for July</li> </ul>	
<b>Agenda Item 13. Update: High School District</b>	<b>Ben Bholan, Arlington ISD; Shonna Norton, Wichita Falls ISD</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required</b> Yes/Motion Passed
<b>Update Summary:</b>	
<ul style="list-style-type: none"> <li>• <b>FAFSA Graduation Requirement</b> <ul style="list-style-type: none"> <li>○ Enrollment was down in Districts; more applications processed this school year than in the past. Thirty to forty more FAFSA's and TASFA's were completed</li> <li>○ Hoping that more applications will mean higher enrollment for IHE's</li> </ul> </li> </ul>	
<b>Agenda Item 14. Update: Office of Student Financial Aid Programs</b>	<b>DeChà Reid, Senior Director, THECB</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required</b> No
<b>Discussion Summary:</b>	
<ul style="list-style-type: none"> <li>• Recent Announcement Announcements <ul style="list-style-type: none"> <li>○ 5/10/2022 TASFA FY 2024 File Layout Memo</li> <li>○ 5/17/2022 Good Neighbor Program FY 2023 Selected Students Memo</li> <li>○ 5/17/2022 User Access 2022 Annual Review for Financial Aid Web Portals Memo</li> <li>○ 5/23/2022 TEXAS Grant, TEOG, TEG FY 2023 Program Guidelines Memo</li> </ul> </li> <li>• <b>Upcoming Deadlines</b></li> </ul>	

Financial Aid Advisory Committee  
Meeting Notes  
(To be approved at the Sept. 8, 2022 meeting)

<ul style="list-style-type: none"> <li>○ TEXAS Grant, Texas college Work-Study, Work-study Student Membership, and Educational Aide Exemption data review discrepancies or Opt-in/Opt-out form due June 6, 2022 (sent to Financial Aid Directors)</li> <li>○ User Access Annual Review-Online Verification form due June 10, 2022</li> <li>○ FY22 FAD-Second Cycle Opens on June 15, 2022</li> <li>○ Authority to Transfer Request form due on July 1, 2022</li> <li>● <b>SFAP accomplishments since the June 2, 2022 FAAC Meeting</b> <ul style="list-style-type: none"> <li>○ The Texas Armed Services Scholarship Program (TASSP) Nomination Portal on April 19, 2022 for Legislators to submit their nominations for the 2022-23 academic year. The Texas Higher Education Coordinating Board encourages offices to submit TASSP nominations by August 1, 2022, so that students may receive funds early in the fall semester to assist with their educational expenses. Final deadline to submit a TASSP nomination is October 31, 2022.</li> <li>○ The Texas Higher Education Coordinating Board is testing a new process called "Watchlist". "Watchlist" will identify borrowers who have loans in default or litigation status in HELMS and will pause the application process for a new loan, alerting the borrower to contact our office to discuss the status of their account.</li> <li>○ The Texas Higher Education Coordinating Board will begin testing for federal interest rate changes to effect on July 1, 2022. This will also include rate change for variable rate CAL loans.</li> </ul> </li> </ul>	
<b>Agenda Item 15. Update: Recognition of members stepping down</b>	<b>Denise Welch, Chair</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required N/A</b>
<b>Discussion Summary:</b>	
<ul style="list-style-type: none"> <li>● Six members were recognized for their work on the Financial Aid Advisory Committee. The June meeting was their last meeting. <ul style="list-style-type: none"> <li>○ Ed Kerestly</li> <li>○ Joy Thomas</li> <li>○ Ben Bholan</li> <li>○ Jace Lugiya</li> <li>○ Steven Peterson</li> <li>○ Robert Merino</li> </ul> </li> </ul>	
<b>Agenda Item 16. Discussion Topic: Recommendation on Proposed Nominees for FAAC</b>	<b>DeChà Reid, Senior Director, THECB</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required N/A</b>
<b>Discussion Summary</b>	
<ul style="list-style-type: none"> <li>● <b>Recommended new Financial Aid Advisory Committee members for the July Board meeting</b> <ul style="list-style-type: none"> <li>○ 2-Public Universities</li> <li>○ 2-Private Universities</li> <li>○ 1-HRI</li> <li>○ 1-Community College</li> <li>○ 1-ISD <ul style="list-style-type: none"> <li>▪ Reginald Brazzle, Director, Scholarships &amp; Financial Aid – Lamar University</li> <li>▪ Scott Lapinski, Director of Financial Aid – University of Texas Permian Basin</li> <li>▪ Lynda McKendree, Dean of Scholarships and Financial Aid – University of St. Thomas</li> <li>▪ Thomas Ratliff, Director of Student Financial Services – Abilene Christian University</li> <li>▪ Joseph Sanchez, Director of Financial Aid – University of North Texas Health Science Center</li> <li>▪ Gaby Leon, Director of Financial Aid – Alvin Community College</li> <li>▪ Lisa Schoenbrun, Coordinator, College Readiness – El Paso ISD</li> <li>▪ Dede Gonzales, President-Elect, TASFAA Representative</li> </ul> </li> </ul> </li> </ul>	
<b>Agenda Item 17. Discussion Topic: Addressing the unemployment compensation reported by students and parents</b>	<b>DeChà Reid, Senior Director, THECB</b>
<b>Handout Provided: No</b>	<b>Formal Decision/Action Required N/A</b>
<b>Discussion Summary</b>	
<ul style="list-style-type: none"> <li>● Congressional changes to the tax treatment of Untaxed Income benefits could impact financial aid for some students and many families that are applying for financial aid. Essentially, some families may have included Untaxed Income benefits as adjusted gross income for 2020, even though this was later changed in the American Rescue Plan Act (ARPA) on March 11, 2020. ARPA created a \$10,200 federal tax exclusion for each taxpayer with income and total income under \$150,000.</li> </ul>	

Financial Aid Advisory Committee  
Meeting Notes  
(To be approved at the Sept. 8, 2022 meeting)

<ul style="list-style-type: none"> <li>○ How are schools working with families on this issue? <ul style="list-style-type: none"> <li>▪ Using professional judgement on families</li> <li>▪ Not flooded with high numbers of families based on this issue</li> <li>▪ Currently have not implanted an internal policy to target these families</li> </ul> </li> <li>○ Have you seen any impact on financial aid awards that have been offered? <ul style="list-style-type: none"> <li>▪ There has not been much impact seen because it is difficult to identify unless the student is selected for verification.</li> </ul> </li> </ul>	
<b>Agenda Item 18. Discussion Topic – Leveraging Financial Aid</b>	<b>Thomas Ratliff, Director of Financial Aid, Abilene Christian University</b>
<b>Handout Provided: Yes</b>	<b>Formal Decision/Action Required</b> N/A
<p><b>Discussion Summary</b></p> <ul style="list-style-type: none"> <li>• Thomas Ratliff presented on Levering Financial Aid and provided information on the following: <ul style="list-style-type: none"> <li>○ Leveraging Concept</li> <li>○ Reasons for Target</li> <li>○ Recruitment Enrollment Funnel</li> <li>○ Retention Funnel</li> <li>○ Types of Leveraging Approaches</li> <li>○ Academic Merit Awards</li> <li>○ Performance Based</li> <li>○ Specialty</li> <li>○ Housing</li> <li>○ Perception</li> <li>○ Timing of Awards</li> <li>○ Renewal of Awards</li> <li>○ Net Results</li> </ul> </li> </ul>	
<b>Agenda Item 19. Discussion Topic – Ways to address roadblocks with recruiting and retaining students</b>	<b>Denise Welch, Chair</b>
<b>Handout Provided: No</b>	
<p><b>Discussion Summary</b></p> <ul style="list-style-type: none"> <li>• Look at all funding avenues holistically to see where it may impact a student whether that is completion or graduation</li> <li>• Some roadblocks are a decrease in enrollment <ul style="list-style-type: none"> <li>○ Is it recruiting or lack of completion?</li> </ul> </li> <li>• Look at data to see where students are at in their educational journey</li> <li>• Look at data at the institutions through the Institutional Research</li> <li>• Dual Credit students are on the rise, which means that they are not considered first-time college students. This changes the funding or enrollment, specifically at community colleges.</li> <li>• Possible change to recruiting approaches to include more adult-learners</li> <li>• Review the processes that may have a roadblock for students to enroll in 2- or 4-year institution of higher education</li> </ul>	
<b>Agenda Item 20. Transition of Leadership</b>	<b>Denise Welch, Chair</b>
<b>Handout Provided: No</b>	
<ul style="list-style-type: none"> <li>• The Chair position for the FAAC transitioned from Denise Welch to Rachelè Garrett</li> </ul>	
<b>Agenda Item 21. Feedback for Future Meetings</b>	<b>Rachelè Garrett, Chair</b>

Financial Aid Advisory Committee  
Meeting Notes  
(To be approved at the Sept. 8, 2022 meeting)

<b>Handout Provided: No</b>	
<ul style="list-style-type: none"> <li>• Research related to FAFSA completion</li> <li>• Graduation rates</li> <li>• HEEREF outcomes <ul style="list-style-type: none"> <li>◦ Did it help with persistence and enrollment?</li> </ul> </li> <li>• Student Aid Index and the impact it will have at the state level</li> </ul>	
<b>Agenda Item 22. Adjournment</b>	<b>Rachelè Garrett, Chair</b>
<ul style="list-style-type: none"> <li>• Adjourned at 12:43 p.m.</li> </ul>	