

Financial Aid Advisory Committee Meeting Agenda

Name of Committee: Financial Aid Advisory Committee Date of Meeting: Mar. 3, 2022

Time of Meeting: 9:00a.m.

Location: Virtual Meeting

Agenda

- 1. Welcome, Introductions, and Overview of Meeting – Denise Welch, Chair**
- 2. Consideration of Approval of Minutes from the meeting held on Dec. 9– Denise Welch, Chair**
- 3. Update: Prior FAAC Business– DeChà Reid, Senior Director**
- 4. External Presentation: Certified Financial Aid Administrator Program- Shannon Crossland, Commission Chair, Frank Phillips College**
- 5. External Presentation: Reskilling and Upskilling Program-Dr. Sheri Ranis, Director, Workforce Education**
- 6. Update: External Relations – John Wyatt, Sr. Director, External Relations**
- 7. Update: THECB Financial Aid Strategic Priority-Charles Conterò-Puls, Assistant Commissioner**
- 8. Update: TASFA Subcommittee – Bridgette Ingram, Subcommittee Chair and Claudette Jenks, Director, College Readiness and Success**
- 9. Update: Data Collection Subcommittee – Dede Gonzales, Subcommittee Chair**
- 10. Update: Legislative Subcommittee – Arnold Trejo, Subcommittee Chair**
- 11. Update: Texas Association for State Financial Aid Administrator's (TASFAA) – Robert Merino, TASFAA President**
- 12. Update: High School District – Ben Bholan, Arlington ISD; Shonna Norton, Wichita Falls ISD**
- 13. Update: Office of Student Financial Aid Programs – DeChà Reid, Senior Director**
- 14. Discussion Topic: Feedback on how schools are administering Reskilling and Upskilling-Denise Welch, Chair**
- 15. Discussion Topic: Feedback on the decrease in loan borrowing- DeChà Reid, Senior Director**
- 16. Discussion Topic: Feedback on creating a succession plan-Rachelè Garrett, Vice Chair**
- 17. Discussion Topic: Feedback for Future Meetings – Denise Welch, Chair**
- 18. Adjournment – Denise Welch, Chair**

Financial Aid Advisory Committee
Meeting Notes
Dec. 9, 2021
(To be approved at the March 3, 2022, FAAC Meeting)

Committee Members in Attendance Via <u>Virtual</u> Meeting Connection		Committee Members Absent
Jackie Adler Ben Bholan Victoria Chen Rachele Garrett Bridgette Ingram Cecelia Jones Ed Kerestly Melet Leafgrean Robert Merino Holly Nolan Shonna Norton	Steven Peterson Joseph Ruiz Arnold Trejo Tevian Sides Thomas Ratliff Joy Thomas DeDe Gonzales Jase Kugiya Sal Ramirez Gilbert Zavala	
Agenda Item 1. Welcome, Introductions and Overview of Meeting		Denise Welch, Chair
Handout Provided: Yes		Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> • Introduction of all new committee members by Denise Welch • Introduction of all current committee members <p>**See handout for agenda item 1 for more information</p>		
Agenda Item 2. Consideration of Approval of Minutes from the meeting held on Sept. 2, 2021		Denise Welch, Chair
Handout Provided: Yes		Formal Decision/Action Required Minutes approved
Presentation Summary: <ul style="list-style-type: none"> • No corrections were identified. <p>**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"> • No Prior Business 		
Agenda Item 4. Discussion: Financial Aid Strategy		Charles Conterò-Puls, Assistant Commissioner
Handout Provided: Yes		Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • Transfer Grant will not be funded at the community college; this is a vertical transfer to a 4-year university (individuals transferring from a 2-year to 4-yr) <ul style="list-style-type: none"> • Funds about 1600 students • Student is in a 2-yr currently and will transfer to a 4-yr in a university next academic year. • Final stages of the contract with a 3rd party who will select participants for the program. 		
Agenda Item 5. Update: External Relations		John Wyatt, Senior Director, THECB-External Relations
Handout Provided: No		Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • There were no updates from John Wyatt • Denise Welch provided a brief description about External Relations for our new committee members. <ul style="list-style-type: none"> ◦ External Relations is a liaison for the agency to work with the Governor, Legislatures and other stakeholders (e.g., colleges, universities) to provide data and information on higher education. • Committee members requested feedback concerning the Federal and State difference in Selective Service 		

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Agenda Item 6. Update: House Bill 3 (FAFSA/TASFA Graduation Requirement); House Bill 2140 (on-line TASFAA); and TASFAA Subcommittee	Claudette Jenks, Director, College Readiness and Success
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> Online TASFA has been created to allow students to save and complete First launch will be on Oct. 1 (available in English) Share a Spanish version in phase II Working with General Counsel to determine an electronic signature process Working on a marketing strategy and ApplyTX staff to provide a link in the Counselor Suite Working to provide data in the Counselor Suite so Counselors can see the completion of TASFA TX OnCourse has provided tool kits for the new graduation requirement to complete a TASFA and FAFSA Will meet with the TASFA workgroup on the file layout. Create and share a file layout by early next year in 2022 (goal is in January); been in consultation with vendors on the file layout. Rules are being established and will be published in January. Adopted by the Board in late April 	
Agenda Item 7. Data Collection Subcommittee	Dede Gonzales, Subcommittee Chair
Handout Provided: Yes	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> <p style="text-align: center;">**See handout for agenda item 7 for more information.</p>	
Agenda Item 8. Update: Legislative Committee	Arnold Trejo, Subcommittee Chair
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> The Chair of the FAAC Legislative Subcommittee is a part of the TASFAA Legislative Subcommittee is a part of the TASFAA Legislative as a committee member/FAAC representative. <ul style="list-style-type: none"> FAAC will collaborate with TASFAA on Legislative issues Meet with Karen on the new partnership with TASFAA Legislative Committee <ul style="list-style-type: none"> Need to identify common themes TASFAA is creating the Legislative Committee (Karen Krause, Christ Murr, and Arnold); still forming the committee based on volunteers 	
Agenda Item 9. Update: TASFAA Recommendations and Feedback	Robert Merino, TASFAA
Handout Provided:	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> Very successful conference with 250 attendees for the Oct. 2021 Carolyn Jones was inducted into the Hall of Fame Raised over \$3k for the Boys and Girls Club Started 2022 year on Nov. 1 Corpus Christi will be the host city for the Oct. 2022 Volunteer form is still active to volunteer for the TASFAA Committees until next week. Are making some selections with those that have volunteers. 	
Agenda Item 10. Update: School District Feedback	Ben Bholan, Arlington ISD; Shonna Norton, Wichita Falls ISD
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> Talking with District and noticing the difference with having students in-person Aggressive efforts with the Seniors to make sure that they graduate timely. Having students in-person has yielded better results with completion of FAFSA and applying for college. 	

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<ul style="list-style-type: none"> • More successful with students that appear in-person for dual credit than virtual setting. • Continued challenge is the ones that wait to apply for financial aid in May and not earlier. • FAFSA/TASFA Graduation requirement: Shonna's perspective is that there has not been a change to the approach with completing the FAFSA or TASFA. 	
Agenda Item 11. Update: Office of Student Financial Aid Programs (SFAP)	DeChà Reid, Senior Director
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • GEER Return of Funds Form Updated – Financial Aid Services (FAS) recently updated the Governor's Emergency Education Relief (GEER) Return of Funds Form to expand the options available to institutions to refund unused aid and any interest accrued. The two new PCA options on the form include the Reskilling Support Fund and the Open Education Resources which were added to help streamline additional GEER programs that have funding being returned by institutions. Also, the form was updated to include a direct link to the Electronic Funds Transfer Instructions which allows schools to access the details related to returning funds back to the Texas Higher Education Coordinating Board via wire transfer, Automated Clearing House (ACH), paper check or through the Uniform Statewide Accounting System (USAS). • Electronic Funds Transfer (EFT) Instructions Updated – The EFT instructions were updated this year to provide information on the Recurring Transfer Index (RTI) process which is used by public universities to return certain types of state aid through the Uniformed State Accounting System (USAS). FAS worked closely with the agency's Finance team to ensure that the updated EFT instructions provided clear guidance on the RTI refund process and included a recent memo that clarified the set-up process through USAS. • News Across SFAP, we are hiring staff for all positions. We currently have a vacant position for XXXXX • Institutional Calendar – Changes to the institutional calendar for fall 2021. There will be a new spring 2022 institutional calendar published soon. • HB133-Changes to Statute – A change to the statute relating to education benefits at public institutions of higher education for certain survivors of public servants <ul style="list-style-type: none"> ○ During the Special Session HB 133 Changes to the Texas Education Code 54.354 (a) – Benefits of Survivors ○ Changes within the statute now allows the surviving child to be up to 25 years at the age at the time of the parent's death instead of 18 ○ Does not begin until the cost charged for spring 2022 ○ Not retroactive ○ A formal communication will be sent out to schools soon • Upcoming deadlines: FAD Cycle 3 deadline is Dec. 17th. <ul style="list-style-type: none"> ○ There are 88 schools that still need to certify and 8 schools that need to submit a FAD file. Files need to be submitted soon. 	
Agenda Item 12. Discussion: Proposed Amendments to TAC, Title 19, Part 1 Chapter 22, Subchapter A, Sections 22.1, 22.3, 22.6, and 22.11	DeChà Reid, Senior Director
Handout Provided: Yes	Formal Decision/Action Required N/A
Discussion Summary: <ul style="list-style-type: none"> • Overview of the Proposed Amendments to TAC, Title, Title 19, Part 1, Chapter 22, Subchapter A, Sections 22.1, 22.3, 22.6 and 22.11 <p>**See handout for agenda item 12 for more information.</p>	
Agenda Item 13. Discussion: Election of Vice Chair	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required Yes/Motion Passed
Update Summary: <ul style="list-style-type: none"> • Motion made by Ed Kerestly to elect Rachele Garrett for Vice Chair • Nomination accepted from Rachele Garrett • Arnold Trejo seconds the motion • Motion passed unanimously 	

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Agenda Item 14. Discussion: Selection of TASFA Subcommittee Chair	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required Yes/Motion Passed
Presentation Summary: <ul style="list-style-type: none"> • Motion made by Arnold Trejo to elect Bridgette Ingram • Nomination accepted from Bridgette Ingram • Motion passes unanimously 	
Agenda Item 15. Discussion: 2022 FAAC Meeting Dates	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> • Proposed meeting dates <ul style="list-style-type: none"> ◦ March 3, 2022 ◦ June 2, 2022 ◦ September 8, 2022 ◦ December 8, 2022 • Dates agreed upon by the FAAC • Meetings for the 2022 year will remain virtual. 	
Agenda Item 16. Discussion: Feedback on the Depart of Education Federal Student Aid Conference	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none"> • There was feedback from the committee members concerning the online conference. They were disappointed with online version of the conference; it was difficult to get all of the information out of the conference. • There was feedback from the committee members stating their concerns that there was no verification for 2023-2024 • Pre-recording was not the same as a live presentation online; these were webinars • Hard to engage when there are distractions • Content was superior for this year • FAFSA Simplification and all the changes especially with other agencies (e.g.); challenge with explaining the Student Aid Index (SAI). • Would like immediate access of information instead of waiting for months to get information from the conference 	
Agenda Item 17. Discussion: Topics for Future Meetings	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> • Better understanding on how effective state financial aid programs from year-to-year retention and completion <ul style="list-style-type: none"> ◦ State Assistance vs. Outcome (data-financial Aid Report) • Compare data from students with financial assistance vs. no assistance (data) • Committee members would like an external speaker on the demographic trends of the state and the requirement of graduation <ul style="list-style-type: none"> ◦ Data – external research-broad strategic presentation on how the state is moving concerning Policy • Discussion on lessons from the post-Covid world after the funds end from the government <ul style="list-style-type: none"> ◦ Was there any evidence that additional resources made a difference with a student staying enrolled • Future updates on the Strategic Financial Aid Priority • Student Aid Index 	
Agenda Item 18. Adjournment	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none"> • Adjournment at 11:49 a.m. 	



NASFAA's Certified Financial Aid Administrator® Program

Presentation to THECB Financial Aid Advisory Committee

March 3, 2022



Introductions



Shannon Crossland, M.Ed., FAAC®

Chair, Certified Financial Aid Administrator® Program Commission

Director of Student Financial Services

Frank Phillips College

scrossland@fpctx.edu



What phase of the certification process are you in?

- ☐ I haven't applied yet, but I'm interested in learning more
- ☐ I've applied, but I haven't purchased my knowledge exam yet
- ☐ I've purchased my knowledge exam
- ☐ I'm an FAAC®!

Setting the Standard

“By engaging and utilizing opportunities to promote professional awareness, support our colleagues, and enhance our profession, we are contributing to the success of our higher education communities, our institutions, and our students.”

Shannon Crossland, FAAC®
Commission Chair, 2021-22



Knowledge



Experience



Integrity



Community Involvement

- Subject Matter Experts (SMEs)
- Representative sample
- Psychometric analysis
- Review and maintenance
- Oversight

CFAA Program Commission – 2021-22

Officers



Commission Chair,
Southwest Representative
Shannon Crossland, FAAC®
Frank Phillips College



Commission Chair-Elect,
Western Representative
Christina Tangelakis, FAAC®
Glendale Comm. College



Past Chair, Commissioner-
At-Large
Kathy Bialk, FAAC®
University of Kentucky

Regional Representatives



Eastern
Phillip Hawkins, FAAC®
George Washington
University School of Law



Midwestern
Craig Slaughter, FAAC®
Kenyon College



Rocky Mountain
Nathan Buche, FAAC®
Hutchinson Community
College



Southern
Daniel Barkowitz, FAAC®
Valencia College

Commissioner-At-Large



Lindsay Bridgeman, FAAC®
Grantham University

Public Representative

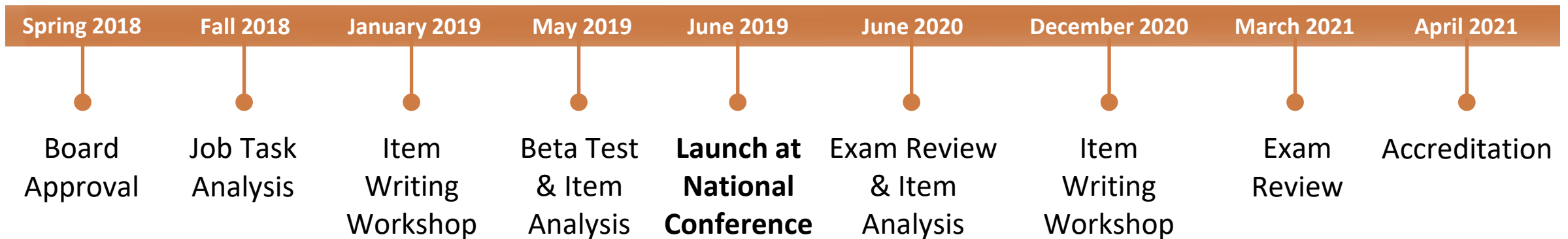


Todd Philbrick
The American Speech-
Language-Hearing
Association (ASHA)

Program Design and Development

Purpose: Enhance the future of the financial aid profession

- Recognize knowledge and experience
- Inspire quality job performance and ethical behavior
- Encourage continuous learning and professional growth



Accreditation

AERE's Credential Quality Standards achieved!

- Rigorous assessment against industry standards
- Affirms quality and defensibility of the certification program
- April 2021

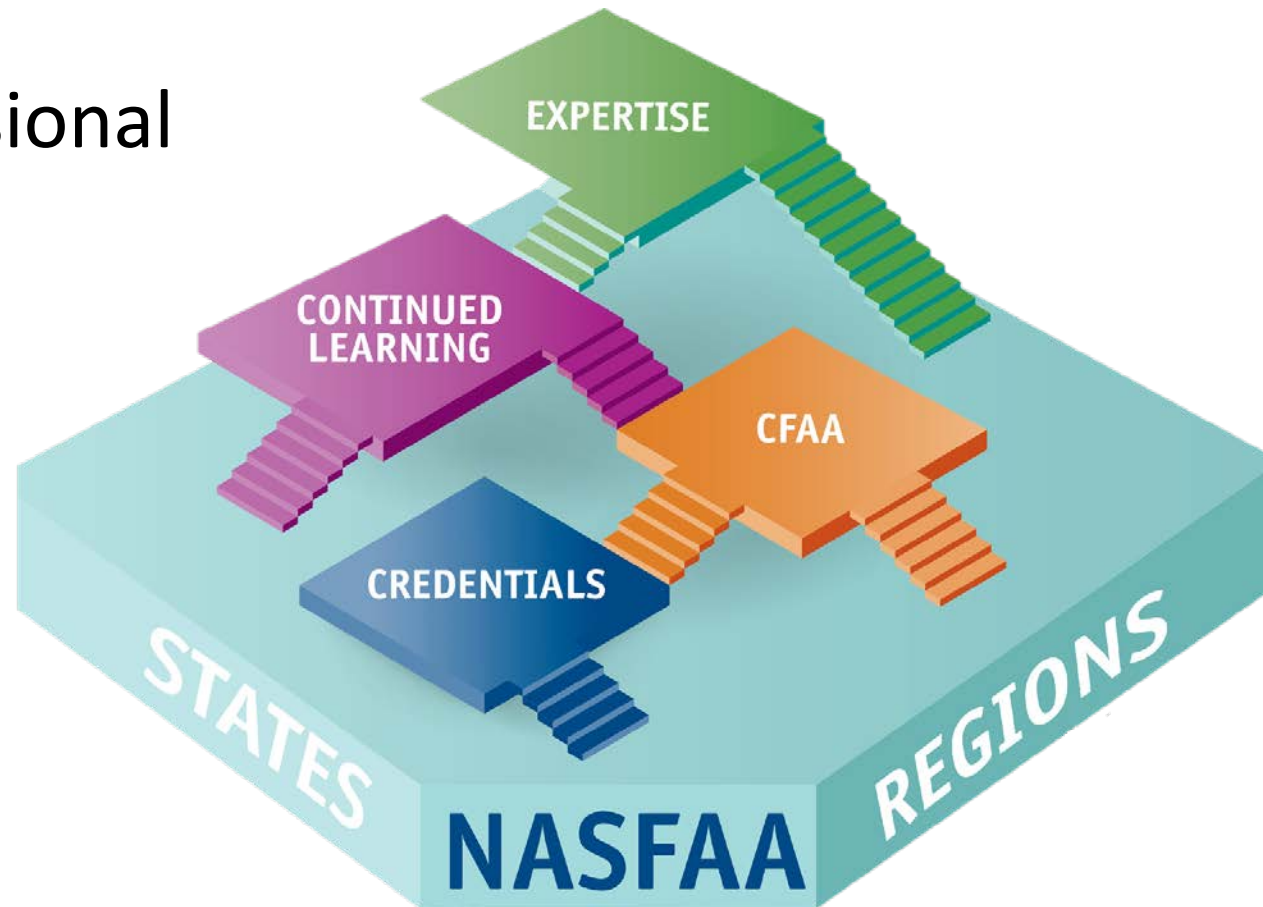


Involvement in the Development of the CFAA Program



It's More Than Just An Exam...

Part of a professional
development
ecosystem



Lead The Way!



CHECK YOUR
ELIGIBILITY



APPLY ONLINE



PASS THE EXAM



MAINTAIN YOUR
CERTIFICATION



WELCOME

Interested in the Certified Financial Aid Administrator[®] Program? Scroll to answer questions below to determine your eligibility.



nasfaa.org/certification_interactive

Eligibility Requirements

- Hold a bachelor's degree or higher
- Professional financial aid experience and knowledge:
 - 5 years;
 - 3 years with at least 7 NASFAA credentials; or
 - 1 year with at least 12 NASFAA credentials
- Attest to uphold NASFAA's Code of Conduct and Statement of Ethical Principles

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NASFAA Membership: Active

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Certified Financial Aid Administrator® Program Dashboard

Your certification status: Not Started

Financial aid professionals have long sought certification and it's finally here. This Dashboard serves as your guide throughout the entire certification process. As you complete each stage, the next one becomes available for activity. See the [Candidate Handbook](#) for full program details.

If you'd prefer not to be listed in the [Certified Financial Aid Administrator® Registry](#) once achieved, please update below.

☐ Do not include me in the CFAA Registry

Certification Application & Exam [Open All](#) | [Collapse All](#)


Get started by submitting the certification application, which confirms your eligibility requirements. You can save your work at any stage of the application, and return to it to complete it at a later time. Once submitted, you may not make any changes.

Application Not Started

Certification

Use the links below to complete your certification application. Once submitted, you may not make any changes. You

nasfaa.org/certification_dashboard

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Application Form: Step 1 - Applicant Info

STEP 1: APPLICANT INFO

STEP 2: HIGHER EDUCATION

STEP 3: EXPERIENCE

STEP 4: CODE OF CONDUCT

STEP 5: SUBMIT YOUR APPLICATION

The following information populates from your NASFAA account where applicable. If employer or contact information is listed incorrectly, [edit your myNASFAA contact information](#), then return to this page to complete your application.

Title:

First Name:

Last Name:

NASFAA Individual ID:

Institution/Organization:

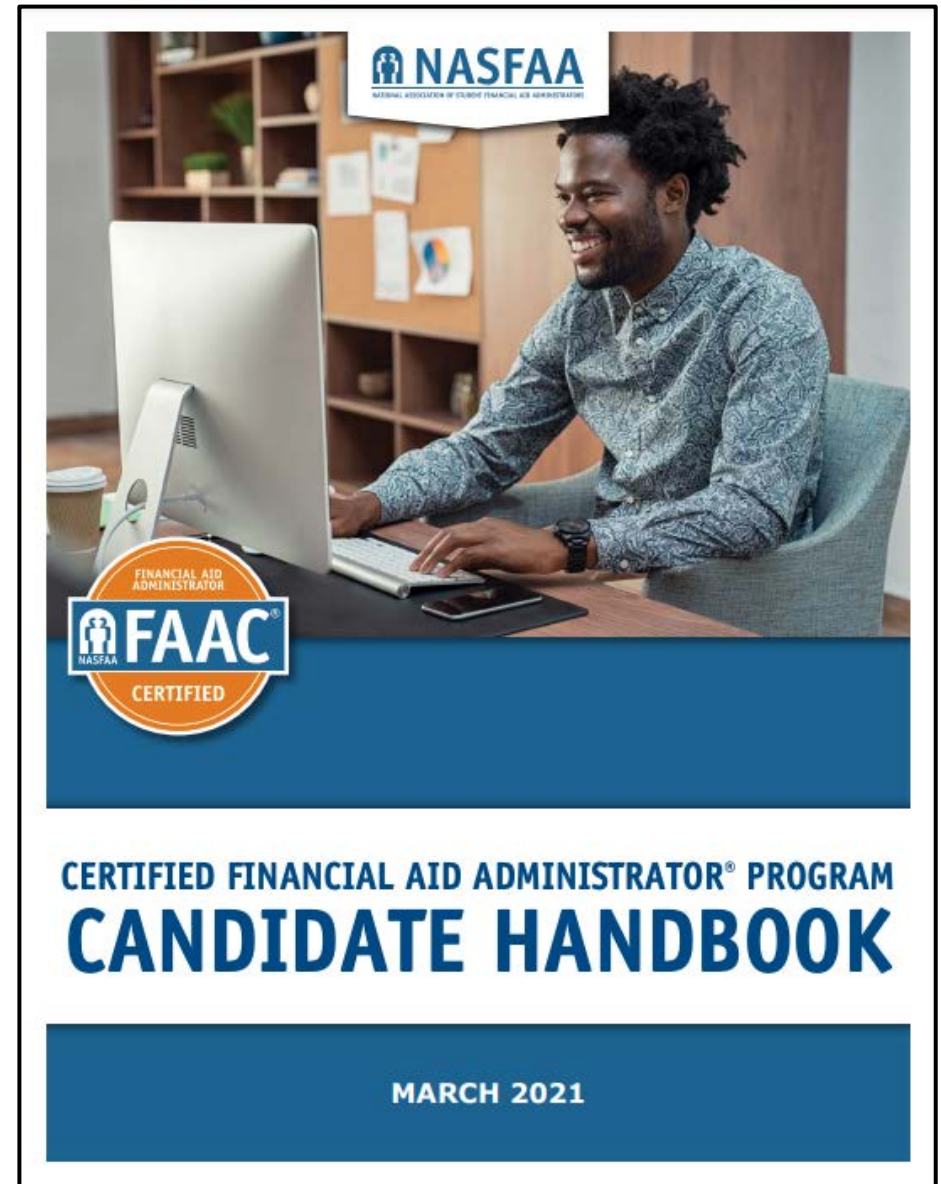
☒ Send Certification-related Correspondence to:

Business

nasfaa.org/certification_app_form

Exam Experience

- Two hours
- Proctored remotely
- Approximately 115 multiple choice questions
- Multiple testing windows
- Exam content outline available
- Core resources to help prepare



Exam Content Outline

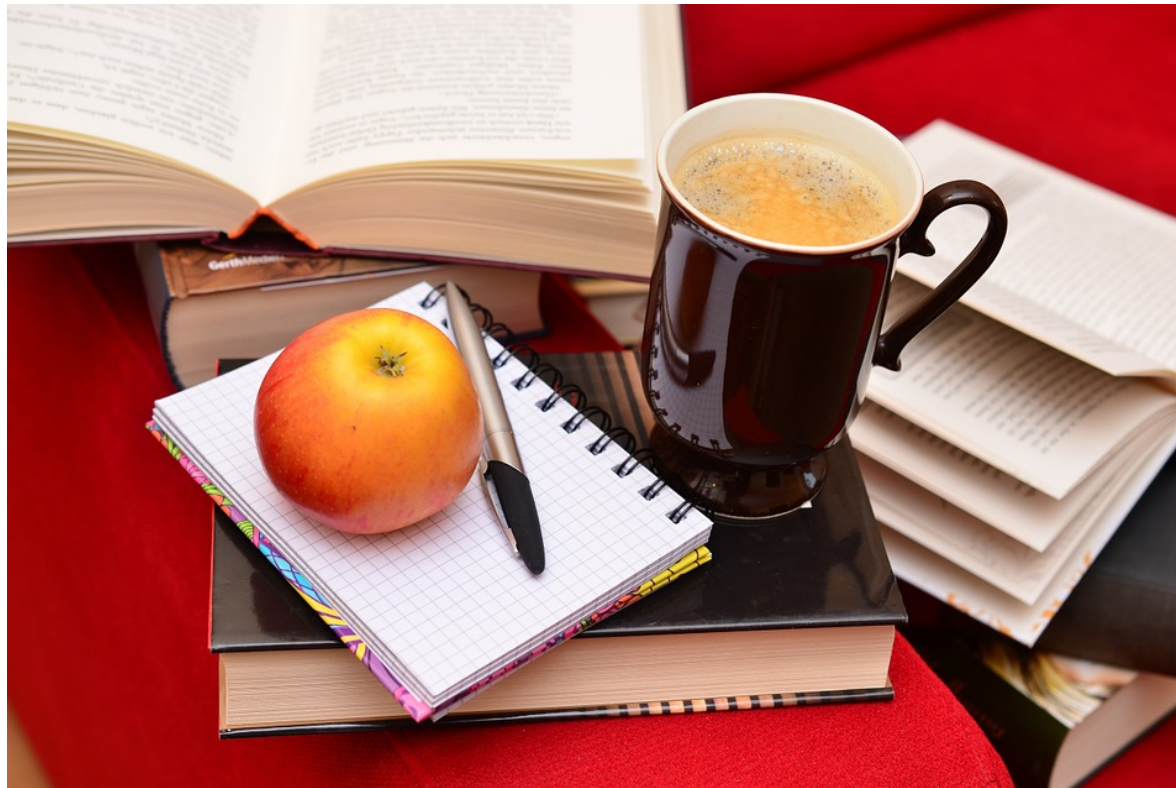
- Essential competencies
- Twelve knowledge domains

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

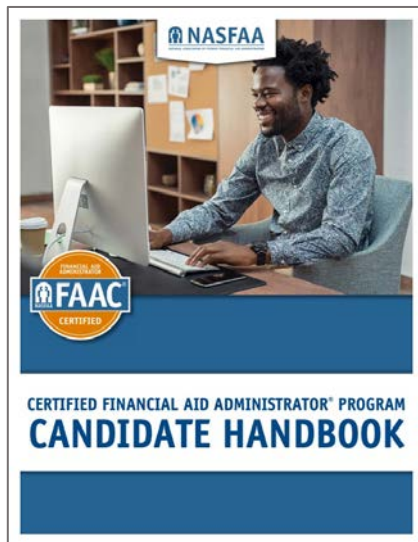


Content Area	Range
Institutional Eligibility	5-9%
Data Management	4-8%
Administrative Capability	7-11%
Consumer Information	5-9%
Cash Management	5-9%
Student Eligibility	9-13%
Cost of Attendance and Need Analysis	9-13%
Awarding and Packaging	7-11%
Verification	7-11%
Return of Title IV Funds	7-11%
Satisfactory Academic Progress	6-10%
Professional Judgment	5-9%

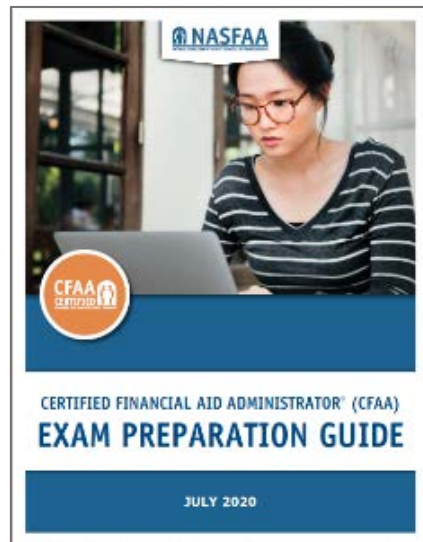
Preparing for the Certification Knowledge Exam?



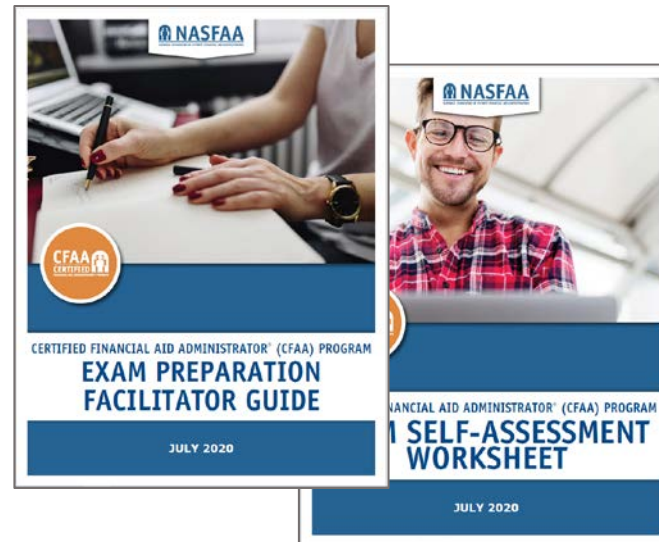
Resources



Complimentary



Complimentary
until June 30, 2022



Available through
regional associations



Available to FAACs
as of March 8, 2021

NASFAA Professional Credentials



- 16 topics
- Demonstrate depth of knowledge
- Multiple choice questions
- 90 minutes
- Multiple pathways
 - NASFAA Self-Study Guide
 - NASFAA U Online Course
 - Professional Experience
 - NASFAA Authorized Event



Remote Proctoring

- Exam security
- Flexibility for candidates
- Reduced costs

A Letter to Your Manager

Certified Financial Aid Administrator® Program

[Date]

Dear [First Name]:

I would like to pursue professional certification through NASFAA's Certified Financial Aid Administrator® Program. This program certifies individuals with proficiency in the body of knowledge pertaining to administering federal (Title IV) financial aid and its interaction with state and private financial aid.

This certification is a professional development opportunity that will benefit my career and add value to our office and our institution. The FAAC® designation recognizes the integral role financial aid administrators play in an educational institution's overall success and provides an added layer of credibility.

nasfaa.org/certification_justification

Recertification

Must recertify every three years from original exam pass date

- First cohort will need to recertify by June 15, 2022
- No exam needed to recertify

Earn at least 60 RPs through continuous learning and professional growth activities

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Certification

AskRegs

NASFAA U

Recertification Point (RP) Activities

Certification maintenance is required for all FAACs to encourage continued learning and professional development, and to promote continued advancement of knowledge and higher levels of excellence in financial aid administration. A minimum of 60 Recertification Points (RPs) must be earned within the three-year recertification period, unless the candidate is approved for inactive status. Candidates must be prepared to submit documentation to validate qualifying recertification points, as outlined below.

The RP activity categories are outlined below:

- Financial Aid Related Training
- Attendance at Professional Conferences
- Advanced Degree(s) and Coursework
- Leadership, Engagement and Recognition
- Speaking and Instruction
- Authorship
- Advocacy

Remember to track your RPs in your [Dashboard](#) after the activity has occurred.

Financial Aid Related Training	Point Value	Required Documentation
Credential Earned (during the re-certification period)	10/credential	Credential Certificate
Institute/Bootcamp (Federal/State/Regional/Industry week-long immersive training)	10/event	Registration Confirmation/Event Program/Certificate of Attendance
Fundamentals of Student Financial Aid Administration (FSA)	10/event	Registration Confirmation/Event Program/Certificate of Attendance
NASFAA U Online Courses (successful completion required)	8/course	Results tracked within NASFAA database
NASFAA's Blue Icon Advisors New Director Group Coaching and Aspiring Director Group Coaching	5/course	Results tracked within NASFAA database
NASFAA Authorized Event Workshop (Independent of an Institute/Bootcamp)	3/topic	Registration Confirmation/Event Program/Certificate of Attendance

www.nasfaa.org/certification_rps

Strategies for Earning Enough Recertification Points (RPs) to Recertify Every Three Years

challenge

Credentials and Certification



Community



Credibility

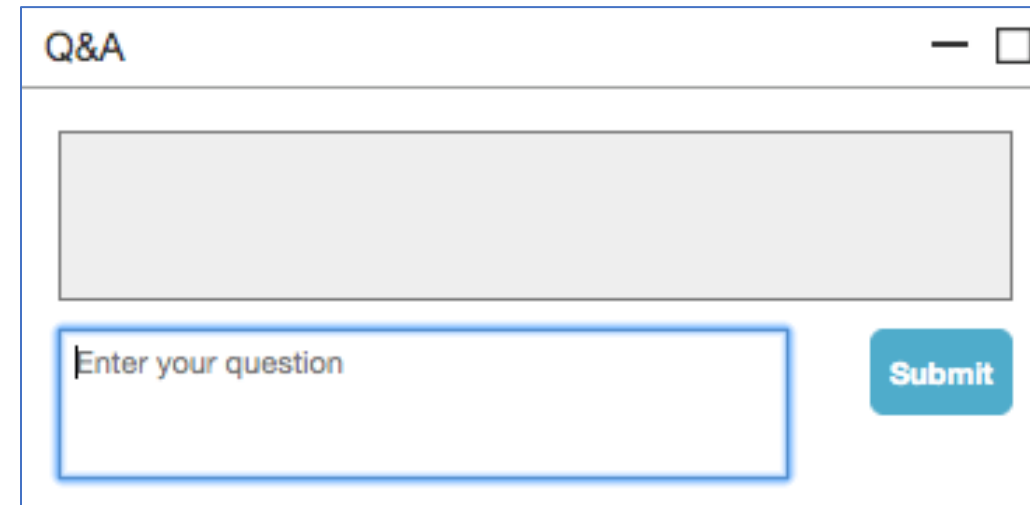


Continued
Learning



Questions?

- Submit your questions using the Q&A
- Email certification@nasfaa.org

A screenshot of a web form titled "Q&A" in the top left corner. The form has a title bar with a minus sign and a close button. Below the title bar is a large, empty rectangular text area. At the bottom of the form, there is a smaller text input field with the placeholder text "Enter your question" and a blue "Submit" button to its right.

Q&A

Enter your question

Submit

Opportunities to Earn Recertification Points

NASFAA Webinar

Graduate and Professional School Town Hall 2021-22

March 16, 2022

2:00 p.m. ET

NASFAA U Online Course:

Cash Management

Begins March 15, 2022 (Four-week interactive online course)

CFAA

**NASFAA CERTIFIED
FINANCIAL AID ADMINISTRATOR®**



Texas Higher Education Coordinating Board

Texas Reskilling Support Fund Grant Program

Sheri Ranis, Assistant Director, Workforce Education Division

February 2022

Texas Reskilling Support Fund Grant Program

Funding Source:

- Stems from the allocation of \$175 million provided to the Texas Higher Education Coordinating Board (THECB) from the Governor's Emergency Educational Relief (GEER) Fund.

Purpose:

- Provide emergency support to students who have been impacted by the COVID-19 pandemic.
- Provide financial assistance to Texas students pursuing a credential of value through coverage of student tuition and fees and cost of attendance

Reskilling Funding Focus

Reskilling Grants are designed to support:

- Displaced Texas workers who need to reskill or upskill to get back into the workforce.
- Texas students who have stopped out of higher education institutions without completing a postsecondary credential.

Reskilling Program Highlights

Reskilling Program to date:

- \$37.8 million in financial aid support through GEER funding made available to public and private institutions in Texas including HRIs
- Three rounds of competition
- 82 grantees as of December 2021
- Grantees in every Higher Education region in Texas
- 35 two-year institutions
- 30 four-year institutions
- 2 Health-related Institutions

Eligible Credential Programs

High-Value Short-Term Workforce Credential Programs:

- High-value short-term workforce credential programs (fewer than 60 SCH).
- Credential programs converted to credit or stackable to credit-bearing programs, Level 1 Certificates, Level 2 Certificates, Level 3 Enhanced Skills Awards, and Advanced Technology Certificates.
- Eligible high-value workforce credential programs must align with high-value occupations:
 - In the region as determined by the most recent TWC Target Occupations regional list.
 - That offer above-average wages and demonstrate strong job placement for the region as determined by the institution.

Undergraduate and Graduate Degree Programs:

- Associate, Baccalaureate, Post-Baccalaureate, Masters, Doctoral, and Post-Doctoral programs that represent high-value.



Student Eligibility

Eligibility criteria:

- Texas residents eligible for in-state tuition (residency determined by institution);
- Must file a Free Application for Federal Student Aid (FAFSA);
- Eligible for federal Title IV aid. Students who are enrolled in short-term ineligible Title IV workforce credential programs but who are otherwise Title IV eligible may be included;
- Students impacted by COVID-19. Institutions may establish their own processes for determining COVID-19 impact;
- Enrolled in an eligible academic degree program or short-term workforce credential program as described in this RFA on either a full time or part time basis; and
- Not enrolled in an accredited postsecondary institution in the previous academic (long) semester or previous six months.



Student Awards

- Tuition and fees, after any state, or institutional gift aid the student has received.
 - “Middle dollar calculation” that excludes federal aid students receive.
- Institutions may allocate up to \$500 of an award for supplemental expenses defined as the cost of attendance as determined by the institution.
- Grantee institutions may award up to \$500 to eligible students without consideration of need.
 - Awards beyond \$500 must be based on student financial need.
- Must not exceed an eligible student’s demonstrated financial need.
- Capped at \$2,500 per student per semester/term.

Reskilling Additional Features

Funding for Marketing/Outreach:

- Up to 10% of the total grant amount may be used for marketing and outreach.
- Grantees that exercise this option provide the THECB Communications team with their marketing/outreach plans.

Research and Information Sharing:

- Grantee workshop series on outreach to adult students, marketing financial aid opportunities and managing federal grants.
- Grantee reporting at the student level will provide greater understanding of trends for reskilling/upskilling populations as well as credentials of value.

Frequently Asked Questions

Selected FAQs

- Do students have to meet the Satisfactory Academic Progress (SAP) for financial aid?
- Can CE students receive aid?
- Do non-credit students have to fill out a FASFA in order to get funding?
- Are eligible students able to continue to receive aid following their first semester of funding?

Texas Higher Education Coordinating Board

Dr. Sheri H. Ranis

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Texas Higher Education Coordinating Board

SFAP Strategic Initiatives

Charles W. Contéro-Puls, Ed.D., Assistant Commissioner

March 3, 2022

THECB Strategic Architecture

Outcome Goal

- **Talent Strong Texas:** Equitably fostering the skills and spurring the innovation vital to the Texas economy

Financial Aid Strategic Priority

- **Expand Access:** Leverage financial aid to remove barriers to student enrollment, improve affordability, and enhance value with financial aid.

Randomized Controlled Trial

Financial Aid Pilot Programs

- **GEER funding:** This one-time federal funding presents a unique opportunity for Texas to pilot novel, innovative approaches to provide financial support to critical student populations.
- **Texas Transfer Grants:** Provide portable need-based aid to high-achieving transfer students who are low-income to help mitigate financial barriers to vertical transfer for students.

Technological Infrastructure

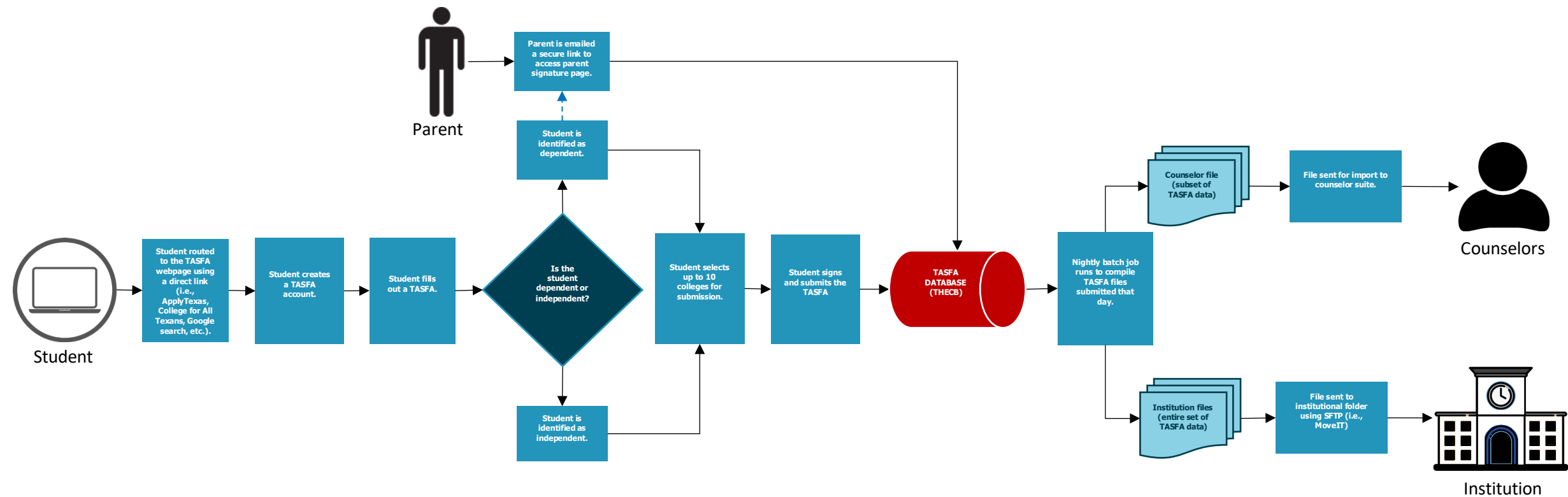
Infrastructure Goals

- **Stakeholders First:** How do we best serve the citizens of Texas?
- **Re-Engineer:** Challenge our conventional thinking and improve the administration of existing financial aid programs.
- **Flexible:** Support our ability to quickly stand-up novel, innovative approaches to targeted financial aid.
- **Adaptable:** Support agency-wide use.

Thank You!

TEXAS APPLICATION FOR STATE FINANCIAL AID (TASFA)

SUBMISSION FLOW CHART



AGENDA

FAAC Data Collection Sub-Committee Meeting

Feb. 24, 2022: 10:30am–12:30pm

Location: Microsoft Teams meeting

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

+1 737-222-7309 United States, Austin

Phone Conference ID: 755 699 597#

<p>Update on Online TASFA</p> <p>This topic will provide an update on the progress of the online TASFA.</p> <p>Update:</p> <ul style="list-style-type: none">Released a new promotional flyer<ul style="list-style-type: none">On track with getting a consumable file to the schools for the launch in Oct. 2022Will send the flyer out the school districtWill be building a dedicated webpage for TASFAUser Testing<ul style="list-style-type: none">This can be a little tricky with external users but will continue to working with the schools to do some file testing.Online files will go to MOVEitWorking on promotional opportunities <div>Online TASFA</div> <p>Updates</p> <ul style="list-style-type: none"><ul style="list-style-type: none">Continuing TASFA programmingTesting in progressCollaborating with vendors and the TASFA workgroup on file layoutSetting up institutions in MoveitCommunication about online TASFA sent to institutions and school districts <p>Committee Comments:</p> <ul style="list-style-type: none">Would like more ways for file open like CSV because fixed-length is challengingWould like to download the pdf version than a spreadsheetNeed to understand the required signature for students and parents	<p>Virtual Meeting- Leah S.</p>
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	<p>Update on FAD Data Modernization</p> <p>This topic will provide a quick update on the progress made on the modernization project and the user access testing (UAT).</p> <p>Update:</p> <ul style="list-style-type: none"> • Still on target to go live for 2021-22 cycle 2 FAD. • Provide system demonstration: Financial Aid Data Submission Portal Training - DeCha Reid's Copy for FAAC Sub-Committee.pptx <p>Committee Comments:</p> <ul style="list-style-type: none"> ○ Hope that the report processing time is not as lengthy as the current process which is 12-24 hours. ○ Would like to have the FAD manual explain the new submission process ○ Want to know when the committee members can begin testing the new data submission process 	Virtual Meeting-DeCha R.
	<p>Update on Office of SFAP:</p> <p>This topic will provide an update on the activities happening in the Office of Student Financial Aid Programs.</p> <p>Topics of Discussion:</p> <ul style="list-style-type: none"> ○ Grant Payment Portal Update for B.1.10 Additional Funds ○ Program Guidelines ○ Apply TX with Selective Service ○ Texas Transfer Grant <p>Update:</p> <ul style="list-style-type: none"> ○ Grant Payment portal has not been updated with the new allocations from B.1.10 strategy. The programming to add the allocations was more complex than expected given the current system limitations, therefore we are planning on an alternative approach with a online request form to disburse the funds. We are in the testing phase of the form and the goal is to release by next week. ○ 2022-23 Program guidelines are in progress and the expected date to release is in early May. There are a few rule changes that are up for approval with the THECB Board that have an impact on the release of the guidelines. ○ Apply TX with Selective Service; There was a proposal to add the selective service status statement within the ApplyTX application. After further review of the request, several key items were identified: <ul style="list-style-type: none"> ○ The legality of adding the Selective Service Statement to ApplyTexas. Placing a Selective Service Statement on an admissions application could be perceived by students, parents, and counselors as an indication that their acceptance will be based, 	Virtual Meeting-Leah S. and DeCha R.

in part, on their Selective Service status. Regardless of how much language is added to the statement to explain that it is only related to financial aid, there will be people who do not read the caveats and act based on the idea that admission to institutions in Texas is based on Selective Service registration.

- Adding selective service statement as an approach strictly for collecting this statement would not be the best approach. Not everyone goes through the ApplyTexas system to be admitted. Nor is everyone required to be registered in their first year of enrollment. As well, not everyone intends to apply for financial aid when they are completing the application process.
- Lastly, the status statement can't be made mandatory, since certain individuals are automatically exempt from having to complete the statement.

Since the proposal is about financial aid eligibility, rather than admissions eligibility, ApplyTexas is not the best platform for collecting this type of statement. THECB believes that the collection of the status statement is best handled at an institutional level rather than on an Admission application.

- **Texas Transfer Grant Pilot Program.** This is a unique opportunity for Texas to test an innovative approach that provides financial support to a critical student population sponsored through the state's additional investment in the federal Governor's Emergency Education Relief funds. The purpose of this pilot program is to assist students who are transferring from a public 2-year institution to a public university or Health Related Institution (HRI) in Texas. Texas public universities and HRIs are required to complete an Interagency Contract with the THECB to participate in the program. There are a few more details that the agency is working out that is placing a delay on emailing the Interagency Contracts (IAC) to the schools. We are hoping to move forward with sending out the IAC's soon. More information will be announced once all the details are finalized.
- **Recent Memos:**
 - 1/12/22 Institutional Calendar available under Stay Connected
 - 1/14/22 Award Amounts released for TEXAS Grant and TEOG
 - Includes the priority EFC which is \$6,454

Type of Institution	TEXAS Grant	TEXAS Grant Target Amount	TEOG
Public Universities & Health Related-Institutions	\$5,379/semester	\$2,500/semester	-
Public State Colleges	-	-	\$1,533/semester
Public Technical Institutes	-	-	\$3,979/semester
Public Community Colleges	-	-	\$1,707/semester

- 2/22/22 Opt In/Out released with deadline of March 11

	<ul style="list-style-type: none"> o EAE o TCWS o WSMP o TEG not collected since it was already done last year for the biennium <ul style="list-style-type: none"> o Upcoming Memos <ul style="list-style-type: none"> o FADs FY 2022 opening 2/23/22 - Cycle One is delayed due to system issues. An announcement will be sent shortly. Currently the deadline remains at April 11 o User Access - looking at ways to improve the process of collecting changes. o NPC - Still awaiting the updated template from the Department of Education for 2020-21 award year. We will send out the information once it's available for upload o Title III Waiver: 2021-22 letters are collected by the THECB for compliance purposes o Upcoming deadlines: <ul style="list-style-type: none"> o Good Neighbor Deadline - opened up 2/2/22 and closes 3/15/22 o FAAC Nomination - March 11 o State Financial Aid Opt in/out - March 11 o TEG Engagement Report - Deadline is April 15 <ul style="list-style-type: none"> ▪ Email report to DeCha and include the Corrective Action Report, if needed <p>Committee Comments:</p> <ul style="list-style-type: none"> o Would like to have the law change for selective service so it can be easier to navigate with the multiple state applications. o Would like to know if there are any reporting requirements for the Transfer Grant since GEER funds are funding the pilot program. o Looking forward to having an alternative approach to request the B.1.10 funds. 	
	<p>Discussion Topic: Authority to Transfer Process</p> <p>This topic will discuss the challenges of navigating the Authority to Transfer Process and gather some feedback on how to improve the overall customer experience.</p> <p>Update:</p> <ul style="list-style-type: none"> • The Authority to Transfer form will be created in an online application version to lessen the burden of using the CRAFT system for a request. <p>Committee Comments:</p> <ul style="list-style-type: none"> o Make the request form also a form to complete at the time o The timing of the Authority of Transfer; can there be a reminder up front and use FAD data from cycle one to help schools reconcile their TCWS program. 	Virtual Meeting-Tanita C.

	<ul style="list-style-type: none"> Reimbursement of TCWS instead of one lump sum because transferring of funds back to the agency is a hassle. 	
	<p>Discussion Topic: FAD Certification Process (Errors and Reconciliation)</p> <p>This topic will discuss the challenges of navigating the process to certify FAD and gather some feedback on how to improve the overall customer experience.</p> <p><u>Suggested FAD Changes</u></p> <ol style="list-style-type: none"> Issue: Penny rounding of WS <ul style="list-style-type: none"> Solution1: Allow a \$100 threshold for penny rounding per institution. This is an allowable resolution. Solution 2: Allow reporting of cents. This is a system limitation and unable to make programming changes to this. Having to report manually and online the increase/decrease of student count for TEXAS Grant <ul style="list-style-type: none"> Solution: Only require one mechanism, not two, to report change. This is under review to change the entire reconciliation process to make it simpler and easier to navigate. Why does it take over 12 hours to get the notice we can certify FADS from the point we receive from the CB a final reconciliation report with no errors indicated? We will research the processing time, as it should not take that long of a period. When the new submission portal is launch, it will the processing time will be cut down tremendously. After reconciliation email and there was no email that notified that there were no-error message. The step of "Reconcile Programs" only affects the columns in the FADS that have the student data for the given state program and does not affect all the other FADS columns that may have errors. Can "Reconcile Programs" occur before all errors are resolved or even same time since both processes are resolving different types of errors and both can take significant time to clear? We encourage administrators to resolve the student level errors since there are times when reconciliation may be impacted, however administrators can determine the best approach to resolving all errors. Currently we have to wait until all errors are resolved before we submit the Grant Reconciliation Form and begin that process. This is under review to change the entire reconciliation process especially how grants are reconcile. <p>Committee Comments:</p> <ul style="list-style-type: none"> Agreed with all of the suggestions especially for allowing a threshold for Texas College Work-study and Mentorship. 	<p>Virtual Meeting-DeCha R., Tanya T., and Tanitia C.</p>

	<ul style="list-style-type: none"> ○ No error notification message being sent which caused a delay with certifying ○ Summer header schools have issues with loans and reconciliation ○ Reconciliation form make it simpler to navigate ○ Look at the reporting process for loans 	
	<p>Discussion Topic: FAS Webcast</p> <p>This topic will gather feedback from the committee to collect ideas to cover during the monthly FAS webcast.</p> <p>Committee Comments:</p> <ul style="list-style-type: none"> ○ Will send in suggestions; none given at the time. 	Virtual Meeting- Leah S.
	<p>Discussion Topic: Future Topics</p> <p>Engage the committee in discussion on what topics they would like to see covered in future meetings.</p> <p>Committee Comments:</p> <ul style="list-style-type: none"> ○ Will send in suggestions; none given at the time. 	Virtual Meeting- Dede G.