FINANCIAL AID ADVISORY COMMITTEE (FAAC)

Handouts for the September 3, 2020, meeting:

Financial Aid Advisory Committee Meeting Agenda

Name of Committee: Financial Aid Advisory
Committee Date of Meeting: September 3, 2020
Time and duration of Meeting: 9:00 a.m.
Location: Virtual Meeting
                             Click for Meeting Materials

Agenda

1. Welcome and Overview of Meeting – Robert Merino, Chair
2. Introductions: New Student Representative - Robert Merino
3. Acknowledgment: Members finishing their terms – Robert Merino
4. Consideration of Approval of Minutes from the meeting held on March 5, 2020 – Robert Merino
5. Update: Prior Business – Charles Contéro-Puls, Deputy Assistant Commissioner
6. Update: External Relations – John Wyatt, Senior Director, External Relations
7. Joint Update: HB3 and on-line TASFA Progress and TASFA Sub-committee – Claudette Jenks, Director, College Readiness and Success, and Robert Merino, TASFA sub-committee Chair
8. Discussion: TASFAA Recommendations – Lyn Kinyon, TASFAA President
9. Discussion: School District Recommendations – Ben Bholan, Arlington ISD, and Shonna Norton, Wichita Falls ISD
10. Update: Data Collection Subcommittee – Samantha Stalnaker, sub-committee Chair
11. Selection of Data Collection Subcommittee Chair – Samantha Stalnaker, sub-committee Chair
12. Update: Legislative Recommendation Subcommittee – Shannon Crossland, sub-committee Chair
13. Update: Slate of FAAC nominees – Charles Contéro-Puls
14. Discussion: Student Representative from 2-year section – Charles Contéro-Puls
15. Update: Office of SFAP – Charles Contéro-Puls
16. Transition of Leadership – Robert Merino
17. Adjournment – Ed Kerestley

Governor Abbott's office approved a request by the Office of the Attorney General to temporarily suspend a limited number of open meeting laws in response to the Coronavirus (COVID-19) disaster. This action will allow governmental bodies to conduct meetings by telephone or video conference to advance the public health goal of limiting face-to-face meetings (also called "social distancing") to slow the spread of the Coronavirus (COVID-19). All persons requesting to address the Committee regarding an item on the agenda should do so in writing at least 24 hours before the start of the meeting at Michelle.Soto@HigherEd.Texas.gov. A toll-free telephone number, free-of-charge video conference link, or other means will be provided by which to do so.

Committee Members in Attendance		Committee Members Absent
Robert Merino (Chair) Ed Kerestly (Vice Chair) Charles Contéro-Puls Tacey Anderson Dr. Ben Bholan Shannon Crossland Rachele Garrett Lyn Kinyon Thomas Ratliff	Joy Thomas Denise Welch Brent Williford Via Teleconference: Karla Flores Heidi Granger Tam Nguyen Formon Thompson	Paul Galyean Diane Todd Sprague (Past Chair) Samantha Stalnaker Christine Stuart-Carruthers Brent Williford Marilyn Abedrabbo (Student Rep) Johnathan Cereceres (Student Rep)

Agenda Item A. Welcome, Introductions, and Overview of Meeting	Robert Merino, Chair
Handout Provided: No	Formal Decision/Action Required N/A

Agenda Item B. Consideration of Approval of Minutes from meetings held November 21, 2019	Robert Merino, Chair
Handout Provided: Yes	Formal Decision/Action Required Minutes approved

Action Summary:
- No corrections were identified
- Motion to approve minutes by Denise Welch; motion was seconded by Shannon Crossland; all members voted in favor

Agenda Item C. Recognition of Outgoing Student Representatives	Charles Contéro-Puls, Deputy Assistant Commissioner
Handout Provided: No	Formal Decision/Action Required N/A

Presentation Summary:
- The committee recognized the two students with terms ending

Agenda Item D. Update: Prior FAAC Business	Charles Contéro-Puls, Deputy Assistant Commissioner
Handout Provided: No	Formal Decision/Action Required N/A

Action Summary:
- All prior business has been included in the day's agenda

Agenda Item E. Presentation: Senate Bill 1474 and Its Impact on New Student Loan Options	Mr. Ken Martin, Assistant Commissioner/CFO and Debra Urias, Vice President, Brazos Higher Education Servicing Corporation
Handout Provided: Yes	Formal Decision/Action Required N/A

Presentation Summary:
- SB 1474 enables other providers to pursue student and parent lending products
- Deborah Urias and Justin Green from Brazos Higher Education Servicing Corporation provided details on the parent loan product Brazos has developed based on SB 1474.

Agenda Item F. Presentation: Department of Education Experimental Sites Initiative; Second Chance Pell *(Via Skype)*	Felipe Leal, Director of Financial Aid, Lee College, and Cynthia Martinez, Financial Aid Senior Advisor, Southwest Texas Junior College
Handout Provided: Yes	Formal Decision/Action Required N/A

Presentation Summary:
- Cynthia Martinez provided an overview of how the Second Chance Pell program has been implemented by Southwest Texas Junior College at the Dolph Briscoe Correctional Institution.

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Agenda Item G. Presentation: Department of Education Experimental Sites Initiative; Pell Grants for Students in Dual Enrollment	Don Hilton, Director of Financial Aid, Ranger College
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Presentation Summary:
- Don Hilton provided an overview of how the Pell Grant program for Dual Credit students has been implemented by Ranger College

Action Summary:
- Ed Kerestly raised the point that ongoing interest in expanding and strengthening dual credit enrollment in the state may result in legislative interest in this program and how it fits into the state's overall goals, which the agency may wish to follow closely.

Agenda Item H. Discussion: House Bill 3 (FAFSA/TASFA Graduation Requirement) and House Bill 2140 (Online TASFAA)	Claudette Jenks, Director, College Readiness and Success
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Presentation Summary:
- Claudette Jenks provided an overview of the activities that are occurring at TEA and THECB regarding the FAFSA/TASFA high school graduation requirement in HB 3 and the online TASFA requirement in HB

Action Summary:
- Lyn Kinyon raised the point regarding associated costs and questioned whether students would be charged for filing a TASFA. Claudette clarified that the advisory committee would provide guidance on how development and maintenance costs would most appropriately be addressed.
- Ed Kerestly raised the point that involving financial aid software providers early in the planning process is critical. Claudette clarified that the advisory committee would solicit information from vendors/stakeholders as part of their discussions.
- Charles Contéro-Puls raised the point of the difference between the timeliness of receiving FAFSA data and needing to understand why institutions receive data much faster than the agency does.

Agenda Item I. Discussion: Proposed Update to Texas Administrative Code Related to TEXAS Grants	Charles Contéro-Puls, Deputy Assistant Commissioner
Handout Provided: Yes	**Formal Decision/Action Required** Proposed rules will be posted in the *Texas Register*

Presentation Summary:
- Charles Contéro-Puls reviewed proposed updates to the Texas Administrative Code regarding TEXAS Grant prior to posting the proposed rules in the *Texas Register*.

Action Summary:
- Committee members confirmed that the term "award" is being replaced by "grant" and "offer" in published materials. As changes are proposed to the administrative code in the future, this will be integrated into proposed rules.
- Committee members did not raise any concerns regarding the proposed rules as they exist within statutory limitations.

Agenda Item J. Discussion: Proposed Update to Texas Administrative Code Related to Adding a Definition of Academic Year	Charles Contéro-Puls, Deputy Assistant Commissioner
Handout Provided: Yes	**Formal Decision/Action Required** Proposed rules will be posted in the *Texas Register*

Presentation Summary:
- Charles Contéro-Puls reviewed a proposed update to the Texas Administrative Code regarding the definition of "academic year," prior to posting the proposed rule in the *Texas Register*.

Action Summary:
- Committee members agreed that aligning the state definition with the federal definition would be helpful.
- Shannon Crossland suggested a change in wording that will be incorporated into the proposed rule before it is published in the *Texas Register*.

Agenda Item K. Discussion: Proposed Update to Texas Administrative Code Related to Repealing the Grant Pro-Ration Requirements	Charles Contéro-Puls, Deputy Assistant Commissioner
Handout Provided: Yes	**Formal Decision/Action Required** Proposed rules will be posted in the *Texas Register*

Presentation Summary:
- Charles Contéro-Puls reviewed a proposed update to the Texas Administrative Code regarding the elimination of grant pro-ration in TEXAS Grant, TEOG, and TEG, prior to posting in the *Texas Register*.

Action Summary:
- Committee members agreed that elimination of grant pro-ration would provide institutions with greater flexibility to make determinations as to what best suits the needs of their student population.

Agenda Item L. Discussion: Proposed Convening of a Negotiated Rule-Making Committee on Texas College Work-Study	Charles Contéro-Puls Deputy Assistant Commissioner
Handout Provided: Yes	**Formal Decision/Action Required** Charles Contéro-Puls will begin agency discussions on launching negotiated rulemaking

Presentation Summary:
- Charles Contéro-Puls reviewed a proposal to convene a negotiated rule-making committee focused on the allocation process for the Texas Work-Study Program with a focus on greater flexibility for institutions. He also reviewed the plan to shift the Texas Work-Study Program disbursement process from a single disbursement at the start of the year to disbursements on an as-needed basis.

Action Summary:
- Committee members agreed that a negotiated rule-making process would be a good use of participants time.

Agenda Item M. Update: TASFA Sub-Committee	Robert Merino Sub-Committee Chair
Handout Provided: No	**Formal Decision/Action Required** N/A

Presentation Summary:
- Robert Merino provided an overview of the TASFA sub-committee discussions which have occurred since the last FAAC meeting.
- Items being considered: including AGI on the TASFA; considering September 1 release date for institutions and October 1 for students; additional institutional surveys to gather more feedback

Agenda Item N. Update: Data Collection Sub-Committee	Samantha Stalnaker, Sub-Committee Chair
Handout Provided: No	**Formal Decision/Action Required** N/A

Presentation Summary:
- Samantha Stalnaker provided an overview of the Data Collection sub-committee discussions which have occurred since the last FAAC meeting.
- Four agenda items at the last subcommittee meeting
  - Update on grants payments system – two enhancements –email notifications for fund requests, return of funds and payment; additional role for access – processing access or review access (viewing only)
  - FAD Data Review Findings – FAD edits that weren't working as intended have been fixed, and additional edits have been added to address data inconsistencies
  - TCWS funds request form – Subcommittee provided input on potential approaches to institutional fund requests that better align with when institutions expend the funds.
  - Updates: Subcommittee provided feedback on upcoming SFAP activities and challenges being reviewed

Action Summary:
- In response to a question about how coronavirus -related events might impact student eligibility, Charles Contéro-Puls indicated that the agency is meeting to discuss efforts and management procedures in relation to the coronavirus.
- Charles Contéro-Puls raised the question of how Federal Work-Study Funds are dawn down through the federal system to better understand how the state work-study approach might align with the federal approach. He will review the federal approach in more detail.

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Agenda Item O. Update: Legislative Recommendations Subcommittee	Shannon Crossland, Sub-Committee Chair
Handout Provided: Yes	**Formal Decision/Action Required** The subcommittee will update their report to incorporate the items proposed by FAAC members.

Presentation Summary:
- Shannon Crossland presented the recommendations of the Legislative Recommendations sub-committee.

Action Summary:
- Kelly Steelman proposed adding the state's "debt letter" to the list of discussion items for the sub-committee to review in considering federal and state alignment.
- Ed Kerestly proposed having the subcommittee address whether the financial implications of the expanded eligibility based on aligning the state SAP guidelines with federal guidelines would influence the subcommittee's recommendation.
- Charles Contéro-Puls proposed having the subcommittee address whether the lack of legislative appropriations to fund an increase to the Target Award would influence the subcommittee's recommendation.
- Charles Contéro-Puls proposed (during Agenda Item S) having the subcommittee indicate more detail on what they would be looking for in a data-informed study on the Priority Deadline.

Agenda Item P. Update: TASFAA Recommendations and Feedback	Lyn Kinyon, TASFAA President
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Presentation Summary:
- Lyn Kinyon presented an update on recent TASFAA activities and upcoming events.

Agenda Item Q. Update: School District Recommendations and Feedback	Ben Bholan, Arlington ISD
Handout Provided: No	**Formal Decision/Action Required** N/A

Presentation Summary:
- Ben Bholan provided a School District perspective based on the new state requirements regarding FAFSA completion.
- School Districts are encouraged by the new requirements, though there are concerns as to how the 100% expectations will be implemented given the challenges that may prevent families from following through on the requirement.

Agenda Item R. Discussion: Interaction of Priorities Impacting State Financial Aid	Charles Contéro-Puls Deputy Assistant Commissioner
Handout Provided: Yes	**Formal Decision/Action Required** Program Guidelines will be updated to provide clarity on the interaction of the various priorities

Presentation Summary:
- Charles Contéro-Puls presented the agency's interpretation of how the various TEXAS grant priorities interact to gather committee feedback on how the agency's interpretation aligns with institutional practice.

Action Summary:
- Committee members indicated that the agency's interpretation largely aligns with institutional practice.

Agenda Item S. Discussion: Priority Deadline	Charles Contéro-Puls Deputy Assistant Commissioner
Handout Provided: Yes	**Formal Decision/Action Required** Similar charts will be assembled looking at all eligible students

Presentation Summary:
- Charles Contéro-Puls presented data that had been assembled regarding TEXAS Grant, TEOG, and TEG recipients in relation to FAFSA filing date and demographics.

Agenda Item T. FAAC Nomination Process	Charles Contéro-Puls Deputy Assistant Commissioner
Handout Provided: Yes	**Formal Decision/Action Required** The nomination timeline will be revised to allow new members to start their term in September

Presentation Summary:
- Charles Contéro-Puls presented the process for collecting nominations for the FAAC. He also raised the question of whether the committee thought the start of the term dates should be shifted from December, back to September.

Action Summary:
- Committee members supported the proposed change to have terms start in September and adjusting the nomination timeline accordingly.
- Lyn Kinyon raised the point that the TASFAA President has typically been the TASFAA Representative on the FAAC, but the individual's term as TASFAA President does not start until November 1. Charles will review this with TASFAA to determine how best to accommodate this.

Agenda Item U. Update: Office of Student Financial Aid Programs	Charles Contéro-Puls Deputy Assistant Commissioner
Handout Provided: No	**Formal Decision/Action Required** N/A

Presentation Summary:
- Charles Contéro-Puls presented an update of recent activities in the Office of Student Financial Aid Programs
- Recent updates to our resources (training materials, guidelines, memos, etc.)
  - Institutions Calendar – Spring 2020
  - Consanguinity or Affinity Scholarship Statement
  - Six new exemption guidelines
  - Announcements
    - State Grant Award Amounts – FY 2021
    - Tuition Set-Asides – Uniform Standards
    - FAD Cycle One opened Feb 21
- Upcoming items that will occur before the June FAAC meeting
  - Training activities
    - TASFAA Regional Trainings
    - FAS Webcast – Mar. 10
  - Deadlines (processing, reports, etc.)
    - Opt In/Out Survey (all institutions) - deadline Feb. 28
      - Texas College Work-Study (TCWS)
      - Work-Study Student Mentorship (WSMP)
      - Educational Aide Exemption (EAE)
      - Tuition Equalization Grant (TEG)
    - Good Neighbor Recommendations – deadline Mar. 15
- Recent SFAP Accomplishments
  - Grant Payment Platform Enhancements (discussed in Agenda Item N)
  - Loan origination automation was implemented Dec 17 to speed the approval of borrower applications so that institutions can certify loans more quickly
  - Enhanced due diligence efforts have been implemented to provide more active outreach to support borrowers who may be more likely to become delinquent

Agenda Item V. Discussion: Topics for Future Meetings	Robert Merino, Chair
Handout Provided: No	**Formal Decision/Action Required** Members will e-mail Robert with recommended meeting topics

Presentation Summary:
- Robert Merino requested input from the committee on future meeting topics

Action Summary:
- Topic suggestion: Are there opportunities to expand financial literacy efforts for parents and high school students given the new FAFSA graduation requirement

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Agenda Item W. Adjournment	Robert Merino, Chair
Handout Provided: No	**Formal Decision/Action Required** Meeting Adjourned
- Next meeting June 4, 2020 - Be sure to send in your Attendance Form to Michelle, even if you attended on the phone - Shannon Crossland moved to adjourn; Thomas Ratliff seconded the motion.	

FY 19 FAFSA Filing Date for all Students Eligible for an Initial Grant, by Program

Sensitive

FY 19 FAFSA Filing Date for all Initial Grant Recipients, by Program

Legend: TEXAS Grant, TEOG, TEG
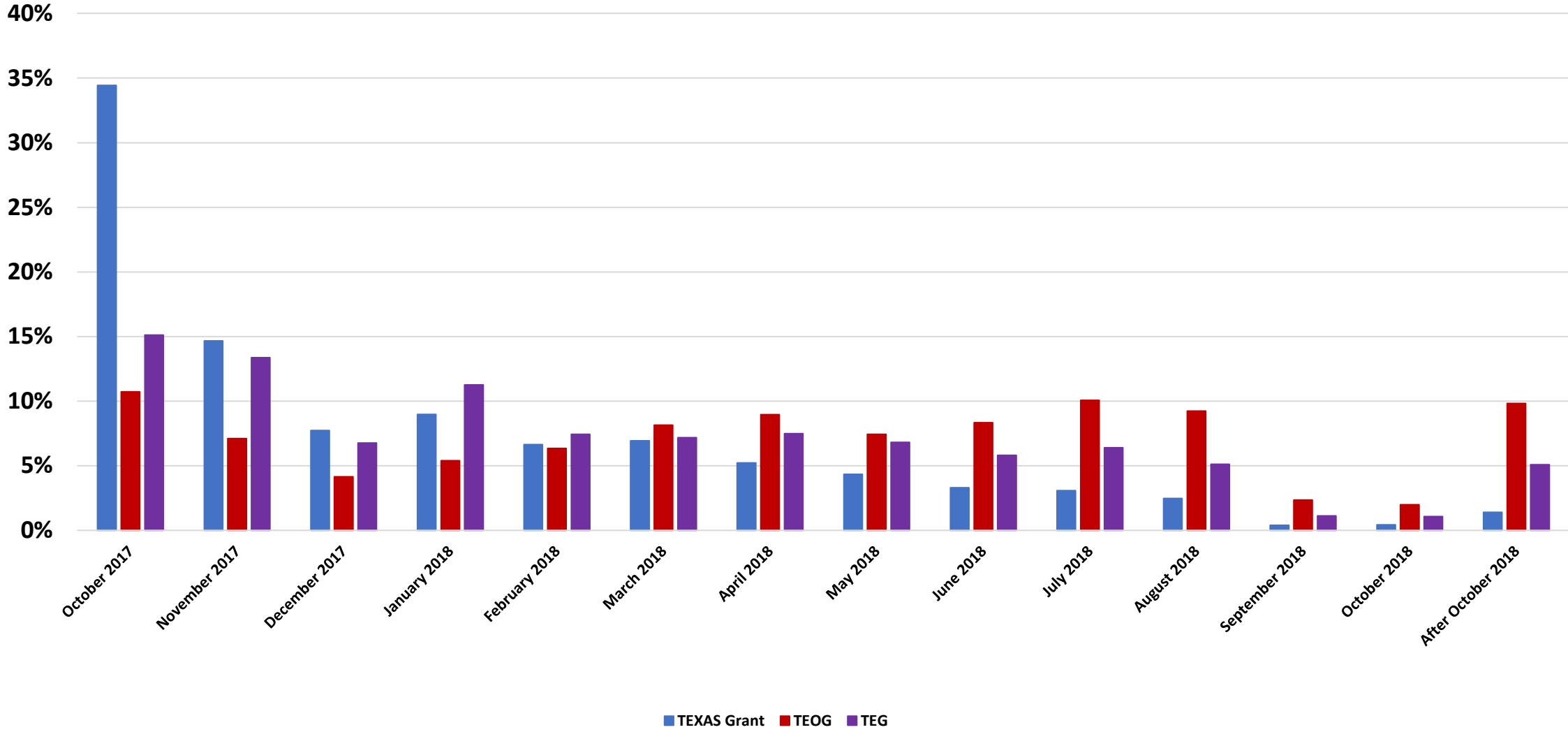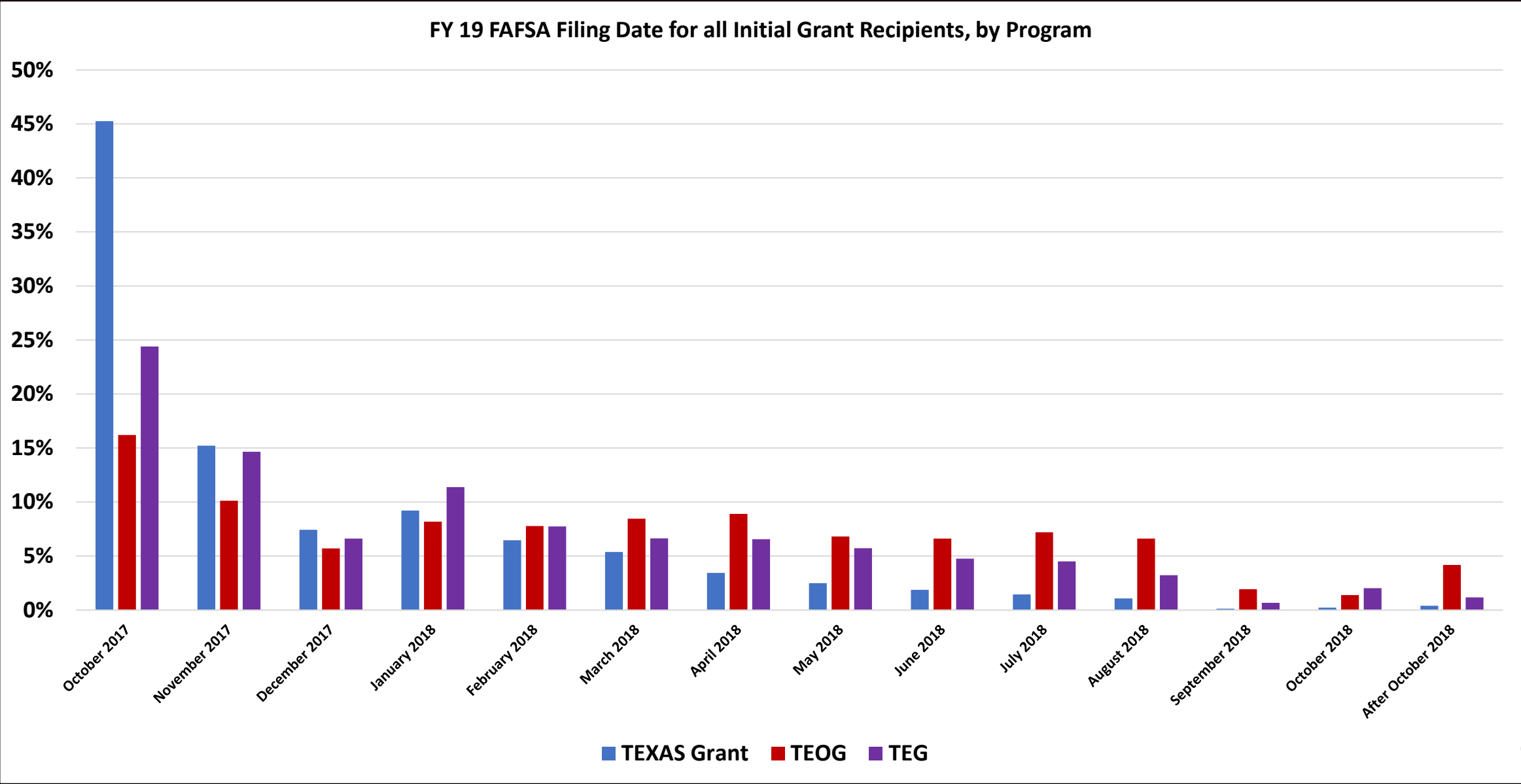
FY 19 FAFSA Filing Date for Students Eligible for an Initial TEXAS Grant, TEOG, or TEG, by Ethnicity

Legend: Asian, Black, Hispanic, White, Other

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Sensitive
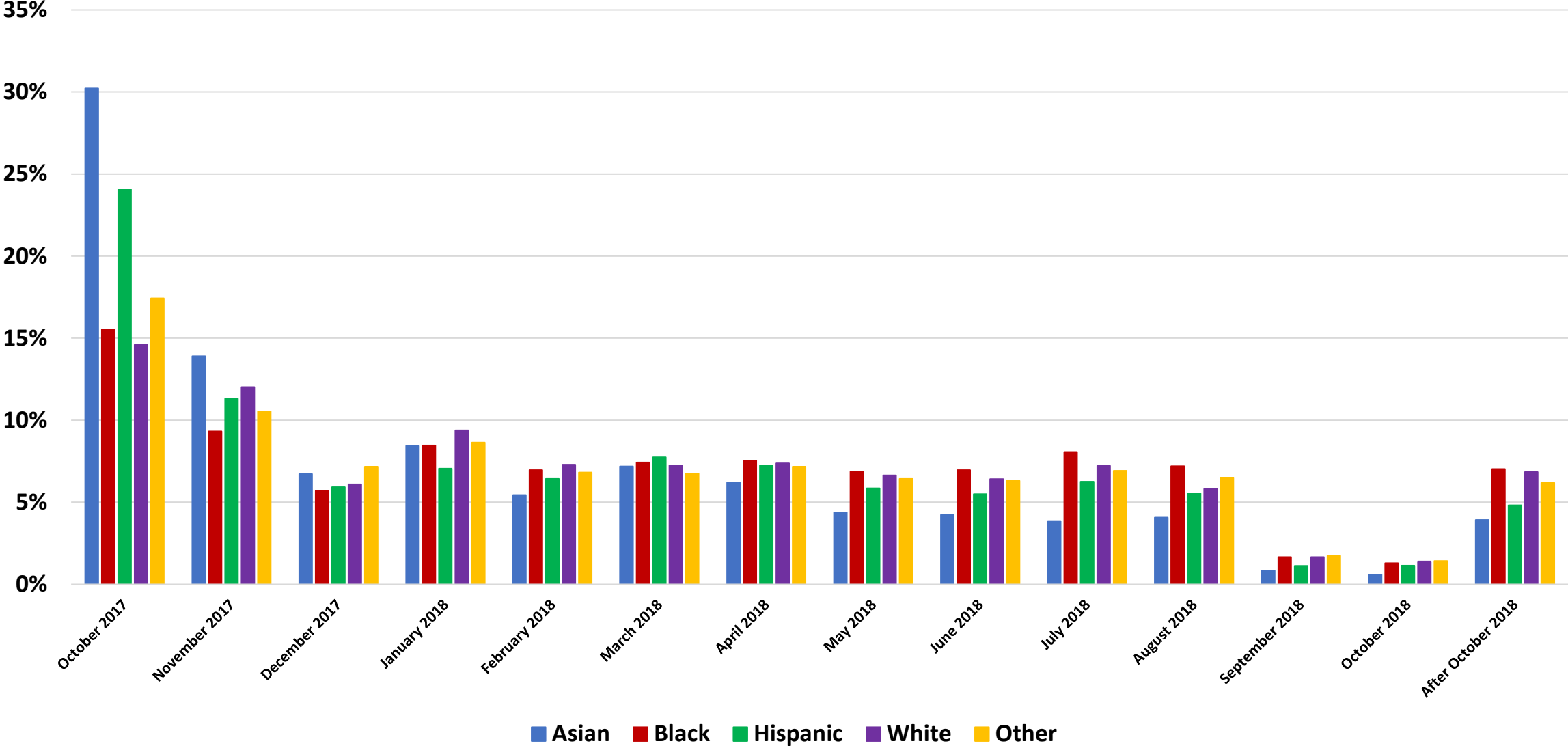
FY 19 FAFSA Filing Date for Initial TEXAS Grant TEOG And TEG Recipients, by Ethnicity

Asian   Black   Hispanic   White   Other
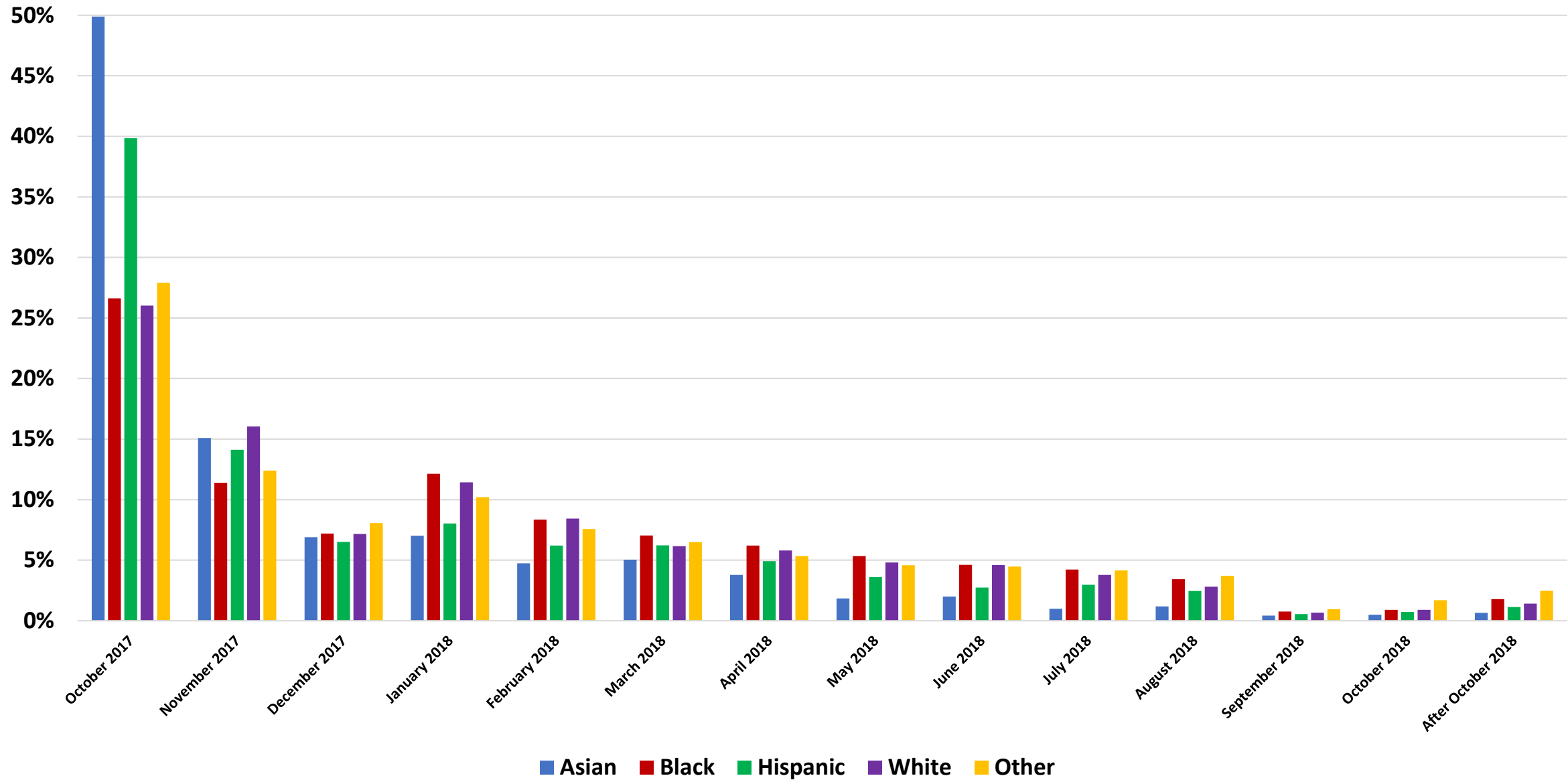
FY 19 FAFSA Filing Date for Students Eligible for an Initial Grant, by EFC and Program

12

Sensitive
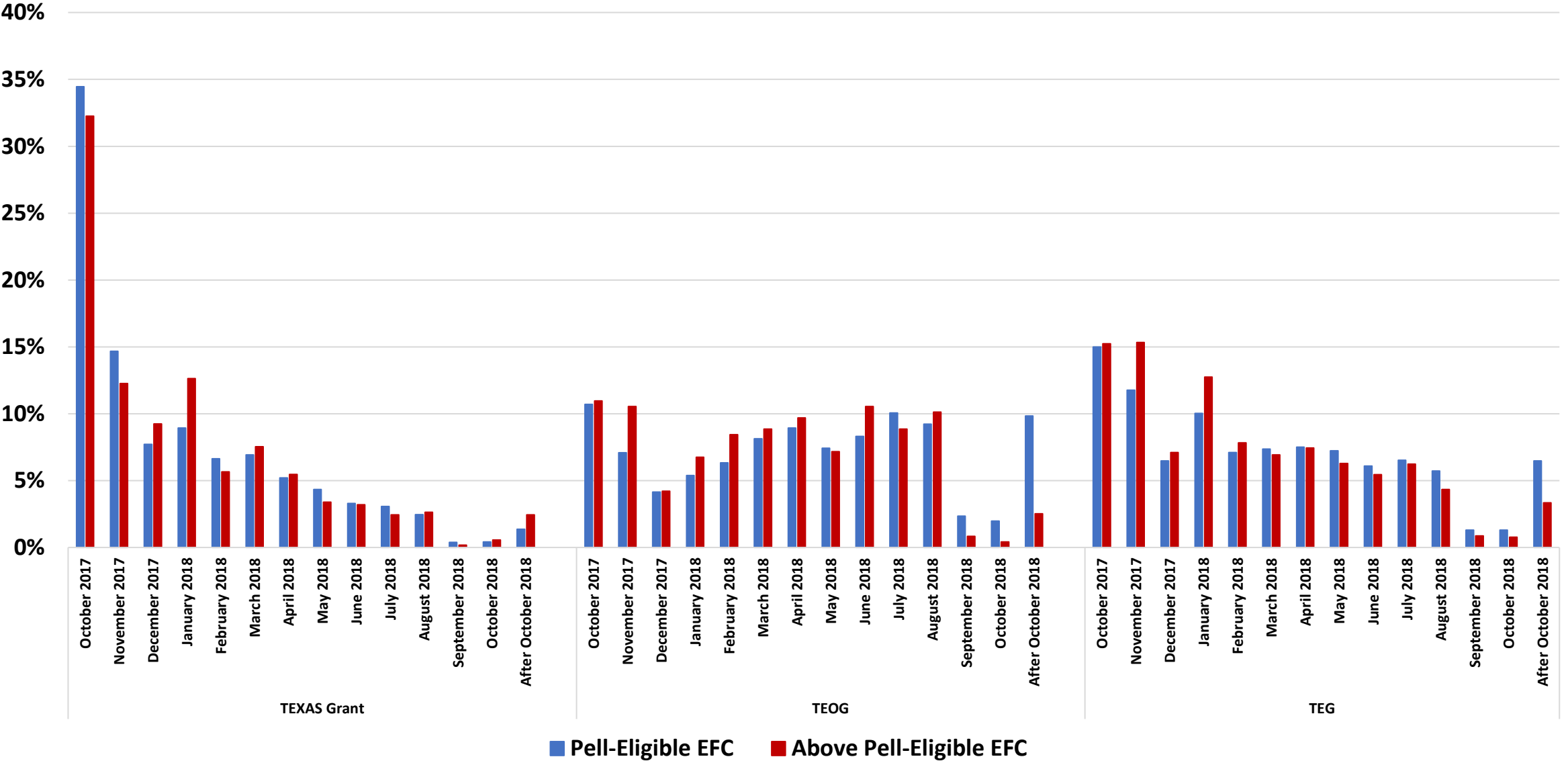
FY 19 FAFSA Filing Date for Initial Recipients, by EFC and Program

Legend: Pell-Eligible EFC (blue), Above Pell-Eligible EFC (red)

Programs: TEXAS Grant, TEOG, TEG

X-axis categories (each program): October 2017, November 2017, December 2017, January 2018, February 2018, March 2018, April 2018, May 2018, June 2018, July 2018, August 2018, September 2018, October 2018, After October 2018

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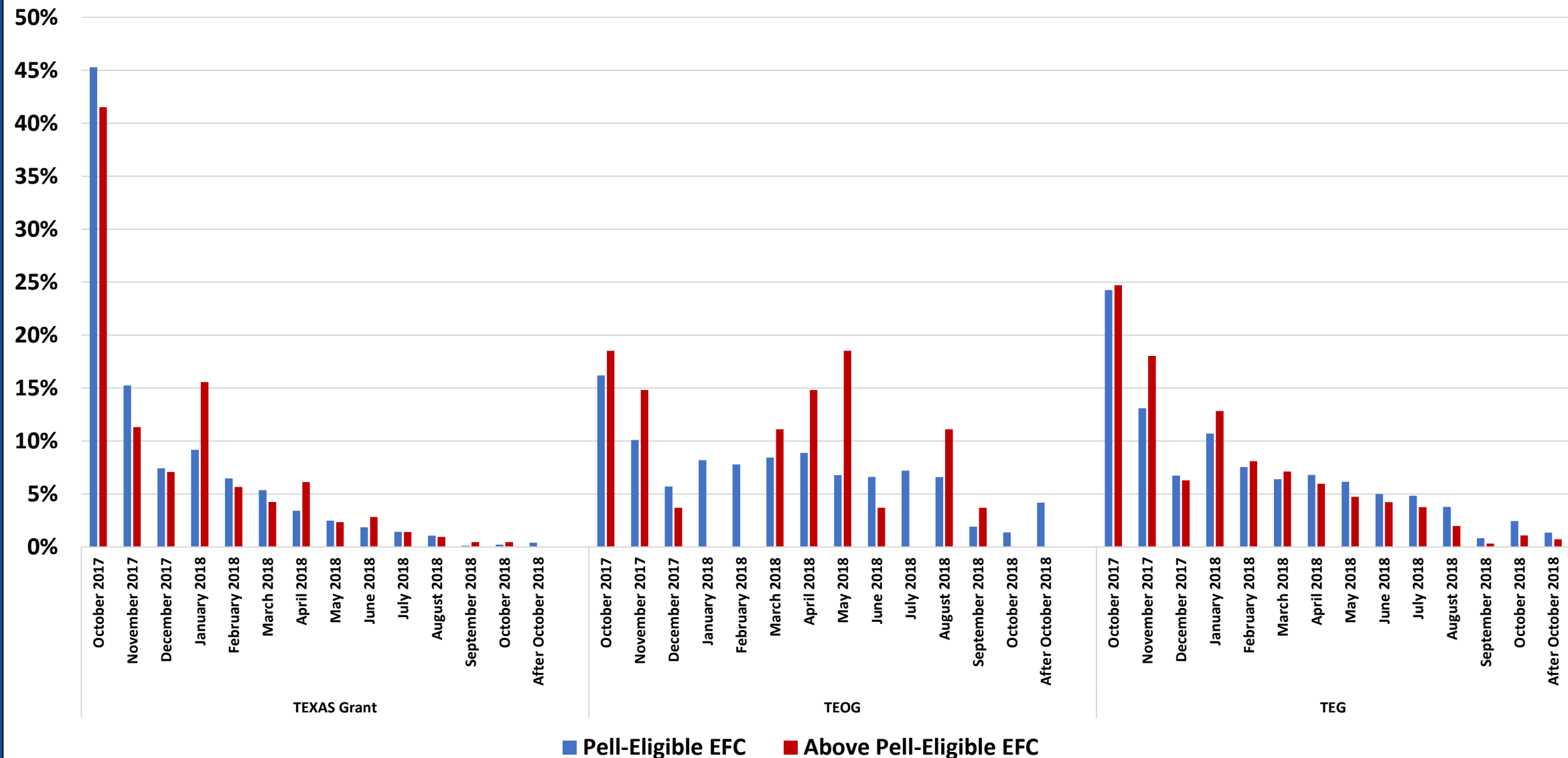
TEXAS HIGHER EDUCATION COORDINATING BOARD
GOVERNOR'S EMERGENCY EDUCATION RELIEF (GEER) FUNDING UPDATE
(Status as of September 2, 2020)

Governor Greg Abbott recently announced the State of Texas will invest $175 million in Governor's Emergency Education Relief (GEER) funding in higher education to provide direct aid to students, support online learning, and enhance the state's higher education data infrastructure and resources. This funding commitment reflects the critical role Texas institutions of higher education and their students will play in driving our state's economic recovery.

NEED-BASED FINANCIAL AID │ $57M
State Grant Programs

The COVID-19 crisis has caused tremendous hardships for Texas students, colleges and universities, and the private-sector economy. This funding will be made available to public and private institutions of higher education to **preserve FY20-21 funding for the TEXAS Grant, Tuition Equalization Grant (TEG), and Texas Educational Opportunity Grant (TEOG) programs**. Updated institutional allocations of funding and other necessary information were provided directly to financial aid offices and institutions are in the process of receiving their funds.

DIRECT STUDENT SUPPORT │ $93M
Emergency Educational Aid

Funding will be made available to public institutions of higher education to support Texas students with demonstrated financial need who have experienced financial hardship due to COVID-19.

Half of the funding ($46.5M) will be distributed for **emergency educational grants for new and continuing students**. The Coordinating Board will disburse these funds through the existing state grant financial aid infrastructure. The intent is to enable institutions of higher education to provide financial assistance quickly to pandemic-impacted undergraduate students and support them in remaining enrolled and on track to attaining their postsecondary credentials. The allocation methodology and program distribution requirements are finalized, and more information was shared directly with institutional financial aid officers. Institutions are in the process of verifying their allocations and receiving funding.

The remainder of the funding ($46.5M) will support **displaced Texas workers who need to reskill or upskill to get back into the workforce and Texans who have previously stopped out of higher education institutions** without completing a postsecondary credential. Priority will be placed on students pursuing credentials in high-demand fields. The Coordinating Board is currently working to develop eligibility criteria and allocation methodologies. These funds are intended to be deployed as quickly as reasonably possible during the 2020-21 academic year.

ONLINE LEARNING SUPPORT │$10M
Open Education Resources, Learning Analytics & Quality Improvement

Funding will be distributed to institutions through matching grants to **enhance quality in online course offerings and reduce the costs of instructional materials for students**. Institutions may receive grants to support faculty teams developing new or redesigning existing open educational resources (OER) for online delivery of one or more of the fifty most frequently transferred Texas Core Curriculum courses; and for implementation of data analytics tools to help drive student progress toward timely and successful completion.

Coordinating Board staff are currently in the initial phases of working through implementation details for this and other components of GEER funding initiatives. This investment in online learning support will help Texas accelerate the pace of innovation, support student progress toward high-value credentials, and reduce the costs of higher education to Texas students and families.

DATA INFRASTRUCTURE │ $15M
Student Advising, Student Progress Dashboards & Data Modernization

Funding will support critical efforts to **modernize and improve state educational and workforce data infrastructure**, to better inform and support students and families on their paths from enrollment, to completion, to the workforce. This funding will include support for interactive advising tools to help students map their most efficient paths to earn credentials and launch their careers. The Coordinating Board is the steward of a wealth of educational and workforce data, and this support and the right partnerships will enable the agency to deploy new tools that turn this data into actionable intelligence for students and families, institutions, employers, and policymakers.

The Coordinating Board will also work with institutions, employers, and other state agencies to implement interactive advising resources, so students can find and compare multiple training opportunities and educational programs, view potential costs and earnings, and connect with postsecondary programs. The agency will also provide dashboards and secure tools to enable every Texas college and university to monitor individual student progress. This funding will enable all public colleges and universities—and any independent colleges which opt in—to monitor and analyze all students' progress-to-credentials.

Update on FAFSA/TASFA Graduation Requirement and TASFA Development

60×30TX
Texas Higher Education Coordinating Board

Financial Aid Advisory Committee

September 3, 2020
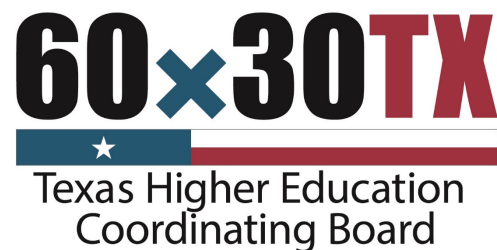
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Texas Education Agency FAFSA Advisory Committee

- Financial Aid Requirement Advisory Committee convened in July and August and will continue to meet monthly throughout the fall
- Key topics discussed at the August meeting include
  - **Providing feedback on TEA's proposed "opt-out" form**, which districts will use to facilitate a process for students to opt out of the requirement either independently or with the signature of a parent or counselor if they are under 18
  - **Providing feedback on implementation resources** districts will need to build capacity in supporting financial aid applications
    - Proposed "toolkits" for various stakeholders (parents, students, counselors)
    - Vision for a user experience in accessing those resources
    - Potential "hubs" for those resources to ensure broad access

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Texas Higher Education Coordinating Board
TASFA Advisory Committee

- TASFA advisory committee convened on July 8 and July 31, 2020
- Key topics discussed include
  - Procedure, development, and associated costs considerations for eTASFA
  - Overview of technical and functional revisions needed to the ApplyTX System
  - Panel discussions with institutions with an existing eTASFA and feedback from student users
  - Created two subcommittees: Higher Education and Student Focused Subcommittee

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Considerations

Procedure
- Uploading documents, i.e. tax transcripts, verification of selective service
- Connect application for selective service via online TASFA
- Electronic signature for student and parent and opt out option, other considerations for physical signature
- Uniformity of supplemental documents: universities coming to agreement on what documents to accept
- Tie to core residency questionnaire
- Student certification or ID pin
- Security of information
- Procedures for when student needs to make correction to the TASFA form
- Considerations for submitting the application to multiple institutions
- Alignment with institution's technical capabilities

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Considerations, cont.

Timelines
- Development: January to September 2021
- Testing
- Technical specifications to software providers on an annual cycle to prepare to implement by October 1.
- Procedures when the paper TASFA is updated to ensure the online version is aligned

Cost
- Seek legislative funding?
- Institutional funds

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Higher Education eTASFA Panel

Panel Discussion with representatives from the Texas A&M University, Texas A&M University-San Antonio, and the University of North Texas

Discussed perspectives from varying stages of implementation

Key Questions Discussed:
- Home grown or vendor
- Cost
- File format used
- Data security

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Higher Education eTASFA Panel, cont.

Key Considerations
- How students would make a corrections
- Having a Spanish version is very important
- Students need to feel secure when putting information on an electronic document, information for financial aid purposes only
- Create a dashboard to see if student "started application"
- Use that data to proactively to communicate with students to let them know where they are in the process
- Ability to "re-set" an application for a student if there are errors
- Ask relevant questions and use skip logic

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Student Feedback

Differences between PDF and the E-TASFA
- PDF was broad, but good. Not as convenient.
- Preferred online version, it was easier.

Experiences with eTASFA
- No way to submit form, never got email for parent signature because application was on hold
- Unsure how to submit the signature, school said to print and fax the signatures
- Lengthy process- submitting additional documents, application on hold for 3 months, with no contact from school.
- User with English as a 2nd language, the questions were complicated.

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Student Feedback, Cont.

Recommendations
- More communication from institutions on next steps in process
- Using clear language
- Box for signatures, in the application, not make it a secondary requirement after submission
- Continue to allow print signatures
- Provide modules and/or pre-recorded video with instructions
- Include notes with additional information for each question would be helpful
- Ability to send to several schools, at one time
- Combine Apply TX and eTASFA
- Access to financial aid counselors to assist students, especially first-generation students

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Texas Higher Education Coordinating Board
TASFA Advisory Committee

Next meeting scheduled September 9, 2020

Key topics for discussion include
- Panel discussion with other states who have a statewide on-line financial aid application
- Discussion of procedure, development, and associated costs for eTASFA
- Updates from subcommittees: Higher Education and Student Focused Subcommittee
- Proposed draft recommendations

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For additional information:

TASFA Development
Claudette Jenks
Director, College Access
Texas Higher Education Coordinating Board
Claudette.jenks@highered.Texas.gov

House Bill 3 - FAFSA High School Graduation Requirement
Alexis Bauserman
Director of Counseling, Advising, and Student Supports
Texas Education Agency
Alexis.Bauserman@tea.Texas.gov

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FAAC Sub-Committee: TAFSA Sub-Committee
Members: Ana Chavez, Chandra Gonzalez, Vanessa Negrete, Robert Merino, Fred Pena,
                    Erin Porter, Joseph Sanchez, and Leah Smalley

The TASFA Sub-Committee met on June 29, 2020, to finalize the following recommendations for the 2021-22 TASFA.

- Add Adjusted Gross Income to the TASFA.
- Add taxes paid to the TASFA.
- Improve the explanation in the parenthesis on #70 to better align with FAFSA's verbiage.
- Add additional verbiage throughout the document to clarify that every question on the TASFA should be answered or marked N/A.
- Reference certain definitions within the question to more clearly steer people to the instructions.
- Add verbiage to direct student to the FA office if they have questions about the Selective Service Status form.
- Add verbiage about SSS.gov as a resource for students that may be unfamiliar with the requirements or the term "exempt".
- Add verbiage regarding school participation "most school participate but check with your financial aid office to confirm which application to use".

The TASFA will be available the first week of September to institutions and October 1 to students.

Texas Higher Education Coordinating Board
Financial Aid Advisory Committee Meeting
TASFAA – Lyn W. Kinyon, 2019/2020 President
September 3, 2020

2019/20 Workshops and Conference

Due to issues related to COVID-19, the in-person Spring Regional Training Workshops, New Aid Officers Workshop, ABC's Pre-Conference Workshop, and the Annual Fall Conference were cancelled. Plans are underway to provide an on-line training opportunity for new aid officers as well as a NASFAA Credentialing Opportunity in Professional Judgment in September or October. In addition, the 2021 New Aid Officers Workshop will be provided electronically in anticipation of continued social distancing requirements and travel budget restrictions.

Upcoming Elections for TASFAA Board Positions

Voting will soon take place for the following slate of candidates for Board positions:

Name	Institution	Position
Cynthia Butler	Dallas County College	President-Elect
Heather Fountain	Texas A&M University	Board Member At-Large
Molly Garrett	Tyler Junior College	Board Member At-Large
Danchees (D) Ingram	UT Southwestern Medical Center	Board Member At-Large
Alan Pixley	Collin College	Board Member At-Large
Thomas Ratliff	Abilene Christian University	Board Member At-Large
Joseph Ruiz	Del Mar College	Board Member At-Large
Joy Thomas	Prairie View A&M University	Board Member At-Large

Recent Board Activity

In response to several task force recommendations, the Board recently adopted a disaster recovery plan, an updated corporate sponsorship plan, and a statement concerning diversity and inclusiveness. A review of the membership dues and structure determined that no changes would be made at this time. Institutions experiencing financial struggles due to budget cuts can submit a 20/21 membership fee hardship request to the Chair of the Membership Committee for consideration.

TASFAA Awards

Nominations will soon be solicited for TASFAA's annual awards including Financial Aid Star, Financial Aid Support, Teaching and Mentoring, and Hall of Fame Awards.

Annual Business Meeting

Though the in-person annual conference has been cancelled, we will conduct our annual business meeting electronically on October 9th as required by our Constitution and By-Laws. In addition to the traditional awards ceremony and various reports/updates from the Board and committee chairs, we will have a federal and state update from the Department of Education and the Texas Higher Education Coordinating Board.

Member Recommendation to THECB

Requests have been received from TASFAA members to encourage the speedy development of the electronic TASFA by THECB. Vendor solutions are quite expensive especially when you break the cost down by application. It has been suggested that the data elements are already known supporting the multiple requests to fast track the development and better assist institutions with processing challenges.

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FAAC Data Collection Sub-Committee Report
September 3, 2020

Sub-Committee Members:

Name	Institution	Email Address
Samantha Stalnaker	Tarrant County College/Chair	samantha.stalnaker@tccd.edu
Carolyn Jones	Collin College	cjones@collin.edu
DeDe Gonzales	Texas State University	dedegonzales@txstate.edu
Ed Turney	University of North Texas	ed.turney@unt.edu
Valerie Quay	St. Edward's University	valeries@stedwards.edu
Angela Oubda	Austin Community Colleges	angela.oubda@austincc.edu
Doris Constantine	University of Texas – Austin	doris@austin.utexas.edu
Veronica Castro	University of Texas – Austin	vcastro@austin.utexas.edu
Cecelia Jones	Jarvis Christian College	ckjones@jarvis.edu
Denise Welch	Panola College	dwelch@panola.edu

Recent Activity:
1. Initiative to Improve the Student Financial Aid Programs (SFAP) webpages. The committee reviewed some recommendations and sample pages and provided feedback on the suggested changes.
    a. Delete all FAQ webpages; incorporate into the annual program guidelines.
    b. Delete the Online Resources webpage; move information on existing on the Online Resources webpage to right-hand banner of relevant program resource pages
    c. Move Webcast Archive webpage link to the Learning Resources webpage
        i. Move recent memos to the SFAP landing page and link archived memo
2. Financial Aid Services Communications group requested additional feedback on the current System Authorization Form used by institutions to add, remove, or update user access for the three financial aid portals (HelmNet, MOVEit and CBPass).
    a. The group reviewed a completely revised document: the User Access Form. We were asked for feedback on navigating as a current user and a new user.

Future Activity:

1. Virtual Meeting is planned for late October or early November.

Action Item Required:

1. FAAC needs to elect new chair for the committee – Samantha Stalnaker current terms ends with the September Meeting

In response to the Potential Discussion Topics for the 87th Legislative Session assembled based on prior FAAC discussion, financial aid studies, recommendations from higher education organizations, and a general review of state financial aid statute, the members of the FAAC Legislative Issues Sub-Committee discussed suggested recommendations. The following highlights the sub-committees commentary and priority recommendations for consideration in alignment with 60C30TX, the Principles of State Financial Aid Redesign and Senate Higher Education Committee Interim Charges:

1. **Federal/State Alignment Opportunities**
    a. Align State aid program's Selective Service requirements, controlled substance requirements, and satisfactory academic progress (SAP) criteria with corresponding Federal aid requirements. Alignment of Selective Service, controlled substance and SAP guidelines for state programs with Federal guidelines supports the completion goals in 60X30TX and aligns with principles of flexibility and student-centered programs. This approach, by aligning the federal and state program rules, will reduce related confusion among students by increasing their access, providing an educational pathway and enhancing completion of higher education.
    b. Align the Texas Educational Opportunity Grant (TEOG) Program matching requirement to that of the Federal Supplemental Educational Opportunity Grant (FSEOG) and/or TEXAS Grant Program matching requirements. This would allow the Federal Pell Grant to be used to match the TEOG grant in covering tuition and required fees. Community Colleges are dependent on this grant in order to increase enrollment and retention rates. The current TEOG matching requirement is an administrative burden due to the timing late in the semester which in turn impacts students. In addition, consideration for TEOG recipients not receiving a TEXAS Grant when transferring to a 4-year school. This approach supports 60X30TX goals in educating students and completion of higher education by students as well as providing and responding to the diverse enrollment options available for students' educational pathways.
        i.   Feedback from TASFAA community – Challenge in TEOG when Pell can't be used as a matching grant but there's not enough need to award any other funds.
        ii. The TEOG matching requirement also piles on funds to a student who may already have a sufficient amount of funding.
    c. Overall, the federal/state alignment opportunity would remove barriers for students, mirror federal programs and align for TASFA application. The opportunity would also facilitate the Senate Higher Education Committee Interim Charges by expanding programs for adult learner students.
    d. Align the state and federal annual debt letter (new Federal Annual Student Loan Acknowledgement requirement delayed until 2021-22). Overall, by comparison, the purpose of both the state and federal debt consumer information piece is to inform students of responsible borrowing and their overall loan debt. However, the federal version eliminates the administrative burden on institutions to administer as well as distribute and puts the responsibility on the student. The following table compares the state and federal student debt information piece:

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Category	State	Federal
Title		Annual Student Loan Acknowledgement* (formerly "Informed Borrowing Confirmation"
Information Dissemination	Applicable to currently enrolled students. (Institution must have at least one student receiving state financial aid)	Applicable to both student and parent borrowers (PLUS loans)
Loans to Include	Federal and state. (Alternative optional)	Federal (routed to NSLDS)
Student/Parent Acknowledgment	No	Yes
Consumer Information	Estimated total educational loans; standard repayment term; estimated interest rate; estimated payment; institutional and ED resources; and on campus contact information.	Outstanding balance; estimated 10-year standard monthly payment based on the borrower's current balance; servicer information; loan limit information; grant summary and grant limit information. First time borrowers who have no current loan balance – College Scorecard information and financial literacy information about borrowing student loans.

*The Annual Student Loan Acknowledgement is a separate process that must be completed even if a borrower has already been provided with similar information under a state requirement.

2. **Work as a Resource**
   a. Propose aligning the Texas Work-Study Mentorship to Texas College Work-Study reinforcing goals of 60x30TX. Currently, the Texas Work-Study Mentorship is not a financial aid function and as a result, it is burdensome to get data to assess the impact to students. In addition, recommend bringing program under Financial Aid Services to align with other state aid programs due to FAD report inclusion.
   b. Encompassing the Texas Work-Study Mentorship as a financial aid function enhances and supports 60X30TX goals in marketable skills and provides an opportunity for manageable student debt while maintaining students' educational pathways.
   c. Based on information provided from November 2019 meeting, the data collection sub-committee noted that the mentorship program has made significant improvements in their reporting to help align with FAD.
3. **Priority Financial Aid Deadline**
   a. Propose assessment of need and purpose of priority financial aid deadline. The priority financial aid deadline guarantees flexibility for schools based on funding and is used as a mechanism for institutions that do not have funding. For some institutions, awarding continues as long as funding is available.
   b. The priority financial aid deadline galvanizes students, on a state-wide basis, to apply early in order to maximize their aid potential. However, the priority financial aid deadline may pose a negative impact for students or restrict student eligibility in terms of enrollment patterns for high school seniors, transfer students and adult learners.
   c. Propose a data informed study on the impact of the priority financial aid deadline and enrollment and application cycles and the impact to eligibility criteria to better address the discussion.

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i. What data would you be looking for outside of the handouts provided? Variables? Part of the concern regarding the state priority date is the misalignment with federal aid. Since many institutions are now providing award notifications much earlier in an attempt to coincide with offer letters, the state deadline does not seem to meet the best needs of students. The data currently provided by THECB is suffice for our discussions.

ii. Help us understand the impact of setting a deadline. Is there any consideration to align state and federal dates? If this were possible, institutions could provide more robust award notifications to assist with strategic enrollment initiatives. We have basically had a priority date due to limited funding. Would be able to say funding is limited and awarded on a first come first basis based on meeting eligibility criteria? We have to ensure we pick up all priority students and all continuing students. Suggest eliminating the deadline date as a viable option. The state deadline does not seem to be in the best interest of students and creates further confusion with regards to federal date alignment.

4. **Increasing TEXAS Grant from the $5,000**
   Overall percentage increase in funding for the TEXAS Grant Program to allow the recommended (target) award amount to increase from $5,000 per year to an amount equitable of the average tuition and fees. The increase would further assist students with financial need. These recommendations support equity and inclusion efforts and are pertinent to 60X30TX goal-Student Loan Debt, increasing the ability for other funding at universities for other non-Texas Grant eligible financially needy students; enabling universities to meet more of their financial need. If the legislature does not provide additional appropriations to fund an increased target award, the subcommittee recommends the target award remain at $5,000.

Other items of discussion within the sub-committee:

1. **CAL Program**
   a. Delinquent borrowers-removal of transcript hold lifted a roadblock for students. However, the continuation of monthly reports on delinquent borrowers would be beneficial for institutions to assist in follow-up and counseling of students.
   b. A case/issue number should be assigned to all inquiries to allow for tracking/updates.
   c. THECB year-end closeout and system outages occur during peak processing time-minimize down-time. Note – this is the Comptroller's close-out not THECB.
2. **Federal/State Alignment Opportunities for Consideration**
   a. Course Program of Study (CPOS)
3. **THECB Leadership**
   a. Direction of new leadership
4. **Net Price Calculator**
   a. Recommend a revamp of current platform
   b. Third-party servicer
   c. The data collection sub-committee noted that a proposal was being discussed to redesign the net price calculator tool. They are looking for a re-design that is user-friendly for students, institutions and public in full compliance. They were asked to ensure the re-design provided consistency across the board on how institutions are to provide data and to provide additional training to institutions for using the tool.
5. **Promise Programs –**
   a. Consider possible mandate or implementation
6. **Work-Study Allocation Concerns**
   a. Schools that do not use allocation – returning program funds or authority to transfer funds.

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7. **Populations Not Being Served**
   a. Community Colleges and perhaps 4-year institutions are utilizing ATB to help serve adult learners in order to assist with adequacy of FA programs. FAAC feels this is being met with alignment opportunities.
8. **Grad TX**-
   a. Encourage more students to complete a 2yrs/4yrs degree include more partners into this program (state and private institutions).

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FAAC Legislative Sub-Committee 2019-20 Members

Name	Affiliation	Email Address
Shannon Crossland, Chair	Texas Tech University	shannon.crossland@ttu.edu
Robert Merino	FAAC Chair	robert.merino@sjcd.edu
Cynthia Butler	DCCCD	cbutler@dcccd.edu
Victoria Chen	TCU	v.chen@tcu.edu
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Fred Pena	Texas State Technical College	fred.pena@tstc.edu
Diane Todd Sprague	University of Texas at Austin	DTSprague@austin.utexas.edu
Kara Tappendorf	Pflugerville ISD	Kara.Tappendorf@pfisd.net
Harold Whitis	Alamo Colleges District	hwhitis2@alamo.edu

Recommended new Financial Aid Advisory Committee members:

Taryn Anderson
Director of Financial Aid
University of Dallas
(Nominated for a one-year term as the TASFAA representative.)

Johanna Boley
Senior Associate Vice Chancellor, Financial Aid
Lone Star College
(Term ending 2023)

Victoria Chen
Director of Scholarships and Student Financial Aid
Texas Christian University
(Term ending 2023)

Dede Gonzales
Associate Director of Financial Aid and Scholarships
Texas State University
(Term ending 2023)

Bridgette Ingram
Director
Texas A&M University
(Term ending 2023)

Holly Nolan
Executive Director of Financial Aid
University of Houston - Clear Lake
(Term ending 2023)

Shonna Norton
Director of Social and Emotional Services
Wichita Falls ISD
(Term ending 2023)

Steven Peterson
Director of Financial Aid and Scholarships
Blinn College
(Term ending 2023)

Arnold Trejo
Executive Director of Financial Aid and Scholarships
University of Texas at San Antonio
(Term ending 2023)

Financial Aid Advisory Committee
September 3, 2020
Agenda Item 14: Discussion Topic – Student Representative from the 2-Year Sector

We have not received nominations for a student from the two-year sector in any of the past three nomination cycles. Does the committee want to continue holding one of the 24 committee slots for a student representative from the two-year sector?

Several factors make it challenging to identify a student from the two-year sector who can fulfill the term of office.

- TEC §61.071 requires that student representatives on advisory committees serve a term of not less than two years.
- Student representatives must maintain enrollment at a public institution for the duration of the student's term.
- The nomination process for student representatives occurs over the course of an academic year, followed by two academic years serving on the committee:
  - September 1: Deadline for presidents and chancellors to begin solicitation of nomination applications
  - December 1: Deadline for presidents and chancellors to submit a nomination
  - February 1: Deadline for the Board to appoint student representatives to the advisory committees
  - June 1: Beginning of the student representative's two-year term.

Rules Activity

The following rules were **adopted** since the March 3, 2020, FAAC meeting, please see the details below:

Chapter 21. Student Services
Subchapter C. Student Indebtedness
Section(s): 21.49 (Amendment)
Texas Register Publication Date: July 31, 2020
Effective date: August 3, 2020

Chapter 22. Student Financial Aid Programs
Subchapter G. Texas College Work-Study Program
Section(s): 22.127-22.132, 22.134 (New / Amendment)
Section(s): 22.135 (Repealed)
Texas Register Publication Date: July 31, 2020
Effective date: August 3, 2020

Chapter 22. Student Financial Aid Programs
Subchapter I. Texas Armed Services Scholarship Program
Section(s): 22.163 - 22.168, 22.170 - 22.173, 22.174 (New / Amendment)
Section(s): 22.169, 22.174 (Repealed)
Texas Register Publication Date: July 31, 2020
Effective date: August 3, 2020

Chapter 22. Student Financial Aid Programs
Subchapter M. Texas Educational Opportunity Grant Program
Section(s): 22.253-22.261 (New / Amendment)
Section(s): 22.257-22.261, 22.263 (Repealed)
Texas Register Publication Date: July 31, 2020
Effective date: August 3, 2020

Chapter 22. Student Financial Aid Programs
Subchapter X. Teach For Texas Conditional Grant Program
Section(s): 22.625, 22.626, 22.631 (Amendment)
Section(s): 22.627-22.630, 22.632, 22.642-22.643 (Repeal)
Texas Register Publication Date: July 31, 2020
Effective date: August 3, 2020

Chapter 22. Student Financial Aid Programs
Subchapter Y. Teach For Texas Alternative Certification Conditional Grant Program
Section(s): 22.663, 22.664, 22.668 (Amendment)
Section(s): 22.665-22.667, 22.669, 22.678-22.679 (Repeal)
Texas Register Publication Date: July 31, 2020
Effective date: August 3, 2020

The following **proposed rules** were published in the *Texas Register* on August 21, 2020. Please see the details below:

Chapter 22. Student Financial Aid Programs
Subchapter A. General Provisions
Section(s): 22.11 (Amendment)
Texas Register Publication Date: August 21, 2020
30-day Comment Period Ends: September 20, 2020

Chapter 22. Student Financial Aid Programs
Subchapter B. Provisions For The Tuition Equalization Grant Program
Section(s): 22.28 (Amendment)
Texas Register Publication Date: August 21, 2020
30-day Comment Period Ends: September 20, 2020

Chapter 22. Student Financial Aid Programs
Subchapter L. Toward EXcellence, Access, And Success (TEXAS) Grant Program
Section(s): 22.225-22.231, 22.233, 22.234, 22.241 (Amendment)
Section(s): 22.232, 22.235, 22.238-22.240, 22.242 (Repeal)
Texas Register Publication Date: August 21, 2020
30-day Comment Period Ends: September 20, 2020

Chapter 22. Student Financial Aid Programs
Subchapter M. Texas Educational Opportunity Grant Program
Section(s): 22.261 (Amendment)
Texas Register Publication Date: August 21, 2020
30-day Comment Period Ends: September 20, 2020

Chapter 22. Student Financial Aid Programs
Subchapter Q. Texas B-On-Time Loan Program
Section(s): 22.329, 22.330, 22.339, 22.341 (Amendment)
Section(s): 22.331-22.336, 22.342-22.344 (Repeal)
Texas Register Publication Date: August 21, 2020
30-day Comment Period Ends: September 20, 2020

Chapter 23. Education Loan Repayment Programs
Subchapter C. The Physician Education Loan Repayment Program
Section(s): 23.65-23.67 (Amendment)
Texas Register Publication Date: August 21, 2020
30-day Comment Period Ends: September 20, 2020

Chapter 23. Education Loan Repayment Programs
Subchapter H. Peace Officer Loan Repayment Assistance Program
Section(s): 23.211, 23.214 (Amendment)
Texas Register Publication Date: August 21, 2020
30-day Comment Period Ends: September 20, 2020

Announcements:

- **CAL Interest Rate:** The CAL interest rate was decreased to 4.2% for new loans certified on or after July 1, 2020.

- **Institutional Calendar:** The 2020-21 institutional calendar is updated for the fall semester and can be found on the SFAP webpage under Stay Connected.

- **User Access Form:** The System Authorization Form has been revised and renamed the "User Access to Web Portals Form" and is located on the right-hand banner on various Program Resources webpages. Institutions should begin using the new form and discard any prior versions, which will no longer be accepted by the THECB for portal access/update requests.

Deadlines:

- 10/02 (Friday) Deadline to submit 2020-21 (FY 2021) Net Price Calculator (NPC) data upload
- 12/11 (Friday) FAD deadline to reconcile state program totals and certify student data

Accomplishments since last FAAC meeting:

- **Online HelmNet Reporting:** A new HelmNet Online Reporting tool launched Aug. 3, 2020, and provides institutions a secure method to run and export real-time data for the College Access Loan (CAL), Texas Armed Services Scholarship Program (TASSP), and B-on-Time (BOT) programs. Administrators can access program summaries as well as borrower-specific details from application to final disbursement. The Online HelmNet Reporting instruction manual is located on the SFAP webpage under **Program Resources** on both the Loans and Scholarships webpages on the right-hand banner.

- **SFAP Webpage Updates:** We are reorganizing and consolidating information on the SFAP webpage. Some of these changes include:
  - Adding the *Webcast Archives* page to the Learning Resources page.
  - Removing the *Online Resources* page and incorporating the existing information into the appropriate Program Resource pages.
  - Removing the original **Work-Study Student Mentorship** (WSMP) page and relocating it to the SFAP webpage under **Program Resources**.

- **HelmNet improvements:** The HelmNet website used by customers to access their online accounts has been updated to be mobile friendly. It is now a responsive web design coded to render the content and layout properly on different screen sizes and a variety of devices such as cell phones and tablets. The new design will detect the customer's screen size and orientation and changes the layout accordingly. Improvements to the ACH enrollment screens were also implemented.

- **Peace Officer Loan Repayment Program:** This new program launched on September 1, 2020, providing loan repayments for eligible peace officers.

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