

Financial Aid Advisory Committee
Meeting Notes
Sept. 2, 2021

Committee Members in Attendance Via <u>Virtual</u> Meeting Connection		Committee Members Absent
Ed Kerestly (Chair) Denise Welch (Vice Chair) Robert Merino (Past Chair) DeChá Reid (THECB Representative) Taryn Anderson Dr. Ben Bholan Johanna Boley Victoria Chen Rachele Garrett Dede Gonzales Heidi Granger Bridgette Ingram	Tam Nguyen Holly Nolan Shonna Norton Steven Peterson Kelly Steelman Joy Thomas Arnold Trejo Jase Kugiyi (Student Rep)	Thomas Ratcliff Dr. Formon Thompson
Agenda Item 1. Welcome, Introductions and Overview of Meeting		Ed Kerestly, Chair
Handout Provided: No		Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> Due to nature of virtual meetings, roll call of members ensured a quorum of committee members. 		
Agenda Item 2. Consideration of Approval of Minutes from the meeting held on June 3, 2021		Ed Kerestly
Handout Provided: Yes		Formal Decision/Action Required Minutes approved
Presentation Summary: <ul style="list-style-type: none"> No corrections were identified. <p style="text-align: center;">**See handout for agenda item 2 for more information.</p>		
Agenda Item 3. Update: Prior FAAC Business		DeChá Reid Senior Director
Handout Provided: No		Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> Update on Prior Business is: FAAC rules that were proposed in the Texas Register on May 14 received no comments and were approved by the Board on July 22. The proposed rules will go into effect on September 10. In addition to extending the FAAC for another four-year period (new abolishment date is October 31, 2025), the rules implement the recommendations of the FAAC: Changes the start of the committee members terms to the first meeting of the state fiscal year (e.g., the September meeting) Reduces the number of student representatives from two to one. Adds a representative from the non-profit sector with responsibility for advising students regarding financial aid Recommended slate of nominations for Board approval: <p style="text-align: center;">Recommended new Financial Aid Advisory Committee member:</p> <p>Jackie Adler Executive Director of Financial Aid Texas State Technical College (Term ending 2024)</p> <p>Cecelia Jones Director of Financial Aid Jarvis Christian College (Term ending 2024)</p> <p>Melet Leafgreen Director of Financial Aid University of Texas- Southwestern Medical Center (Term ending 2024)</p> <p>Sal Ramirez College and Career Readiness Coordinator El Paso ISD/Transmountain Early College High School (Term ending 2024)</p> <p>Joseph Ruiz Director of Financial Aid Del Mar College</p>		

<p>(Term ending 2023, to serve the remainder of unexpired term due to Johanna Boley retiring.)</p> <p>Tevian Sides Director of Financial Aid Western Texas College (Term ending 2024)</p> <p>Gilbert Zavala Vice President Austin Chamber of Commerce (Term ending 2024)</p> <p>Robert Merino President-Elect TASFAA (Nominated for a one-year term as the TASFAA representative.)</p>	
Agenda Item 4. Presentation: "Hidden Bias of in Professional Judgement"	Presenters, Daniel Barkowitz and Michael Birchett
Handout Provided: Yes	Formal Decision/Action Required N/A
<p>Update Summary:</p> <ul style="list-style-type: none"> • Presentation on how FAA's approach professional judgment. <p style="text-align: center;">**See handout for agenda item 4 for more information.</p>	
Agenda Item 5. Presentation: TEXAS Grant Annual Report	Andrea "Andy" Thomas, SFAP Asst. Dir. Date Management and Analysis
Handout Provided: Yes	Formal Decision/Action Required N/A
<p>Update Summary:</p> <ul style="list-style-type: none"> • Presentation on TEXAS Grant report that will go to the Board for approval. • Follow-up questions from the Committee: <ul style="list-style-type: none"> ○ What is the unmet need for the programs? ○ Look at the recommended dollar amount for TEXAS Grant <p style="text-align: center;">**See handout for agenda item 5 for more information.</p>	
Agenda Item 6. Update: External Relations	John Wyatt
Handout Provided: No	Formal Decision/Action Required N/A
<p>Update Summary:</p> <p>Additional \$94.6 million of GEER funds distributed to the agency. Listed the breakdown and divisions that were administering the funds:</p> <ul style="list-style-type: none"> • Institutional Capacity Grants will be handled by Workforce Education Division and will be available to public institutions to complete a Request For Information (RFI). • Texas Reskilling Support Fun Grant 2.0 will be handled by Workforce Education Division and will be available to public institutions to complete a Request For Information (RFI). More information will be provided when these funds are available to request. • Financial Aid Pilot Programs <ul style="list-style-type: none"> ○ Texas Leadership Scholars Program will be handled by our Academic and Health Affairs Division. More information will be provided when these funds are available to request. ○ Texas Transfer Grants will be handled by the Student Financial Aid Programs and will be available to public institutions. More information will be provided when these funds are available to request. • Student Success & Equity Initiatives will be handled by College, Readiness and Success Division. These funds are earmarked for the agency to continue to provide resources and tools for students. • Student Engagement and Educator Training will be handled by College, Readiness and Success Division. These funds are earmarked for the agency to continue to provide resources and tools for students. • GRADTX 2.0 Expansion will be handled by College, Readiness and Success Division. These funds are earmarked for the agency to continue to provide resources and tools for students. • DATA SECURITY AND ACCESSIBILITY will be handled by THECB's Information Support and Services Division. These funds are earmarked for the agency to continue our efforts with modernizing our data infrastructure. 	

Agenda Item 7. Joint Update: House Bill 3 (FAFSA/TASFA Graduation Requirement); House Bill 2140 (On-line TASFAA)	<p style="text-align: center;">Claudette Jenks Director, College Readiness and Success and Robert Merino, Subcommittee Chair</p>
Handout Provided: Yes	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • Online TASFA Progress <ul style="list-style-type: none"> ○ Development and programming are underway ○ Online TASFA is being incorporated into ApplyTexas Counselor Suite ○ Progress has been made on how files will be sent into institutions ○ Ongoing vendor discussions ○ TASFA Advisory Committee merged with FAAC TASFA to create adhoc work groups to continue guiding content, technical development, and testing ○ Establishing rules to administer the online TASFA ○ 2023-24 is expected on Oct. 1, 2022 <p style="text-align: center;">**See handout for agenda item 7 for more information.</p>	
Agenda Item 8. Update: Data Collection Subcommittee	<p style="text-align: center;">Dede Gonzales, Subcommittee Chair</p>
Handout Provided: Yes	Formal Decision/Action Required N/A
Update Summary: <p>The Data Collection Subcommittee met in July 2021 and provided the following updates.</p> <ul style="list-style-type: none"> • Program Participation Agreement (PPA) <ul style="list-style-type: none"> ○ PPA can be signed by any authorized person from the institution. THECB will defer to the institution for this decision • FAD Modernization Project <ul style="list-style-type: none"> ○ First Phase is to have the FAD input files put into the cloud environment. Scheduled to release at the end of October 2021 • Updates on two statutes: <ul style="list-style-type: none"> ○ Drug Conviction for State Aid ○ Financial Aid and Child Support <p style="text-align: center;">**See handout for agenda item 8 for more information.</p>	
Agenda Item 9. Update: Legislative Subcommittee	<p style="text-align: center;">Arnold Trejo, Subcommittee Chair</p>
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • Discussion with TASFAA Board to collaborate with Legislative issues. Have a representative of the FAAC committee on TASFAA to bring information for the FAAC meetings. 	

Agenda Item 10. Update: TASFAA Recommendations and Feedback	Taryn Anderson, TASFAA
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <p>Updates to the recommendations from the previous FAAC meeting held on June 3, 2021:</p> <ul style="list-style-type: none"> • TASFFA provided COVID-19 resources and created a forum within their website pertaining to COVID-19. Any member of TASFAA can access the forms on the website. • TASFFA Conference Update: There will be COVID-19 Emergency related sessions provided. • Robert Merino will be TASFFA President beginning Nov. 1, 2021 	
Agenda Item 11. Update: School District Recommendations and Feedback	Ben Bholan, Arlington ISD and Shonna Norton, Wichita Falls ISD
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • No recommendations or feedback. Questions and concerns were answered in the previous agenda items. 	
Agenda Item 12. Discussion: Program Participation Agreement (PPA)	DeChà Reid, Senior Director
Handout Provided: No	Formal Decision/Action Required N/A
Discussion Summary: <ul style="list-style-type: none"> • All PPA's have been received from all institution types. • The PPA fields on the form need further clarification and the instructions. • The PPA will expire Aug. 2023 and changes to some of the items will be addressed on the next PPA cycle. 	
Agenda Item 13. Discussion: Verification and Controlled Substance for State Financial Aid Program	DeChà Reid, Senior Director
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • Selective Service and Controlled Substance State Requirements <ul style="list-style-type: none"> ○ On June 11, 2021 the Department of Education released a Dear Colleague Letter (DCL ID: GEN-21-04) addressing early implementation of two of the FAFSA Simplification Act's eligibility requirements removals: Selective Service and Drug Conviction. ○ In the most recent 87th Texas Legislative session, no changes were made to remove or modify the Selective Service Status requirement under Texas Education Code (TEC), Section 51.9095 or the conviction of a felony or an offense of a controlled substance requirement included in the Toward EXcellence, Access, and Success (TEXAS) Grant)TEC, 56.304(b) and 56.305(b) and the Texas Educational Opportunity Grant (TEOG) (TEC), 56,404(b) and 56.405(b) programs and thus these two requirements to receive state financial aid remain in effect. ○ SFAP is currently reviewing the related requirements in the Texas Administrative Code. Institutions should continue to use current practices to meet state financial aid requirements until further guidance is provided. Looking to provide the guidance this month on how the state financial aid process is impacted. • Verification Changes for 2021-22 <ul style="list-style-type: none"> ○ On July 13, 2021 the Department of Education released a Dear Colleague Letter (CDL ID: Gen-21-05) which announced changes to 2021-22 Verification Requirements. These changes were made to provide relief to students and institutions who have faced various challenges because of the ongoing national emergency. ○ Institutions may choose to apply for this federal guidance to the state financial aid programs if a valid estimated family contribution (EFC) can be confirmed for calculating financial need for state awarding purposes. ○ For TASFA students, institutions have discretion to select students for verification according to consistently applied institutional policies. If a process is in place to calculate a valid EFC without verifying, institutions may continue to use that process. 	

Agenda Item 14. Discussion: FAFSA Simplification: Student Aid Index	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: Input from Committee members on Student Aid Index Concerns: <ul style="list-style-type: none"> ○ Will this make a drastic difference to Pell eligible students? ○ Families will have to report the net value of any business or farm they own if they didn't qualify for the simplified formula 	
Agenda Item 15. Discussion: FAAC Contributions	Ed Kerestly, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: FAAC supports the extension of abolishment date and modification to rules that help support the FAAC. This allows recommendations to be included in the annual report. (every four years, next discussion to occur 2024).	
Agenda Item 16 Update: Office of Student Financial Aid Programs	DeChá Reid, Senior Director
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> • SFAP Accomplishments since the last FAAC meeting <ul style="list-style-type: none"> ○ A new repayment option for CAL loans became effective July 1. The Low Payment Forbearance plan allows for payments to be temporarily reduced for up to six months due to temporary financial hardship. The reduced payment is based on the borrower's standard monthly payment amount and cannot be less than half of the standard payment amount or the amount of monthly interest accrual. Major benefit of this plan is that use of the repayment option does not count against a borrower's maximum repayment term. ○ Interest rate changes for federal loans and CAL variable rate loans went into effect July 1, with solicitation close date of August 26. Submitted bids will be evaluated during the month of September. ○ Released all FY 2022 program allocations ○ Published FY 2022 Education Aide Exemption (EAE) Program application, FAQs, and Funds Request Form ○ Published FY 2022 Bilingual Education Program guidelines and Funds Request Form ○ Update TEG Program Guidelines with new tuition differential totals for FY 2022 ○ Released the Comprehensive Program Guidelines ○ Transitioned schools from MOU to PPA • Deadline Extended: Texas Armed Services Scholarship Program <ul style="list-style-type: none"> ○ The Texas Higher Education Coordinating Board has extended the deadline for legislators to submit nominations to September 30, 2021. As a result of this extension, the deadline for the institutions financial aid office to complete a TASSP application for nominated recipients has also been extended to November 5, 2021. • Funds Request Process <ul style="list-style-type: none"> ○ Grant Programs <ul style="list-style-type: none"> ▪ Institutions can begin submitting funds request for FY 2022 for the three state grant programs which include Toward Excellence, Access and Success (TEXAS) Grant, Texas Educational Opportunity Grant (TEOG) and Tuition Equalization Grant (TEG). The additional funding (Strategy B.1.10) that was communicated in the final allocations for each program are being added in the grant payment portal in the coming months to reflect the full allocation amount ○ Special Programs <ul style="list-style-type: none"> ▪ Institutions can begin submitting funds request for FY 2022 for the Educational Aide Exemption (EAE) and the Bilingual Education Program by submitting the applicable PDF fillable form available on the Student Financial Aid Programs webpage under Program Resources. ○ Work-Study Programs <ul style="list-style-type: none"> ▪ Institutions participating in Texas College Work-Study (TCWS) or Work-Study Student Mentorship Program (WSMP) will receive FY 2022 funds as a lump-sum payment. Note: all requests and payments will be processed by Financial Aid Services after the first day of the new fiscal year, Sept. 1, 2021. • College Access Loan (CAL) and Texas Armed Services Scholarship Program (TASSP) Processing 	

- Starting September 2021, all CAL applications that re “incomplete” after 60 days in the HelmNet portal will be deactivated. This process will ensure that the HelmNet system is current with applications that are moving through the funding process.
- All FY 2022 TASSP disbursements will be processed by the THECB after the first day of the new fiscal year, Sept. 1, 2021.
- **Institutional Calendar**
 - The Fall 2021 Calendar edition (Sept. – Dec. 2021) is now available on the SFAP webpage under Stay Connected → Calendar of Program Deadlines
- **HHloans Online Fillable Forms**
 - To streamline and modernize the borrower experience, various forms on the hhloans.com website were updated to be fillable and include the option to electronically sign before submitting them to the THECB. The following fillable forms are now available.
 - Borrower Repayment Options Form
 - General Postponement Request Form
 - TASSP Annual Certification Form
 - BOT loan Application for Forgiveness
 - Authorization for Release of Information Form
- **Exemption and Waiver Program Guidelines**
 - The following resources were published for institutions to reference on the Student Financial Aid Programs webpage under the Exemptions and Waivers webpage for the two exemption and waiver programs listed below.
 - Children of Professional Nursing Program Faculty and Staff – Fact Sheet
 - Competitive Scholarship Waiver – Fact Sheet
- **2022-23 Texas Application for State Financial Aid (TASFA) – Institutional Use Only**
 - The 2022-23 Texas Application for State Financial Aid (TASFA) is enclosed for institutional use only. While changes are not anticipated on this current version, institutions should avoid releasing to students in the event modifications are needed prior to the official publication on Oct. 1, 2021.
 - As a reminder, this early release gives institutions time to:
 - Customize the TASFA and prepare for posting online for the Oct. 1 release to students
 - Provide the TASFA to vendors for software updates
 - The following minor changes were made to the 2022-23 TASFA based on recommendations by the Financial Aid Advisory Committee’s TASFA Subcommittee and the Texas Higher Education Coordinating Board (THECB):
 - Annual updates to years and dates
 - Annual updates to tax and income Internal Revenue Service (IRS) references
 - Selective Service Updates:
 - Adding option for females to select “N/A”
 - Updating banner color for visibility
 - The THECB will not post the English and Spanish TASFA online for students until Oct. 1, 2021. At that time, both language versions will be available to students and their families on the College for All Texas and the Student Financial Aid Programs webpages.

Agenda Item 17 Update: Recognition of members stepping down	Ed Kerestly, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> ● Chair stated four members whose term will end and recognition of their contribution to the FAAC: <ul style="list-style-type: none"> ○ Kelly Steelman ○ Tam Nguyen ○ Heidi Granger ○ Taryn Anderson 	
Agenda Item 18. Transition of Leadership	Ed Kerestly, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none"> ● Current Chair passed the “torch” over to new Chair: Denise Welch and offered some guidance on how to be successful in the role. 	
Agenda Item 19. Discussion: Topics for Future Meetings	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none"> ● No items identified 	

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Agenda Item 20. Adjournment	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none">• Adjourned at 12:39pm (CST)	