

Financial Aid Advisory Committee
March 2, 2023, Meeting Notes

| Committee Members in Attendance Via <u>Virtual</u> Meeting Connection | | Committee Members Absent |
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| Rachelè Garrett, Chair Denise Welch, Past Chair DeChà Reid, THECB Rep Victoria Chen Dede Gonzales (TASFAA Rep.) Bridgette Ingram Cecelia Jones Melet Leafgreen Gaby Leon Scott Lapinski | Lynda McKendree Holly Nolan Shonna Norton Sal Ramirez Joseph Ruiz Joseph Sanchez Lisa Schoenbrun Tevian Sides Gilbert Zavala | Jackie Adler Rachel Joseph (Student Rep.) Thomas Ratliff |
| Agenda Item 1. Welcome, Introductions and Overview of Meeting | | Rachelè Garrett, Chair |
| Handout Provided: No | | Formal Decision/Action Required No |
| Agenda Item 2. Consideration of Approval of Minutes from the meeting held on December 8, | | Rachelè Garrett, Chair |
| Handout Provided: Yes | | Formal Decision/Action Required Yes – <i>minutes approved</i> |
| Summary: <ul style="list-style-type: none"> No corrections were identified. **See handout for agenda item 2 for more information. | | |
| Agenda Item 3. Presentation: Diversity 101 | | D. Ingram, Diversity Awareness Chair, Southwestern Association of Student Financial Aid Administrators |
| Handout Provided: No | | Formal Decision/Action Required No |
| Presentation Summary: | | |
| Agenda Item 4. Presentation: Fall 2021 Student Financial Wellness Survey | | Jeff Webster, Director of Research, and Carla Fletcher, Sr. Research Analyst, Trellis |
| Handout Provided: Yes | | Formal Decision/Action Required No |
| Presentation Summary: **See handout for agenda item 4 for more information. | | |
| Agenda Item 5. Update: Prior FAAC Business | | DeChà Reid, Senior Director, THECB |
| Handout Provided: No | | Formal Decision/Action Required No |
| <i>Standing Item</i> Update Summary: <ul style="list-style-type: none"> Regarding EFA for TXWORKS Internship Program, TXWORKS does not count as EFA. For more information about the TXWORKS Program, you can email Vanessa Malo at vanessa.malo@highered.texas.gov | | |
| Agenda Item 6. Update: External Relations | | John Wyatt, External Relations, THECB |
| Handout Provided: No | | Formal Decision/Action Required No |
| <i>Standing Item</i> Update Summary: <ul style="list-style-type: none"> The Legislature has been in session for two months. Committees have been appointed in both chambers. Higher Education will function as a subcommittee in the Senate with Senator Brandon Creighton as the chair. Representative John Kuempel is the chair for the House Higher Education Committee Major funding and policy items: <ul style="list-style-type: none"> Both chambers have introduced their first draft appropriation bills; introduced bills keep financial aid programs funding levels even with previous biennium. THECB has requested additional financial aid assistance through Texas Grant, TEOG and TEG to keep those grants at the same service level as the last biennium so the same percentage of students can be served through those programs. <ul style="list-style-type: none"> Senate Finance Committee & House Appropriations Committee meeting to discuss the budget proposals. | | |

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| <ul style="list-style-type: none"> ○ HB8- Legislation to enact the recommendations made by the Community College Finance Commission. <ul style="list-style-type: none"> ▪ Looking at how to fund community colleges & keep them affordable. ▪ Recommendation: an increase in TEOG funding so that the TEOG program could serve 70% of eligible students (currently only serves approx. 25-28% of eligible students). ▪ Funding for this was included and will only happen if legislation is passed. • Other bills to note: <ul style="list-style-type: none"> • SB34 and SB35- Texas Promise Grant bills (Sen. Zaffirini). • SB902- codify in statute Texas Leadership Scholar Programs (Sen. West) <ul style="list-style-type: none"> ○ THECB included \$25 mil in funding for the program in its legislative appropriations request. • HB 1192 & SB371 – TASSP – bills intended to provide flexibility around the number of required participation years in the ROTC program (Rep. Turner & Sens. Eckhardt & Campbell) | |
| Agenda Item 7. Update: THECB Financial Aid Strategic Priority | Charles Contero-Puls, Assistant |
| Handout Provided: No | Formal Decision/Action Required No |
| <i>Standing Item</i> Update Summary: The work is in the final stages of review & more updates are to come. | |
| Agenda Item 8. Update: TASFA Subcommittee | Bridgette Ingram, Subcommittee Chair; |
| Handout Provided: No | Formal Decision/Action Required No |
| <i>Standing Item</i> Update Summary: <ul style="list-style-type: none"> • TASFA Subcommittee will meet on 3/3/23. | |
| Agenda Item 9. Update: Data Collection Subcommittee | Dede Gonzales, Subcommittee Chair |
| Handout Provided: Yes | Formal Decision/Action Required No |
| <i>Standing Item</i> Update Summary: **See handout for agenda item 9 for more information | |
| Agenda Item 10. Update: Legislative Subcommittee | Subcommittee Chair |
| Handout Provided: N/A | Formal Decision/Action Required N/A |
| <i>Standing Item</i> Update Summary: <ul style="list-style-type: none"> • No updates to provide. | |
| Agenda Item 11. Update: Texas Association for State Financial Aid Administrators (TASFAA) | Dede Gonzales, TASFAA President |
| Handout Provided: No | Formal Decision/Action Required No |
| <i>Standing Item</i> Update Summary: <ul style="list-style-type: none"> • Board meeting to discuss strategic plan for the next three years. • Legislative Issues Committee drafted a letter (found on TASFAA website) to outline association’s legislative goals, sent to the Commissioner, the Senate Higher Education Subcommittee, the House Higher Education Committee, and several legislators who have filed financial aid-related bills. <ul style="list-style-type: none"> ○ Four Goals, three align state policies with federal policies. <ul style="list-style-type: none"> ▪ Satisfactory Academic Progress ▪ Selective Service ▪ Drug Offenses ▪ TEOG Matching • Regional Trainings are ongoing. | |

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| Agenda Item 12. Update: High School District | Lisa Schoenbrun, El Paso ISD; Shonna |
| Handout Provided: No | Formal Decision/Action Required No |
| <p><i>Standing Item</i></p> <p>Update Summary:</p> <ul style="list-style-type: none"> Concerned about the delay of the 2024-25 FAFSA. | |
| Agenda Item 13. Update: Office of Student Financial Aid Programs | DeChà Reid, Senior Director, THECB |
| Handout Provided: No | Formal Decision/Action Required No |
| <p><i>Standing Item</i></p> <p>Topics of Discussion:</p> <ol style="list-style-type: none"> Grant Application and Payment Portal (GAPP) New Staff Hires Released and Upcoming Announcements Upcoming and Past Deadline Dates <p>Grant Application and Payment Portal (GAPP)</p> <ul style="list-style-type: none"> GAPP is a modernized platform that will integrate 14 out of 20 of the financial aid programs which consist of grants, work-study, loan repayment, exemption, and scholarships. The system will allow institutions to approve user access, upload documents (e.g., program participation), request payments, monitor program spending, send communication directly to THECB staff, and submit authority to transfer requests. The goal is to go live with a few programs in Fall 2023. The proposed programs are: Work-study programs, Educational Aide, and Bilingual Education. More information and training will be released introducing the improved payment platform. <p>Financial Aid Personnel Activity</p> <ul style="list-style-type: none"> THECB has been busy with hiring and promoting internal staff. To date, we had: <ul style="list-style-type: none"> New Hires: 4 <ul style="list-style-type: none"> 1 Manager II for our Workforce Aid (Loan Repayment) team 1 Program Specialist III for our Institutional Aid (Operational) team 2 Customer Service Reps for our Student Aid (Loan Origination) team Vacancies: 2 <ul style="list-style-type: none"> 1 Programs Specialist III for our Institutional Aid (Operations) team 1 Customer Services Rep III for our Workforce (Loan Repayment) team <p>Released Memos</p> <ul style="list-style-type: none"> March 1, 2023 – Tuition Equalization Grant (TEG) FY2024 Award Amounts Memo [PDF] February 24, 2023 – 2022-23 (FY 2023) FORWARD Loan Program Guidelines Memo [PDF] February 22, 2023 – NEW LOAN PROGRAM: FORWARD Loan Program Memo [PDF] February 21, 2023 – Financial Aid Database (FAD) FY 2023 Update Memo [PDF] February 16, 2023 – Texas State Financial Aid FY 2024 OPT-IN/OPT-OUT Form Memo [PDF] February 2, 2023 – Texas Transfer Grant Program Spring 2023 Reimbursement Request Memo [PDF] January 26, 2023 – Financial Aid Database (FAD) Manual - FY 2023 (2022-23) Memo [PDF] January 25, 2023 – Good Neighbor Program FY 2024 (2023-24) Memo [PDF] January 19, 2023 – Toward EXcellence, Access, and Success (TEXAS) Grant and Texas Educational Opportunity Grant FY 2024 Award Amounts Memo [PDF] <p>Upcoming Memos</p> <ul style="list-style-type: none"> March 6, 2023 – FY 2023 Authority to Transfer [PDF] <p>Upcoming deadlines</p> <ul style="list-style-type: none"> March 3, 2023 – 2023-24 Texas State Financial Aid OPT-IN/OPT-OUT Form March 15, 2023 – FY2023 Good Neighbor Program Nominations [PDF] <p>Past Deadlines</p> <ul style="list-style-type: none"> February 28, 2023 – Spring 2023 Texas Transfer Grant Reimbursement Request <ul style="list-style-type: none"> As a reminder, the purpose of submitting your reimbursement data sooner is so the agency can assess the amount of spring funds available for reallocation to other schools that may need additional funding. | |

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| Agenda Item 14. Discussion Topic: Proposed Rules that Impact Financial Aid Programs | | DeChà Reid, Senior Director, THECB |
| Handout Provided: | | Formal Decision/Action Required |
| <i>These proposed rules will be adopted at our April Board Meeting.</i> | | |
| Proposed Rule(s) | Proposed Amendments | |
| 19 TAC §22.1 | In 22.1, the definition of "expected family contribution" is amended to reflect that the phrase refers to the applicable federal methodology. | |
| 19 TAC §§22.22 - 22.24, 22.28, 22.29 | In §22.22, two redundant definitions are repealed since the items are explained elsewhere in the subchapter. In §22.23, the timing of data submissions is clarified to ensure that allocation activities can occur in a timely manner. In §22.24(8), eligibility criteria are provided for exceptional TEG need. In §22.28, a clarifying reference to §22.4 is added. In §22.29, outdated language is removed, with appropriate clarifying language. Section 22.29(c) is also removed since the language is being proposed separately as a new §22.30. | |
| 19 TAC §22.30 | In 22.30, this new section will establish language currently in §22.29 as a separate rule for greater clarity. | |
| 19 TAC §22.49 | In 22.49 will implement new standards regarding the aggregate and annual loan limits. | |
| <p>Another proposed rule change that we are interested in getting feedback on would impact community colleges. Before we submit a request for a proposed rule change, we were hoping to get your input on whether you think the Coordinating Board should consider calculating two maximum TEOG amounts: an in-district amount and an out-of-district amount.</p> <p>The statute does not distinguish between in-district vs. out-district: TEC 56.407(a) indicates, "the amount of a grant under this subchapter for a student enrolled full-time at an eligible institution is the amount determined by the coordinating board as the average statewide amount of tuition and required fees that a resident student enrolled full-time in an associate degree or certificate program would be charged for that semester or term at eligible institutions." This can be interpreted as both in-district and out-of-district students are residents.</p> <p>However, our rule for calculating the maximum grant is based on in-district resident tuition and fees. (19 TAC §22.261(b)(2)). We understand that this can lead to some funding challenges at some community colleges, since out-of-district resident tuition and fees are usually several thousand dollars more than in-district resident tuition and fees. TEOG requires institutions to ensure that any TEOG recipient is receiving grant funds to cover tuition and fees. Many community colleges do not have significant institutional funds to draw from to cover the difference between the maximum TEOG and a student's out-of-district resident tuition and fees, and thus they may avoid offering TEOG to out-of-district students.</p> <p>We are proposing to re-write our rule to calculate both an in-district maximum and an out-of-district maximum to provide institutions with greater flexibility in the utilization of their funding to support the goals of the TEOG program. What are your thoughts on this proposal?</p> <p><i>If the TEOG appropriation increases that have been proposed by the Community College Finance Commission are approved, having an out-of-district maximum may be essential to ensuring institutions can execute the increased funding level.</i></p> | | |
| Agenda Item 15. Discussion Topic: 2024-25 FAFSA Delay | | Rachelè Garrett, Chair |
| Handout Provided: No | | Formal Decision/Action Required No |
| <p>Discussion Summary:</p> <ul style="list-style-type: none"> Discussion on how institutions are approaching marketing & high school outreach related to the delay. | | |
| Agenda Item 16. Feedback for Future Meetings | | Rachelè Garrett, Chair |

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| Handout Provided: No | Formal Decision/Action Required No |
| Feedback Summary: <ul style="list-style-type: none"> • Legislative recap on various Financial Aid changes that may be occurring during the legislative session. • Further 2024-25 FAFSA discussion to see if DoE has provided any guidance by June 1. | |
| Agenda Item 17. Adjournment | Rachelè Garrett, Chair |
| Handout Provided: No | Formal Decision/Action Required No |
| Summary: <ul style="list-style-type: none"> • Motion to adjourn made by Denise Welch • Motion to adjourn seconded <p style="color: red;">Meeting adjourned at 12:35 p.m.</p> | |
| Reminder. Announcement: Expense Reports | Rachelè Garrett, Chair |