Financial Aid Advisory Committee (FAAC)

Time of Meeting: December 8, 2022
Location: Virtual Meeting

Texas Higher Education COORDINATING BOARD

AGENDA

12-8-2022

I. Welcome, Introductions and Overview of Meeting- Rachelè Garrett, Chair

II. Consideration of Approval of Minutes from the meeting held on September 8, 2022- Rachelè Garrett

III. Presentation: Work-Based Learning Overview-Vanessa Malo, Assistant Director, Workforce Education, THECB

IV. Presentation: State of Student Aid and Higher Education in Texas (SOSA) Jeff Webster, Director of Research and Carla Fletcher, Senior Research Analyst, Trellis

V. Presentation: More FAFSA Completions, with better reporting - all for free- Charlie Maynard, General Manager, Going Merry

VI. Presentation: Top 10 Issues Impacting Financial Aid Offices-Karen McCarthy, Vice President of Public Policy, and Federal Regulations, NASFAA

VII. Update: Prior FAAC Business-DeChá Reid, Senior Director, SFAP, THECB

VIII. Update: External Relations- John Wyatt, Senior Director, External Relations, THECB

IX. Update: THECB Financial Aid Strategic Priority- Charles Conterò-Puls, Assistant Commissioner, THECB

X. Update: TASFA Subcommittee: House Bill 3 (FAFSA/TASFA Graduation Requirement) and House Bill 2140 (On-line TASFA); – Bridgette Ingram, Subcommittee Chair, Claudette Jenks, Director, Strategic Advising; and Leah Smalley, Assistant Director, THECB

XI. Update: Data Collection Subcommittee- Dede Gonzales, Subcommittee Chair

XII. Update: Legislative Subcommittee- Arnold Trejo, Subcommittee Chair

XIII. Update: Texas Association for State Financial Aid Administrators (TASFAA)- Dede Gonzales, TASFAA President

XIV. Update: High School District- Lisa Schoenbrun, El Paso ISD; Shonna Norton, Wichita Falls ISD

XV. Update: Office of Student Financial Aid Programs- DeChá Reid, Senior Director, THECB

XVI. **Discussion Topic:** 2022 FAAC Annual Report – DeChà Reid, THECB

XVII. **Discussion Topic:** NASFAA's SAI Modeling-Rachelè Garrett, Chair

XVIII. **Discussion Topic**: 2023 FAAC Meeting Dates and Location, Rachelè Garrett, Chair

XIX. Discussion Topic: Feedback for Future Meetings- Rachelè Garrett, Chair

XX. Adjournment- Rachelè Garrett, Chair

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

Committee Members in Attendance Via Virtual Meeting Connection		Committee Members Absent
Rachelè Garrett, Chair Denise Welch, Past Chair DeChá Reid, THECB Rep Jackie Adler Reginald Brazzle Victoria Chen Bridgette Ingram Cecelia Jones Rachel Joseph-Student Rep Melet Leafgreen Gaby Leon Scott Lipinski Lynda McKendree Robert Merino, TASFAA Rep	Holly Nolan Shonna Norton Sal Ramirez Thomas Ratliff Joseph Ruiz Joseph Sanchez Lisa Schoenbrun Tevian Sides Gilbert Zavala	DeDe Gonzales Arnold Trejo

Agenda Item 1. Welcome, Introductions and Overview of Meeting	**Rachelè Garrett, Chair**
Handout Provided: Yes	**Formal Decision/Action Required** No
Summary: **See handout for agenda item 1 for more information	

Agenda Item 2. Consideration of Approval of Minutes from the meeting held on June 2, 2022	**Rachelè Garrett, Chair**
Handout Provided: Yes	**Formal Decision/Action Required** Minutes approved
Summary: • No corrections were identified. **See handout for agenda item 2 for more information.	

Agenda Item 3. Presentation: When your "Business" impacts your "Business"	**Lou Murray, Southwest/Rocky Mountain Regional Lead for Earnest**
Handout Provided: Yes	**Formal Decision/Action Required** No
Update Summary: **See handout for agenda item 3 for more information.	

Agenda Item 4. Update: Prior FAAC Business	**DeChá Reid, Senior Director, THECB**
Handout Provided: No	**Formal Decision/Action Required** No
Presentation Summary: • **None**	

Agenda Item 5. Update: External Relations	**John Wyatt, Senior Director, External Relations, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Update Summary:
 	
• Now and the start of the Legislative session there will be more interim hearings.
• Hearings with the House-Commissioner Keller will present on Affordability and Accessibility in Higher Education
• Agency is looking for $153 million dollars to support financial aid programs (three grant programs) to support the same eligible students from the current biennium (same service level); requested state general revenue funding to support new programs:
  ○ Transfer Grants
  ○ Texas Leadership Scholarship Program
• Texas Commission on Community College Finance	

DRAFT

Prepared: 9/28/2022 / Finalized: xx/xx/2022
Lourdes Sanchez

- The commission is to help improve the finance of community colleges; a draft from then commission is to increase funding in TEOG to support the same student percentage in TEOG as does Texas Grant; greater flexibility of TEOG; new state financial aid program to cover tuition and fees in dual credit; expanding partnerships for paid workforce programs (work-study); final report in Jan 2023.
- Agency will not adopt a formal policy agenda for the Legislative session; we will work with institutions and other stakeholder to make the best decision possible on higher education.
- Tough to say what will be the hot topics for the Legislative session but will know more in December when the bills start being filed.

Agenda Item 6. Update THECB Financial Aid Strategic Priority	**Charles Conterò-Puls, Assistant Commissioner, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Presentation Summary:

- Remove barriers and enhance value
- Appreciate the survey participation of the FAAC of the FA Strategic Priority
- The survey revealed some areas that the agency believed would be the needs of the FA Community; still looking through survey results
- More to come as the agency continues to work through the structure of expanding access; multi-years to achieve the goal.
- Another area funded through GEER funds is the Transfer Grant program, looking potentially providing spring 2023 grants to recipients but will need the reimbursement rosters to make that determination since enrollment is key to making additional funds available.
- Technological Infrastructure is another key are that GEER funding is supporting. One item we were hoping to go live with new technology was for the Transfer Grant. However, the agency realized that another alternative plan was necessary to start the reimbursement process, but the agency will continue to work on our project timeline for updating our technology.

Agenda Item 7. Update: TASFA Subcommittee: House Bill 3 (FAFSA/TASFA Graduation Requirement) and House Bill 2140 (On-line TASFA)	**Bridgette Ingram, Subcommittee Chair, Claudette Jenks, Director Strategic Advising; and Leah Smalley, Assistant Director, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Update Summary:

- Update on the online TASFA
  - The agency sent an announcement to IHE" s on August 28,2022, regarding the delay of the online tool
  - Encouraging students to complete the paper TASFA which will be available Oct 1st.
  - Test files are in the progress and the agency is committed to deliver the test files to IHE's along with providing resources and training.
  - The online TASFA will be launched this 2022-2023 academic year.
  - The 2023-2024 paper TASFA draft will be released the week of Sept 12th; the fillable version both English and Spanish will be released on Oct 1st.
  - There were some updates to the paper version:
    - Annual Updates to years and dates
    - Annual updates to tax and income Internal Revenue Service (IRS)references.
    - Questions were reorganized to align with the development of the future Online TASFA.
    - Proof of Selective Service registration is no longer required and was removed from the Selective Service Statement of Registration Status Form
    - Removal of TASFA questions (refer to 2022-23 award year version)
      - Date of Graduation (HS or GED) #17
      - College grade Level #19
      - Degree/Certificate Attempting #20
      - Number of credits/hour enrolled #22
      - Associate degree for transfer students #23
      - Conviction restrictions #25
      - Previously received state aid #26
      - Work authorization and work-study interest #27

Agenda Item 8: Update: Data Collection Subcommittee	**DeChà Reid, Senior Director, THECB**
Handout Provided: Yes	**Formal Decision/Action Required** No
Update Summary: Update given by DeChá Reid on behalf of Dede Gonzales **See handout for agenda item 8 for more information.	

Agenda Item 9. Update: Legislative Subcommittee	**Arnold Trejo, Subcommittee Chair**
Handout Provided: No	**Formal Decision/Action Required** No
Update Summary: o No update provided	

Agenda Item 10. Update: Texas Association for State Financial Aid Administrators (TASFAA)	**Robert Merino, TASFAA President**
Handout Provided: No	**Formal Decision/Action Required** No
Update Summary: • Email the House of Education Committee on updating the SAP Selective Service, and Felony to align with the federal requirements • Fall 2022 Conference for October o 204 are registered for the conference and 33 to the New Aid Officer Workshop o Waive late registration fees	

Agenda Item 11. Update: High School District	**Lisa Schoenbrun, El Paso ISD; Shonna Norton, Wichita Falls ISD**
Handout Provided: No	**Formal Decision/Action Required** No
Update Summary: • Great disappointment that the online TASFA was delayed but excited when it will launch.	

Agenda Item 12. Update: Office of Student Financial Aid Programs	**DeChà Reid, Senior Director, THECB**
Handout Provided: Yes	**Formal Decision/Action Required** No
** See handout for agenda item #12 for more information	

Agenda Item 13. Discussion Topic: Department of Education Fresh Start Letters- Denise Welch, Past Chair	**Rachelè Garrett, Chair**
Handout Provided: No	**Formal Decision/Action Required** No
Discussion Summary: • Bridgette: Created a form for the fresh start, happy to share with the committee; received a few letters, only have eight students in 2022-2023 and created a report to identify other students. • Rachelè: Only had one student that was impacted and plan to meet about the process. The timing was during announcement of Loan Forgiveness and was still working through those calls. • Scott: Received one student before the guidance came out and created their own form to work through the guidance. • Robert: Had about ten students and working through a report to identify more students; created a form. Notices that students are requesting more funds once they have been refreshed, require a student to request the maximum amount then plan to meet for next year. • Melet: Received two students to refresh and noticed that the messaging has not been accurate or aligned with what the Department of Education. • Thomas: Only received one letter and checked NSLDS and could not locate the student was on default. There have been some issues with NSLDS reporting that could be impacting the student. • Lynda: Experiencing students are meeting the aggregate loan limit or have little availability remaining. • Gilbert: Is there a solution to resolve the default that impacts the students that are being refreshed.	

Agenda Item 14. Discussion Topic: Appointing a New FAAC Vice Chair	**Rachelè Garrett, Chair**
Handout Provided: No	**Formal Decision/Action Required** Yes, Motion Passed
Discussion Summary • Melet Leafgreen was nominated and voted as Vice Chair.	
Agenda Item 15. Discussion Topic: Feedback for Future Meetings	**Rachelè Garrett, Chair**
Handout Provided: No	**Formal Decision/Action Required** No
Discussion Summary • SAI from the State perspective • 2024-2025 Academic year • Presentation on Diversity and Inclusion on Education Equity • More information on the Texas Community College Commission • Top ten FA Items-NASFAA presentation • Presentation on FAFSA and Scholarship- Sal Ramirez • Presentation on the perspective from students	
Agenda Item 16. Adjournment	**Rachelè Garrett**
Handout Provided: No	**Formal Decision/Action Required** Yes
Discussion Summary • 12:20pm; Denise motion to adjourn and Victoria Second	

DRAFT

Texas Higher Education
COORDINATING BOARD

Work-Based Learning Overview

THECB

Work-Based Learning Program Staff

Vanessa Malo

Assistant Director, Work-Based Learning
Texas Higher Education Coordinating Board

Lisa Shaw

TXWORKS Internship Coordinator
Texas Higher Education Coordinating Board

Amy Dalton

TXWORKS Outreach Specialist
Texas Higher Education Coordinating Board

Agenda

- Work-based learning Overview
- Work-based learning opportunities
- Questions

What is work-based learning?

Work-based learning is…

An umbrella term used to identify activities which **collaboratively engage employers and schools** in providing structured learning experiences for students. Through these experiences, **students develop** broad, **transferable, career skills**.

Work-based learning is…

Learning about work	Learning through work	Learning at work
Career Exploration	**Career Preparation**	**Career Training**
Worksite tours; Job shadowing; simulations; informational interviews with employers	Internships; pre-apprenticeships; cooperative education; service learning	Apprenticeships; youth apprenticeships; on-the-job training; transitional jobs

THECB
Work-based learning programs

Work Study Student Mentorship Program (WSMP)

Focus: Improve and increase student access, success, completion of education goals and to provide employed WSMP students with an opportunity to gain and strengthen career readiness skills.

TXWORKS Internship Program

Focus: Provides students with opportunities to build their resumes through paid and professional work experiences aimed at strengthening their career readiness.

Work-Study Student Mentorship Program

The purpose of WSMP is to provide employment to eligible students with:

Established financial need to mentor, tutor, or advise students at participating institutions of higher education or high school students within local school districts and nonprofit organizations.

These student mentor, tutor, and advising positions are funded by a combination of state appropriations provided by the Texas College Work-Study (TCWS) Program and matching funds from participating institutions.

Work-Study Student Mentorship Program provides:

- Part-time employment to eligible students as mentors, tutors, or advisors.
  - **Wages/work requirements:**
    - minimum of **$10** an hour
    - maximum of **20** hours per week
- Training as determined by the THECB and participating institutions.
- Program oversight.
- Matching funds, including partner match.

Did you know…

"People with mentors are happier at their current jobs than those without."

- Forbes

The benefits…

- **Mentors** are 6x more likely to be promoted compared to their co-workers. (Forbes)
- **Mentees** are 5x more likely to be promoted than those without a mentor. (McCarthy Mentoring)

TX WORKS

TEXAS INTERNSHIP CHALLENGE

Supported by THECB

TXWORKS is a program that provides students with opportunities to build their resumes through paid and professional work experiences aimed at strengthening their career readiness.

TXWORKS

- **Opportunities** for meaningful, challenging, real-world work experiences.
- **Exploration** of career paths with professional development and certification opportunities as applicable.

TXWORKS

- **Work** a minimum **8** weeks and a minimum of **96** hours.
- **Earn** a minimum of **$20** per hour.

Example:

- $20 * 12hours/week = $240/week * 8 weeks = $1920/ internship period
- THECB reimburses $960 to the employer.

Employers and Interns negotiate schedules.

Employers can offer more than $20 per hour.

An Intern can work 2 consecutive periods.

TXWORKS

Internship activities are not political or sectarian in nature and with no more than 25% administrative work.

Internships can be offered face-to-face, virtually or hybrid.

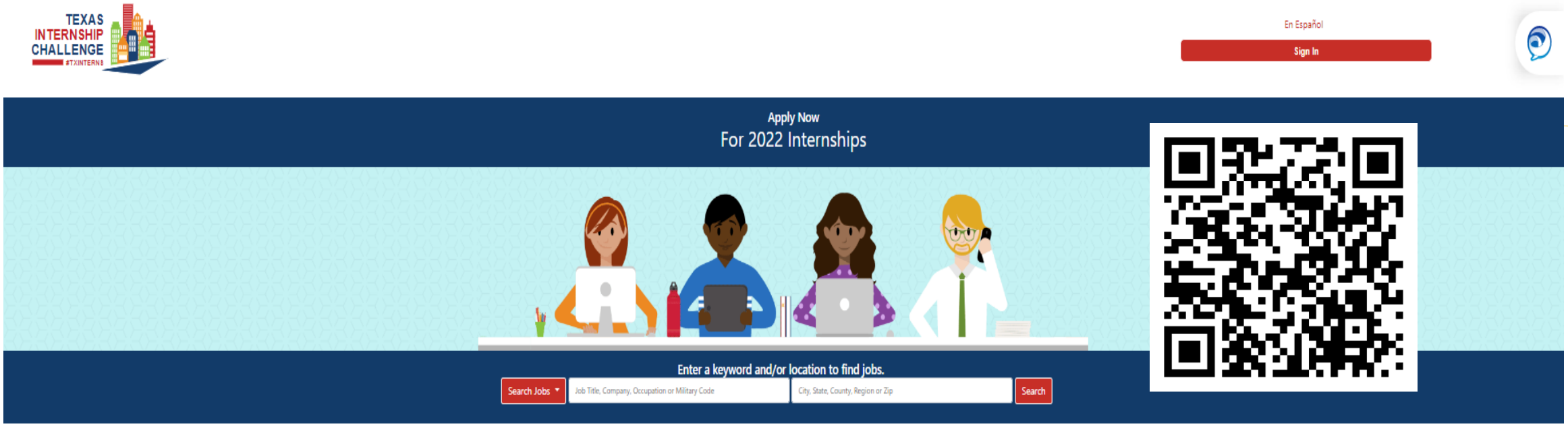
No more than 50% of the eligible employer's workforce may be interns.

How do organizations become TXWORKS Internship providers?

TXWORKS Internship Employer Steps

1. **Register** with Texas Internship Challenge
2. **Complete**
   a. Employer information form
   b. Capacity plan
   c. Submit THECB vendor documents to be reimbursed
3. **Once** the agreement is in place, implement!

Texas Internship Challenge



THECB Texas Higher Education COORDINATING BOARD

Implement

Post internship positions
Interview and hire interns
Submit Financial Report
reimburse for wages
Submit Skills Report

Career Readiness Competencies

Critical Thinking / Problem Solving
Identify and respond to needs based upon an understanding of situational context and logical analysis or relevant information.

Oral / Written Communications
Clearly and effectively exchange information, ideas, facts, and perspectives with persons inside and outside of an organization.

Teamwork / collaborations
Build and maintain collaborative relationships to work effectively toward common goals, while appreciating diverse viewpoints and shared responsibilities.

Digital Technology
Understand and leverage technologies ethically to enhance efficiencies, complete tasks, and accomplish goals.

Leadership
Recognize and capitalize on personal and team strengths to achieve organizational goals.

Professionalism / Work Ethic
Knowing work environments differ greatly. Understand and demonstrate effective work habits and act in the interest of the larger community and workplace.

Career Management
Proactively develop one's career through continual professional learning, awareness of strengths and weaknesses, navigation of career opportunities, and networking to build relationships

Global / Intellectual Fluency
Demonstrate the awareness, attitude, knowledge, and skills required to equitably engage and include people from different local and global cultures.

Source: National Association of Colleges & Employers (NACE) www.naceweb.org

Did you know…

"In the first few post-graduation years, former interns are **15% less likely to be unemployed** and earn **6% more** than students who did not intern."

- Zippia.com

TXWORKS for Students

1. **Complete** the student eligibility form.
2. **Search** for internship positions.
3. **Submit** letter of eligibility and transcripts to potential employers.
4. **Interview.**
5. **Intern**, learn skills, and build an impressive resume!

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Questions?

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Insight time…

1. Have you ever hosted a work-based learning experience?
2. Lessons learned?
3. Value add?

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Thank you!

More FAFSA® completions,
with better reporting
— all for *free*

Going Merry is a financial aid platform used by students and counselors in 2 out of 3 US high schools, including over 2,000 in Texas.

We've built a new, better FAFSA for students and counselors. It uses **simple questions with helpful tips** so students don't get stuck and offers students and parents customer service for additional support. In addition, schools have **a dashboard with real-time stats on their students' progress** through each section and question of the FAFSA.

House Bill 3 requires 100% FAFSA Completion

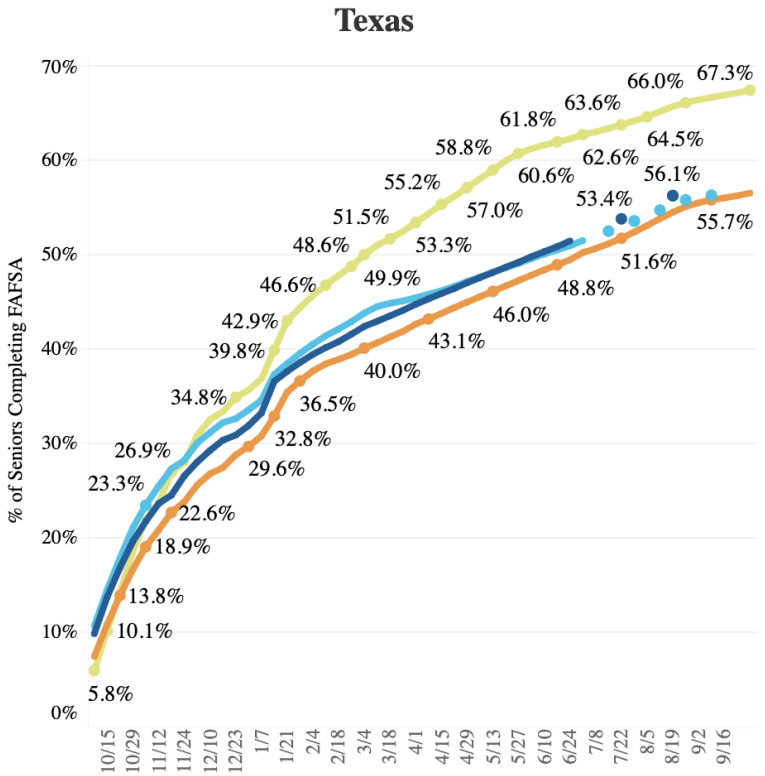
- **House Bill 3 was signed into law in 2019 and states:**

  “Before graduating from high school, each student must complete and submit a free application for federal student aid (FAFSA) or a Texas application for state financial aid (TASFA).”

- **This requirement went into effect this year**
- Understanding how to complete the FAFSA is a required TEK (Texas state standard) in the Economics course (this course is required for graduation)

Texas missed last year's target by ~30%

- Completion was up 10% year on year for the class of 2022
- **However, that was still only 67% completion**
- **Completion needs to increase nearly +50% year on year** (vs. +10% y/y in 2022, and -3% y/y in 2021)



Source: https://formyourfuture.org/fafsa-tracker/

Why is Texas unlikely to meet its FAFSA graduation requirement?

It is Hard for Students to Complete

Kids have a mentality that the form is **complicated and takes a lot of time**

First-generation and undocumented students get **confused and have little support**

Students and parents **make mistakes when they're not sure how to answer a specific question** then it's more trouble helping them fix it (or students don't tell us about them and have issues with verification)

Students **get stuck and wait a month to finish it**... I want to get them to do it earlier so it's not so stressful

Creating an FSA ID is confusing and they spend 15 mins remembering what it is each time they log in

It is Hard to Get Parents to Complete It

Parents are intimidated & confused, particularly about tax information and who should enter what in case of nontraditional families

Getting documentation from families is a nightmare

Parents are hard to get hold of / unwilling to share data / **concerned about information privacy**

We never know if a parent has signed or not

FAFSA Reporting is Poor and Inconsistent

It's hard to track each students' progress, who's stuck, who's completed it, who's signed it, etc. **If we can't track that, we can't remind them**

Tracking is a challenge in TX. Higher Education Coordinating Board gets data from Federal Government but **we have so many discrepancies**

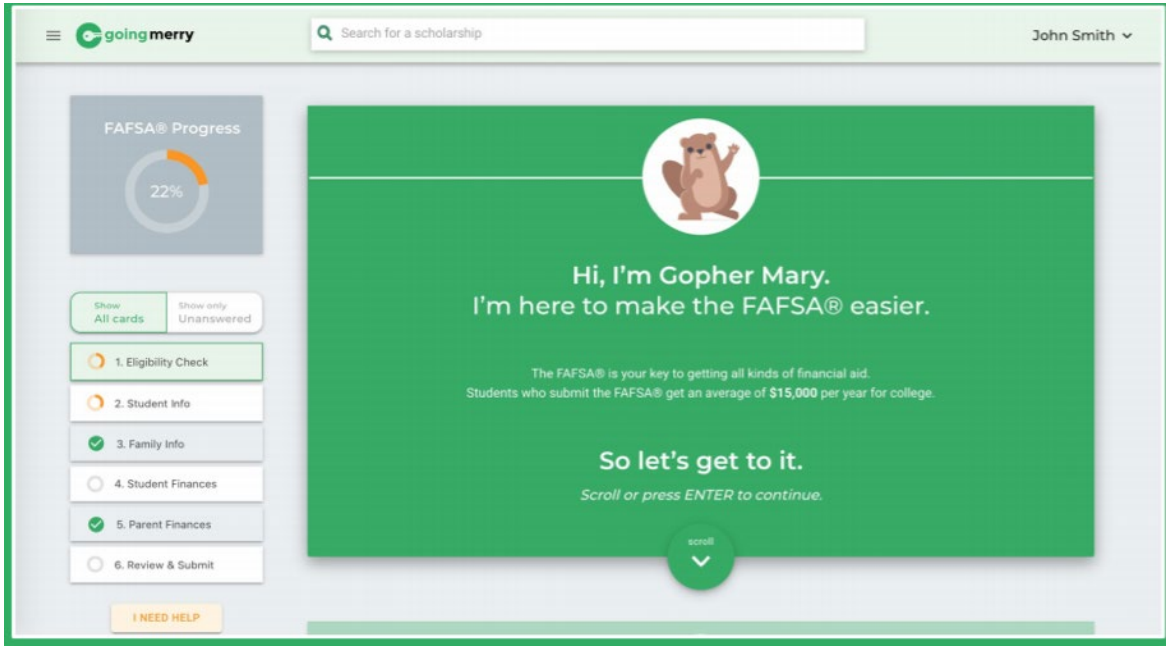
Real frustration is reporting and inconsistency between Apply Texas and Dept of Ed data

One Counselor Summarized the Challenges Perfectly

“Students hit roadblock after roadblock...
creating a FSA ID,
answering all the confusing questions,
getting documentation from their parents,
remembering to sign it (& get their parents too),
using the DRT,
going through verification,
and we can’t help as we can’t even track what they’re doing.”

How can Going Merry help?

How Going Merry helps increase FAFSA Completion



- Simpler worded questions in English and Spanish (no tax or accounting speak)
- No hidden footnotes
- Visual help answering the financial/tax questions
- Expert help and searchable FAQs
- Real-time stats for schools on students progress, question by question

Our partner schools increased their FAFSA Completion 15%

- Completion rates for Going Merry partner schools increased +15% last year, while the national average fell.
- Here's what counselors say:

"Students and families are finding the FAFSA so much easier. And it's so much easier for us too! **Going Merry handles all of their questions and issues.**"

- MaryAnn Hill, Lead Counselor
Sherman ISD, TX

"Going Merry is a game-changer. Our application rates increased significantly."

- Lisa Schoenbrun, CCMR Coordinator
Franklin High School, El Paso, TX

In a world full of unnecessary complications, **Going Merry is a breath of fresh air.** So simple & so user friendly.

- Briana Jemison, Academic Counselor
Founders Classical Academy, Lewisville, TX

"**Going Merry has been phenomenal**... it shows me each student's FAFSA progress real-time"

- Rolie Casanova, South Texas Region Counselor
ResponsiveEd Schools, TX

Source: https://www.goingmerry.com/for-administrators
https://formyourfuture.org/fafsa-tracker/

FINANCIAL AID ADVISORY COMMITTEE

ANNUAL REPORT

COMMITTEE ABOLISHMENT DATE: 10/31/2024

Committee Purpose: The Financial Aid Advisory Committee was created to provide the Board advice and recommendations regarding the development, implementation, and evaluation of state financial aid programs for college students. It also assists staff in the development of training materials for use by the Center for Financial Aid Information and others in informing students, parents, secondary education counselors, college personnel, members of appropriate community-based organizations, and others about financial aid opportunities for Texas students, including eligibility requirements and procedures for applying for financial aid (Texas Education Code Sec. 61.0776). In addition, the committee shall provide insight on state financial aid program policies and procedures (e.g. eligibility, allocations, disbursement processes, etc.); review the collection, use, and reporting of data; and identify areas of research for consideration (Texas Administrative Rules governing this committee can be found by visiting FAAC Administrative Rules and Advisory Committee Administrative Rules).

Report Period: November 2021 - October 2022

Chair: Denise Welch, Panola College
Vice Chair: Rachelè Garrett – Stephen F. Austin University
Past Chair: Ed Kerestly, Angelo State University

Committee Member Name	Position and Institution	Term Dates
DeChá Reid	THECB Representative	Not Applicable
Melet Leafgreen	Member, UT Southwestern	Nov. 2021-June 2024
Jackie Adler	Member, Texas Technical State College	Nov. 2021-June 2024
Joy Thomas	Member, Prairie View University	Nov. 2019- June 2022
Victoria Chen	Member, Texas Christian Univ	Nov. 2020- June 2023
Dede Gonzales	Member, Texas State University	Nov. 2020- June 2023
Bridgette Ingram	Member, Texas A & M Univ	Nov. 2020- June 2023
Cecelia Jones	Member, Jarvis Christian Univ	Nov. 2021- June 2023
Jace Kugiya	Student Member, UT Austin	June 2021- May 2022
Robert Merino	TASFAA Representative	Nov. 2021- June 2022
Steven Peterson	Member, Blinn College	Nov. 2020- June 2023
Holly Nolan	Member, UH-Clear Lake	Nov. 2020-June 2023
Shonna Norton	Member- Wichita Falls ISD	Nov. 2020- June 2023
Sal Ramirez	Member- El Paso ISD	Nov. 2021- June 2024
Thomas Ratliff	Member- Abilene Christina Univ.	Nov. 2019- June 2022
Joseph Ruiz	Member- Del Mar College	Nov. 2021- June 2024
Ben Bholan	Member- Arlington ISD	Nov. 2019- June 2022
Tevian Sides	Member- Western Texas College	Nov. 2021- June 2024
Arnold Trejo	Member- UT San Antonio	Nov. 2020- June 2023
Gilbert Zavala	Member- Austin Chamber of Com	Nov. 2021- June 2024

Committee Meeting Dates: All meetings were held virtually

- 12-09-2021
- 03-03-2022
- 06-02-2022
- 09-08-2022

Pending Approval

Annual Costs Expended All meetings were held virtually, which led to a reduction in annual expenses.
Travel: $0
Other: N/A

Time Commitments: 529 hours

Current Recommendations to the Board:

1. Continue to work with the Financial Aid Advisory Committee (FAAC) in providing feedback and recommendations on new initiatives when there would be an implied or real impact on state financial aid program policies and procedures. This is critical to the strengthening of student participation by removing barriers and providing access to higher education.
2. Continue to work with FAAC in seeking feedback on how the state financial aid program rules and policies could better align with federal policies.
3. Continue the work of the Data Collection Subcommittee to review procedures that impact institutions, along with the collection and use of data through institutional reporting.
4. Continue work with TASFA Subcommittee to review and streamline the electronic and paper state application (TASFA).
5. Continue to create and utilize FAAC subcommittees with subject experts to identify areas of research for consideration of topics of interests.
6. Continue to provide information regarding proposed legislative recommendations so FAAC can provide feedback on potential impact to students in high school and postsecondary education.

Summary of Tasks Completed: Over the course of the 2021-22 year, the Coordinating Board staff worked with FAAC members to discuss topics and host presentations related to state financial aid and best practices within higher education. Highlights included:

Discussion Topics:

- Proposed Amendments to Administrative Rules in Texas Administrative Code, Chapter 22
- Succession planning
- Leveraging Financial Aid
- Administering GEER: Reskilling and Upskilling
- Recruiting and Retaining students after COVID

Presentations:

- NASFAA Certified Financial Aid Administrator Program-Shannon Crossland, Chair
- Texas OnCourse Academy-Laura Brenna, THECB
- Building a Talent Strong Texas-Melissa Henderson, THECB
- When your “Business” impacts your “Business”-Lou Murray, Earnest

On key item that changed this year was the start term for new committee members. The FAAC agreed to amend the rules for the nomination cycle to allow new members to start in September. The change was based on wanting to better align a committee member start term with the state fiscal year (Sept. 1) and the ability to elect a new Vice Chairperson earlier, along with ensuring there was enough representation from all sectors outlined in the Committee Administrative Rules.

In addition, FAAC’s subcommittees actively engaged with THECB staff on several key agency initiatives and policies to help support the advancement of the agency goals and missions. Below are some highlights from the subcommittees:

Pending Approval

TASFA Subcommittee: The TASFA Subcommittee continued to work on the online and paper TASFA to improve the student and institutional experience in delivering information on state aid. A non-inclusive list of activities included:

- Working with financial aid and high school representatives on recommended changes for the paper and online TASFA structure.
- Engage stakeholders with user acceptance testing for the online TASFA.
- Held multiple trainings to provide a preview of the online TASFA process.

Data Collection Subcommittee: Data Collection Subcommittee continued to work with THECB staff on the agency initiative to improve the importing of institutional data through the Financial Aid Database (FAD) data modernization project, along with providing guidance on the following topics:

- Texas Transfer Grant Pilot program
- Collection of the Selective Service Registration Statement
- Authority to Transfer Process for grant and work-study funds
- FAD Certification process

The members of FAAC are appreciative of the Board's approval for the continuation of the committee and offer the following examples of why the FAAC is important:

- The opportunity to share information helps both the agency and the institutions make informative decisions related to financial aid concerns and challenges in higher education.
- Provides a platform to identify key services and ways to successful administer programs supporting Texas residents in the pursuit of higher education.
- Allows members representing all sectors to provide a perspective on ways to advance the state's mission and goals in Building a Talent Strong Texas.
- Provides opportunities to influence research and reporting that will provide relevant data to assist THECB and legislators when considering future proposals relevant to the support of higher education.

Committee Meeting Minutes

December 9, 2021, FAAC Meeting Minutes

Committee Members in Attendance Via Virtual 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: • Introduction of all new committee members by Denise Welch • Introduction of all current committee members **See handout for agenda item 1 for more information		
Agenda Item 2. Consideration of Approval of Minutes from the meeting held on Sept. 2, 2021		**Denise Welch, Chair**

Pending Approval

Handout Provided: Yes	**Formal Decision/Action Required** Minutes approved

Presentation Summary:

- No corrections were identified.

**See handout for agenda item 2 for more information.

Agenda Item 3. Update: Prior FAAC Business	**DeChá Reid Senior Director**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- 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:

- 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)
  - 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:

- There were no updates from John Wyatt
- Denise Welch provided a brief description about External Relations for our new committee members.
  - External Relations is a liaison for the agency to work with the Governor, Legislatures nd 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

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:

- 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 took 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:

-

**See handout for agenda item 7 for more information.

Agenda Item 8. Update: Legislative Committee	**Arnold Trejo, Subcommittee Chair**

Pending Approval

Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- 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.
  - FAAC will collaborate with TASFAA on Legislative issues
  - Meet with Karen on the new partnership with TASFAA Legislative Committee
    - 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:

- 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:

- 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.
- 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:

- **GEER Return of Funds Form Updated –** Financial Aid Services (FAS) recently updated the Governor's Emergency Education Relief (GEER) Returnof 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 y ear 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 EFTinstructions 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
  - During the Special Session HB 133 Changes to the Texas Education Code 54.354 (a) – Benefits of Survivors

Final Approval

- Changes within the statute now allows the suriving 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.
  - 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:

- 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

**See handout for agenda item 12 for more information.

Agenda Item 13. Discussion: Election of Vice Chair	**Denise Welch, Chair**
Handout Provided: No	**Formal Decision/Action Required** Yes/Motion Passed

Update Summary:

- 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

Agenda Item 14. Discussion: Selection of TASFA Subcommittee Chair	**Denise Welch, Chair**
Handout Provided: No	**Formal Decision/Action Required** Yes/Motion Passed

Presentation Summary:

- 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:

- **Proposed meeting dates**
  - 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

- 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

Pending Approval

• 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:
• Better understanding on how effective state financial aid programs from year-to-year retention and completion
  ○ 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
  ○ 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
  ○ 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
• Adjournment at 11:49 a.m.	

Pending Approval

March 3, 2022, FAAC Meeting Minutes

Committee Members in Attendance Via Virtual Meeting Connection		Committee Members Absent
Denise Welch, Chair Rachelè Garrett, Vice-Chair DeChá Reid, THECB Rep Jackie Adler Ben Bholan Victoria Chen Bridgette Ingram Cecelia Jones Ed Kerestly, Past-Chair Melet Leafgreen Robert Merino, TASFAA Rep 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

Summary:

**See handout for agenda item 1 for more information

Agenda Item 2. Consideration of Approval of Minutes from the meeting held on Dec. 9, 2021	**Denise Welch, Chair**
Handout Provided: Yes	**Formal Decision/Action Required** Minutes approved

Summary:

- No corrections were identified.

**See handout for agenda item 2 for more information.

Agenda Item 3. Update: Prior FAAC Business	**DeChá Reid Senior Director**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- No Prior Business

Agenda Item 4. External Presentation: Certified Financial Aid Administrator Program	**Shannon Crossland, Commission Chair Frank Phillips College**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Presentation Summary:

- Dr. Shannon Crossland presented on the Certified Financial Aid Administrator Program and provided information on the following:
  - Program Design and Development
  - Accreditation
  - Involvement in the Development of the CFAA Program
  - Eligibility Requirements
  - Exam Experience
  - Resources
  - Remote Proctoring
  - Recertification

**See handout for agenda item 4 for more information

Agenda Item 5. External Presentation: Reskilling and Upskilling Program	**Dr. Sheri Ranis, THECB-Workforce Education**
Handout Provided: No	**Formal Decision/Action Required** N/A

Presentation Summary:

- Dr. Sheri Ranis presented on the Reskilling and Upskilling Program and provided information on the following:
  - Texas Reskilling Support Fund Grant Program
  - Reskilling Funding Focus
  - Reskilling Program Highlights
  - Eligible Credential Programs
  - Student Eligibility

Pending Approval

- Student Awards
- Reskilling Additional Features

**See handout for agenda item 5 for more information

Agenda Item 6. Update: External Relations	**John Wyatt, THECB-External Relations**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- John Wyatt provided information on the following:
  - Primary Elections were on Mar. 1, 2022
  - Expect to see in 2-3 weeks the Lt. Governor and the Speaker will issue interim charges for the committees; these are specific items that the Governor will want to see in the next session
  - During the spring and summer, committees will meet in interim hearings to consider the interim charges. The higher education committee will meet.
  - Each committee will issue an interim report based on findings during the interim hearings. The interim reports will include recommendations.
  - THECB will stay busy with the interim hearing meetings
  - THECB will need to develop the LAR in the coming months and report back to the committee.

Agenda Item 7. Update: THECB Financial Aid Strategic Priority	**Dr. Charles Conterò-Puls, Assistant Commissioner**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Update Summary:

- Dr. Charles Conterò-Pulse presented the THECB Financial Aid Strategic Priority and provided information on the following:
  - THECB Strategic Architecture
  - Randomized Controlled Trail
  - Technological Infrastructure

**See handout for agenda item 7 for more information.

Agenda Item 8. Update: TASFA Subcommittee	**Bridgette Ingram, Subcommittee Chair and Claudette Jenks, Director, College Readiness and Success**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Update Summary:

- Bridgette Ingram, Leah Smalley and Claudette Jenks presented the Online TASFA and provided information on the following:
  - Continuing TASFA programming
  - Testing in progress
  - Collaborating with vendors and the TASFA workgroup on file layout
  - Setting up institutions in MoveIt
  - Communication about online TASFA sent to institutions and school districts

**See handout for agenda item 8 for more information

Agenda Item 9. Update: Data Collection Subcommittee	**Dede Gonzales, Subcommittee Chair**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Update Summary:

- Dede Gonzales provided information on the following:
  - Update on Online TASFA
  - FAD Data Modernization
  - Update on Office of Student Financial Aid Programs
  - Recent Memos
  - Upcoming Memos
  - Upcoming Deadlines:
  - Authority to Transfer Process
  - FAD Certification Process
  - FAS Webcast

**See handout for agenda item 8 for more information

Agenda Item 10. Update: Legislative Subcommittee	**Arnold Trejo, Subcommittee Chair**

Pending approval

Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- Arnold Trejo provided information on the following:
  - Serving as an advisor in the TASFAA Legislative Committee
  - He has been invited to future TASFAA Legislative meetings:
    - March 31, June 23 and September 15

Agenda Item 11. Texas Association for State Financial Aid Administrator's (TASFAA)	**Robert Merino, TASFAA President**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- Robert Merino provided information on the following:
  - Regional trainings are in progress throughout the State of Texas
    - March 1 – Houston at San Jacinto College – 56 registered
    - March 3 – San Marcos at Texas State University – 43 registered
    - March 23 – El Paso at El Paso Community College – 41 registered
    - March 25 – DFW at Collin County College – 66 registered
    - March 31 – Lubbock at Lubbock Christian University – 47 registered
  - TASFAA is offering a virtual event at the end of March
  - New Aid Office Workshop registration is now open

Agenda Item 12. Update: High School District	**Ben Bholan, Arlington ISD; Shonna Norton, Wichita Falls ISD**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- Ben Bholan and Shonna Norton provided information on the following:
  - ISDs are struggling to get students to complete FAFSA's. Current data shows that more students have completed FAFSA this current year than last year; believe it is due to the new high school graduation. Other districts are seeing the same trend.
  - Enrollment is down this school year
  - ISDs are very excited with the online TASFA
  - ISDs are hosting evening FAFSA events to promote the completion
  - There are challenges with the TSI requirements; it is a barrier with students

Agenda Item 13. Update: Office of Student Financial Aid Programs	**DeChà Reid, Senior Director**
Handout Provided: No	**Formal Decision/Action Required** Yes/Motion Passed

Update Summary:

- DeCha Reid provided information on the following:
  - Effective March 1, the agency reduced the interest rate on certain CAL loans from 5.25% to 3.75%. These are loans made between August 2011 and October 2013 and impacts of 6,500 loans. We were able to reduce the interest rate due to the recent interest rate changes. On April 1, THECB will reduce approximately 5,500 loans (reduction of 0.25 – 5.25% to 5.00% and 450% to 4.25%). All borrowers who were impacted were notified.
  - The following memos were recently released:
    - B.1.10 Strategy Funds Request released on 3/1/2022: This announcement outlined the process to request the additional B.1.10 funds through an online form. Schools must utilize all the original allocation before requesting funds from the B.1.10 strategy. Changes to student count are done through the Grant Payment Portal.
    - A flyer for the Monthly Webcast was released on 3/1/2022 with the topics of discussion. An additional webcast was scheduled on 3/8/2022 at 1:30 p.m. (Central Standard Time).
    - FY2022 FAD Cycle One opened on 2/28/2022. There were some delays in receiving the reports. The issues were resolved and can continue to resubmit the FAD file. Cycle one does not require reconciliation, however, THECB encourages schools to review their data and budget totals to assist with future reconciliation process for cycle three. Schools are encouraged to to submit a FAD file in enough time to work through any errors.
    - State Financial Aid Opt-in/out released on 2/22/2022: All institutions are required to complete the Opt-in/Opt-Out form by 3/11/2022 to participate in the state financial aid programs:
      - Educational Aide Exemption (EAE)
      - Texas College Work-Study (TCWS)
      - Work-Study Student Mentorship (WSMP)

  Institutions that do not submit an Opt-In/Opt-Out form by the deadline will not be included in the allocation calculation process for the 2023 Fiscal Year.

Pending Approval

- Upcoming deadlines
  - FAAC nominations is due on 3/11/2022
  - State Opt-In/Opt-Out form is due 3/11/2022
  - Good Neighbor nomination forms are due 3/15/2022
- SFAP accomplishments since the last FAAC meeting
  - We were able to generate almost 40,000 IRS 1098—E tax statements for borrows and they were mailed as of 1/31/2022.

Agenda Item 14. Discussion Topic: Feedback on how schools administering Reskilling and Upskilling	**Denise Welch, Chair**
Handout Provided: No	**Formal Decision/Action Required** No

Discussion Summary:

- Three schools are participating in the program
- TSTC is on target to wrap-up the spending on the grant funds
- Stephen F. Austin has not awarded any funds to students
- Panola College was able to spend funds in the fall but was not as successful in the spring term.

Agenda Item 15. Discussion Topic: Feedback on the decrease in loan borrowing	**DeChà Reid, Chair**
Handout Provided: No	**Formal Decision/Action Required** N/A

Discussion Summary:

- SFAP has seen a decline in the number of borrowers based on loan data year-over-year. Are students less needy, higher federal loans that offset our state loan programs, or is it other aid that is taking the place of loan borrowing?
  - Less students on campus. Students are virtual and do not need as many loan funds and charges are being covered through grants and scholarships, along with federal funds
  - Students do not want loans and are aware of the debt. Also, students are living at home to cut back on costs.
  - Graduate students stated that the GradPlus process is easier, and CAL seems a little more challenging.

Agenda Item 16. Discussion Topic: Feedback on creating a succession plan	**Rachelè Garrett, Vice Chair**
Handout Provided: No	**Formal Decision/Action Required** N/A

Discussion Summary

- Feedback concerning the NASFAA article:
  - Loss of employees to retirement and only able to hire a smaller percentage
  - Looking at the remaining staff and is there potential to retire
  - Staff are leaving for positions outside of financial aid

Agenda Item 17. Discussion Topic: Feedback for Future Meetings	**Denise Welch, Chair**
Handout Provided: No	**Formal Decision/Action Required** N/A
Discussion Summary • NASFAA for the SAI-Bridgette Ingram ○ What is the agency doing with SAI?	

Agenda Item 18. Adjournment	**Denise Welch, Chair**
Handout Provided: No	**Formal Decision/Action Required** N/A
• Adjournment at 12:46 p.m.	

Pending Approval

June 2, 2022, FAAC Meeting Minutes

Committee Members in Attendance Via Virtual Meeting Connection		Committee Members Absent
Denise Welch, Chair Rachelè Garrett, Vice-Chair DeChá Reid, THECB Rep Jackie Adler Ben Bholan Victoria Chen Bridgette Ingram Ed Kerestly, Past-Chair Melet Leafgreen Robert Merino, TASFAA Rep Holly Nolan Shonna Norton	Joseph Ruiz Tevian Sides Thomas Ratliff Joy Thomas DeDe Gonzales Jase Kugiya Sal Ramirez Gilbert Zavala	Steven Peterson Cecelia Jones Arnold Trejo Ben Bholan

Agenda Item 1. Welcome, Introductions and Overview of Meeting	**Denise Welch, Chair**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Summary:

**See handout for agenda item 1 for more information

Agenda Item 2. Consideration of Approval of Minutes from the meeting held on Dec. 9, 2021	**Denise Welch, Chair**
Handout Provided: Yes	**Formal Decision/Action Required** Minutes approved

Summary:

- No corrections were identified.

**See handout for agenda item 2 for more information.

Agenda Item 3. Update: Prior FAAC Business	**DeChá Reid Senior Director**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- **College Student Budgets**: There was a potential delay in tuition and fees from schools.
  - Is there some flexibility with the deadline?
  - What is the process for modifying the tuition cost?

Agenda Item 4. Presentation: Building a Talent Strong Texas	**Melissa Henderson, Associate Commissioner, Strategic Partnerships & Executive Director**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Presentation Summary:

- Melissa Henderson presented on Building a Talent Strong Texas and provided information on the following:
  - Stakeholder Engagement
  - Attainment of Postsecondary Credentials
  - Postsecondary Credentials of Value
  - Research, Development and Innovation
  - Advancing Equity for the Benefit of All Texas

**See handout for agenda item 4 for more information

Agenda Item 5. Presentation: Texas OnCourse Academy	**Laura Brenna, Assistant Commissioner, Innovation and Development**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Presentation Summary:

- Laura Brenna presented on Texas OnCourse Academy and provided information on the following:
  - Texas OnCourse Background
  - Statewide Collaboration

Pending Approval

- Core Offerings
- Academy Dashboard
- Academy Modules
- Digital Learning
- Map My Path
- My Texas Future

**See handout for agenda item 5 for more information

Agenda Item 6. Presentation: Texas Leadership Scholars Program	**Matt Parson, Assistant Commissioner, Workforce Innovation**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Presentation Summary:

- Matt Parson presented on the Texas Leadership Scholars Program and provided information on the following:
  - Goals
  - Eligibility – Students
  - The Student Experience
  - Financial Commitment
  - Institutional Partners
  - Student Application Process

**See handout for agenda item 5 for more information

Agenda Item 7. Update: External Relations	**John Wyatt, External Relations**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- Interim Activities of the Legislation Session
  - House and Senate committees were provided with the interim charges.
  - Commissioner Keller testified on several occasions for Higher Education.
  - Commissioner Keller was jointed by other commissioners within the tri-agency on the partnership.
  - Hearings will slow down during the summer and pick up late-summer and fall
  - Agency focus is the LAR (Legislative Appropriation Request) for the next biennium (2024-25.
  - Working on ways to continue to support higher education by providing the data and analysis to Legislators.
    - Selective Service with matching the federal requirements
    - FAFSA/TASFA changes
    - Student Aid Index

Agenda Item 8. Update: THECB Financial Aid Strategic Priority	**Charles Conterò-Puls, Assistant Commissioner**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- **Agency Strategic Architecture**
  - Continue to work on the architecture
  - Outreach to the Financial Aid Community on what strengthens the financial aid ecosystem. Survey to follow in June.
- **Texas Transfer Grant Pilot Program**
  - Participating public universities and HRI's will receive recipient rosters
  - Student are listed on the 2022-23 FAFSA
- **Continued work on Technology Infrastructure**
  - Will onboard new technology with a new system that will help the Transfer Grant and other financial aid programs. The new technology should be in place by September.
  - Will onboard two repayment programs in September as well as other programs later in the year. The next program will be TCWS.
  - The long-term goal is to bring all the state financial aid programs
  - Plan to launch programs at the start of the fiscal year. The programs can take up to 24 months to launch all programs into the new repayment system.

Agenda Item 9. Joint Update: TASFA Subcommittee: House Bill 3 (FAFSA/TASFA Graduation Requirement) and House Bill (On-Line TASFA)	**Bridgette Ingram, Subcommittee Chair; Claudette Jenks, Director, College Readiness; and Leah Smalley, Assistant Director, THECB**

Pending Approval

Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- **Development for the online TASFA**
  - Mirroring questions for the TASFA based on the FAFSAS
  - Starting the User Acceptance Testing with the internal members
  - Will have iterations of testing the application from June-August
  - Schools will be involved in the file transfer
  - Memo sent to the financial aid community on May 10, 2022 on the file layout

Agenda Item 10. Update: Dada Collection Subcommittee	**Dede Gonzales, Subcommittee Chair**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Update Summary:

**See handout for agenda item 10 for more information

Agenda Item 11. Legislative Subcommittee	**Arnold Trejo, Subcommittee Chair**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- **No Update**

Agenda Item 12. Update: Texas Association for State Financial Aid Administrators (TASFAA)	**Robert Merino, TASFAA President**
Handout Provided: No	**Formal Decision/Action Required** N/A

Update Summary:

- NAOW was held in April with a successful turnout
- TASFAA Award nominations will open in early June
- Elections for 2022-23 Board members is planned for July

Agenda Item 13. Update: High School District	**Ben Bholan, Arlington ISD; Shonna Norton, Wichita Falls ISD**
Handout Provided: No	**Formal Decision/Action Required** Yes/Motion Passed

Update Summary:

- **FAFSA Graduation Requirement**
  - Enrollment was down in Districts; more applications processed this school year than in the past. Thirty to forty more FAFSA's and TASFA's were completed
  - Hoping that more applications will mean higher enrollment for IHE's

Agenda Item 14. Update: Office of Student Financial Aid Programs	**DeChà Reid, Senior Director, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Discussion Summary:

- Recent Announcement Announcements
  - 5/10/2022 TASFA FY 2024 File Layout Memo
  - 5/17/2022 Good Neighbor Program FY 2023 Selected Students Memo
  - 5/17/2022 User Access 2022 Annual Review for Financial Aid Web Portals Memo
  - 5/23/2022 TEXAS Grant, TEOG, TEG FY 2023 Program Guidelines Memo
- **Upcoming Deadlines**
  - TEXAS Grant, Texas college Work-Study, Work-study Student Membership, and Educational Aide Exemption data review discrepancies or Opt-in/Opt-out form due June 6, 2022 (sent to Financial Aid Directors)
  - User Access Annual Review-Online Verification form due June 10, 2022
  - FY22 FAD-Second Cycle Opens on June 15, 2022
  - Authority to Transfer Request form due on July 1, 2022
- **SFAP accomplishments since the June 2, 2022 FAAC Meeting**
  - The Texas Armed Services Scholarship Program (TASSP) Nomination Portal on April 19, 2022 for Legislators to submit their nominations for the 2022-23 academic year. The Texas Higher Education Coordinating Board

Pending Approval

encourages offices to submit TASSP nominations by August 1, 2022, so that students may receive funds early in the fall semester to assist with their educational expenses. Final deadline to submit a TASSP nomination is October 31, 2022.

- The Texas Higher Education Coordinating Board is testing a new process called "Watchlist". "Watchlist" will identify borrowers who have loans in default or litigation status in HELMS and will pause the application process for a new loan, alerting the borrower to contact our office to discuss the status of their account.
- The Texas Higher Education Coordinating Board will begin testing for federal interest rate changes to effect on July 1, 2022. This will also include rate change for variable rate CAL loans.

Agenda Item 15. Update: Recognition of members stepping down	**Denise Welch, Chair**
Handout Provided: No	**Formal Decision/Action Required** N/A

Discussion Summary:

- Six members were recognized for their work on the Financial Aid Advisory Committee. The June meeting was their last meeting.
  - Ed Kerestly
  - Joy Thomas
  - Ben Bholan
  - Jace Lugiya
  - Steven Peterson
  - Robert Merino

Agenda Item 16. Discussion Topic: Recommendation on Proposed Nominees for FAAC	**DeChà Reid, Senior Director, THECB**
Handout Provided: No	**Formal Decision/Action Required** N/A

Discussion Summary

- **Recommended new Financial Aid Advisory Committee members for the July Board meeting**
  - 2-Public Universities
  - 2-Private Universities
  - 1-HRI
  - 1-Community College
  - 1-ISD
    - Reginald Brazzle, Director, Scholarships & Financial Aid – Lamar University
    - Scott Lapinski, Director of Financial Aid – University of Texas Permian Basin
    - Lynda McKendree, Dean of Scholarships and Financial Aid – University of St. Thomas
    - Thomas Ratliff, Director of Student Financial Services – Abilene Christian University
    - Joseph Sanchez, Director of Financial Aid – University of North Texas Health Science Center
    - Gaby Leon, Directorof Financial Aid – Alvin Community College
    - Lisa Schoenbrun, Coordinator, College Readiness – El Paso ISD
    - Dede Gonzales, President-Elect, TASFAA Representative

Agenda Item 17. Discussion Topic: Addressing the unemployment compensation reported by students and parents	**DeChà Reid, Senior Director, THECB**
Handout Provided: No	**Formal Decision/Action Required** N/A

Discussion Summary

- Congressional changes to the tax treatment of Untaxed Income benefits could impact financial aid for some students and many families that are applying for financial aid. Essentially, some families may have included Untaxed Income benefits as adjusted gross incomefor 2020, even though this was later changed in the American Rescue Plan Act (ARPA) on March 11, 2020. ARPA created a $10,200 federal tax exclusion for each taxpayer with income and total income under $150,000.
  - How are schools working with families on this issue?
    - Using professional judgement on families
    - Not flooded with high numbers of families based on this issue
    - Currently have not implanted an internal policy to target these families
  - Have you seen any impact on financial aid awards that have been offered?

Board Approval

▪ There has not been much impact seen because it is difficult to identify unless the student is selected for verification.	
Agenda Item 18. Discussion Topic – Leveraging Financial Aid	**Thomas Ratliff, Director of Financial Aid, Abilene Christian University**
Handout Provided: Yes	**Formal Decision/Action Required** N/A

Discussion Summary
• Thomas Ratliff presented on Levering Financial Aid and provided information on the following:
  ○ Leveraging Concept
  ○ Reasons for Target
  ○ Recruitment Enrollment Funnel
  ○ Retention Funnel
  ○ Types of Leveraging Approaches
  ○ Academic Merit Awards
  ○ Performance Based
  ○ Specialty
  ○ Housing
  ○ Perception
  ○ Timing of Awards
  ○ Renewal of Awards
  ○ Net Results	

Agenda Item 19. Discussion Topic – Ways to address roadblocks with recruiting and retaining students	**Denise Welch, Chair**
Handout Provided: No	
Discussion Summary • Look at all funding avenues holistically to see where it may impact a student whether that is completion or graduation • Some roadblocks are a decrease in enrollment ○ Is it recruiting or lack of completion? • Look at data to see where students are at in their educational journey • Look at data at the institutions through the Institutional Research • Dual Credit students are on the rise, which means that they are not considered first-time college students. This changes the funding or enrollment, specifically at community colleges. • Possible change to recruiting approaches to include more adult-learners • Review the processes that may have a roadblock for students to enroll in 2- or 4-year institution of higher education	
Agenda Item 20. Transition of Leadership	**Denise Welch, Chair**
Handout Provided: No	
• The Chair position for the FAAC transitioned from Denise Welch to Rachelè Garrett	
Agenda Item 21. Feedback for Future Meetings	**Rachelè Garrett, Chair**
Handout Provided: No	
• Research related to FAFSA completion • Graduation rates • HEEREF outcomes ○ Did it help with persistence and enrollment? • Student Aid Index and the impact it will have at the state level	
Agenda Item 22. Adjournment	**Rachelè Garrett, Chair**
• Adjourned at 12:43 p.m.	

Pending Approval

September 8, 2022, FAAC Minute Meetings

Committee Members in Attendance Via Virtual Meeting Connection		Committee Members Absent
Rachelè Garrett, Chair Denise Welch, Past Chair DeChá Reid, THECB Rep Jackie Adler Reginald Brazzle Victoria Chen Bridgette Ingram Cecelia Jones Rachel Joseph-Student Rep Melet Leafgreen Gaby Leon Scott Lipinski Lynda McKendree Robert Merino, TASFAA Rep	Holly Nolan Shonna Norton Sal Ramirez Thomas Ratliff Joseph Ruiz Joseph Sanchez Lisa Schoenbrun Tevian Sides Gilbert Zavala	DeDe Gonzales Arnold Trejo

Agenda Item 1. Welcome, Introductions and Overview of Meeting	**Rachelè Garrett, Chair**
Handout Provided: Yes	**Formal Decision/Action Required** No

Summary:

**See handout for agenda item 1 for more information

Agenda Item 2. Consideration of Approval of Minutes from the meeting held on June 2, 2022	**Rachelè Garrett, Chair**
Handout Provided: Yes	**Formal Decision/Action Required** Minutes approved

Summary:

- No corrections were identified.

**See handout for agenda item 2 for more information.

Agenda Item 3. Presentation: When your "Business" impacts your "Business"	**Lou Murray, Southwest/Rocky Mountain Regional Lead for Earnest**
Handout Provided: Yes	**Formal Decision/Action Required** No

Update Summary:

**See handout for agenda item 3 for more information.

Agenda Item 4. Update: Prior FAAC Business	**DeChá Reid, Senior Director, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Presentation Summary:

- **None**

Agenda Item 5. Update: External Relations	**John Wyatt, Senior Director, External Relations, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Update Summary:

- Now and the start of the Legislative session there will be more interim hearings.
- Hearings with the House-Commissioner Keller will present on Affordability and Accessibility in Higher Education
- Agency is looking for $153 million dollars to support financial aid programs (three grant programs) to support the same eligible students from the current biennium (same service level); requested state general revenue funding to support new programs:
  - Transfer Grants
  - Texas Leadership Scholarship Program
- Texas Commission on Community College Finance
  - The commission is to help improve the finance of community colleges; a draft from then commission is to increase funding in TEOG to support the same student percentage in TEOG as does Texas Grant; greater flexibility of TEOG;

Pending Approval

new state financial aid program to cover tuition and fees in dual credit; expanding partnerships for paid workforce programs (work-study); final report in Jan 2023.
- Agency will not adopt a formal policy agenda for the Legislative session; we will work with institutions and other stakeholder to make the best decision possible on higher education.
- Tough to say what will be the hot topics for the Legislative session but will know more in December when the bills start being filed.

Agenda Item 6. Update THECB Financial Aid Strategic Priority	**Charles Conterò-Puls, Assistant Commissioner, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Presentation Summary:
- Remove barriers and enhance value
- Appreciate the survey participation of the FAAC of the FA Strategic Priority
- The survey revealed some areas that the agency believed would be the needs of the FA Community; still looking through survey results
- More to come as the agency continues to work through the structure of expanding access; multi-years to achieve the goal.
- Another area funded through GEER funds is the Transfer Grant program, looking potentially providing spring 2023 grants to recipients but will need the reimbursement rosters to make that determination since enrollment is key to making additional funds available.
- Technological Infrastructure is another key are that GEER funding is supporting. One item we were hoping to go live with new technology was for the Transfer Grant. However, the agency realized that another alternative plan was necessary to start the reimbursement process, but the agency will continue to work on our project timeline for updating our technology.

Agenda Item 7. Update: TASFA Subcommittee: House Bill 3 (FAFSA/TASFA Graduation Requirement) and House Bill 2140 (On-line TASFA)	**Bridgette Ingram, Subcommittee Chair, Claudette Jenks, Director Strategic Advising; and Leah Smalley, Assistant Director, THECB**
Handout Provided: No	**Formal Decision/Action Required** No

Update Summary:
- Update on the online TASFA
  - The agency sent an announcement to IHE" s on August 28,2022, regarding the delay of the online tool
  - Encouraging students to complete the paper TASFA which will be available Oct 1st.
  - Test files are in the progress and the agency is committed to deliver the test files to IHE's along with providing resources and training.
  - The online TASFA will be launched this 2022-2023 academic year.
  - The 2023-2024 paper TASFA draft will be released the week of Sept 12th; the fillable version both English and Spanish will be released on Oct 1st.
  - There were some updates to the paper version:
    - Annual Updates to years and dates
    - Annual updates to tax and income Internal Revenue Service (IRS)references.
    - Questions were reorganized to align with the development of the future Online TASFA.
    - Proof of Selective Service registration is no longer required and was removed from the Selective Service Statement of Registration Status Form
    - Removal of TASFA questions (refer to 2022-23 award year version)
      - Date of Graduation (HS or GED) #17
      - College grade Level #19
      - Degree/Certificate Attempting #20
      - Number of credits/hour enrolled #22
      - Associate degree for transfer students #23
      - Conviction restrictions #25
      - Previously received state aid #26
      - Work authorization and work-study interest #27

Agenda Item 8: Update: Data Collection Subcommittee	**DeChà Reid, Senior Director, THECB**
Handout Provided: Yes	**Formal Decision/Action Required** No

Update Summary: Update given by DeChá Reid on behalf of Dede Gonzales

**See handout for agenda item 8 for more information.

Agenda Item 9. Update: Legislative Subcommittee	**Arnold Trejo, Subcommittee Chair**
Handout Provided: No	**Formal Decision/Action Required** No

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Update Summary:

- No update provided

Agenda Item 10. Update: Texas Association for State Financial Aid Administrators (TASFAA)	**Robert Merino, TASFAA President**
Handout Provided: No	**Formal Decision/Action Required** No

Update Summary:

- Email the House of Education Committee on updating the SAP Selective Service, and Felony to align with the federal requirements
- Fall 2022 Conference for October
  - 204 are registered for the conference and 33 to the New Aid Officer Workshop
  - Waive late registration fees

Agenda Item 11. Update: High School District	**Lisa Schoenbrun, El Paso ISD; Shonna Norton, Wichita Falls ISD**
Handout Provided: No	**Formal Decision/Action Required** No

Update Summary:

- Great disappointment that the online TASFA was delayed but excited when it will launch.

Agenda Item 12. Update: Office of Student Financial Aid Programs	**DeChà Reid, Senior Director, THECB**
Handout Provided: Yes	**Formal Decision/Action Required** No

** See handout for agenda item #12 for more information

Agenda Item 13. Discussion Topic: Department of Education Fresh Start Letters- Denise Welch, Past Chair	**Rachelè Garrett, Chair**
Handout Provided: No	**Formal Decision/Action Required** No

Discussion Summary:

- Bridgette: Created a form for the fresh start, happy to share with the committee; received a few letters, only have eight students in 2022-2023 and created a report to identify other students.
- Rachelè: Only had one student that was impacted and plan to meet about the process. The timing was during announcement of Loan Forgiveness and was still working through those calls.
- Scott: Received one student before the guidance came out and created their own form to work through the guidance.
- Robert: Had about ten students and working through a report to identify more students; created a form. Notices that students are requesting more funds once they have been refreshed, require a student to request the maximum amount then plan to meet for next year.
- Melet: Received two students to refresh and noticed that the messaging has not been accurate or aligned with what the Department of Education.
- Thomas: Only received one letter and checked NSLDS and could not locate the student was on default. There have been some issues with NSLDS reporting that could be impacting the student.
- Lynda: Experiencing students are meeting the aggregate loan limit or have little availability remaining.
- Gilbert: Is there a solution to resolve the default that impacts the students that are being refreshed.

Agenda Item 14. Discussion Topic: Appointing a New FAAC Vice Chair	**Rachelè Garrett, Chair**
Handout Provided: No	**Formal Decision/Action Required** Yes, Motion Passed

Discussion Summary

- Melet Leafgreen was nominated and voted as Vice Chair.

Agenda Item 15. Discussion Topic: Feedback for Future Meetings	**Rachelè Garrett, Chair**
Handout Provided: No	**Formal Decision/Action Required** No

Discussion Summary

- SAI from the State perspective
- 2024-2025 Academic year
- Presentation on Diversity and Inclusion on Education Equity
- More information on the Texas Community College Commission

Pending Approval

• Top ten FA Items-NASFAA presentation • Presentation on FAFSA and Scholarship- Sal Ramirez • Presentation on the perspective from students	
Agenda Item 16. Adjournment	**Rachelè Garrett**
Handout Provided: No	**Formal Decision/Action Required** Yes
Discussion Summary • 12:20pm; Denise motion to adjourn and Victoria Second	

Pending Approval

State of Student Aid and Higher Education in Texas

A Publication by Trellis Research

Jeff Webster, Director of Research, Trellis Company

Carla Fletcher, Senior Research Analyst, Trellis Company

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About Trellis Company

- Trellis is a nonprofit that helps student borrowers successfully repay their education loans and promotes access and student success in higher education.
- Trellis provides services to student loan borrowers and support to institutions.
- Trellis funds the Trellis Foundation and a Community Investment division that provides student success services and research to colleges.

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- Trellis Research provides colleges and policymakers with insight into student success through the lens of college affordability.
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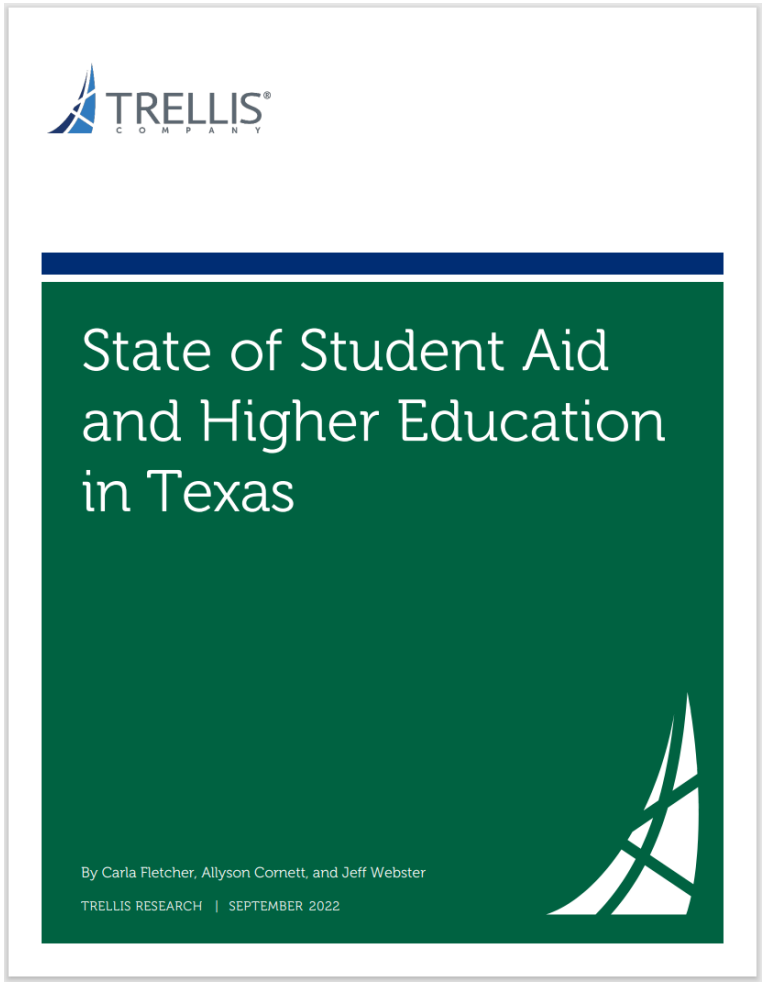
SOSA Report



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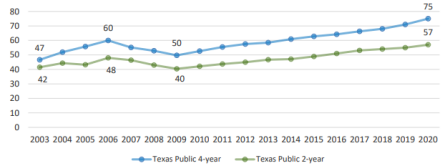
SOSA Page Layout

Paying for A Bachelor's Degree Through Work Alone Would Require 75 Hours per Week at Minimum Wage

Hours of Minimum Wage Work per Week Needed to Pay for an Average Undergraduate Education in Texas, by Sector (2003 to 2020)



In earlier decades, many students financed an undergraduate education by taking a full course load while working enough hours to cover living and educational expenses, perhaps with the aid of savings from a full-time summer job. From 1966 to 1981, a time in which the minimum wage increased fairly regularly, an industrious undergraduate could have paid for a year of education at a public university — including tuition, food, and housing — by working about 24 hours per week at a minimum wage job.

In the early 1980s, as the cost of education began to climb and the minimum wage increased less frequently, the number of work hours needed to pay for an education began to rise. The hours needed to pay for an undergraduate education continued to inch upward in the 1990s, then rose again sharply at the turn of the century.

In 2020-2021, an in-state, residential undergraduate would have had to work 75* hours every week of the year to pay for two semesters at a Texas public university, and 57** hours for two semesters at a Texas community college. This is an increase from the previous year and is a continuation of the upward trend beginning in 2010, which reflects the period of annual minimum wage increases (2006-2009) coming to an end.

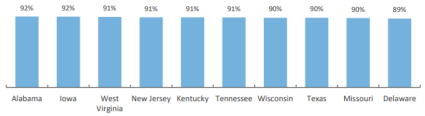
*The average weighted student budget for an in-state, residential student at a Texas public four-year university in AY 2020–2021 was $26,415. In 2020, the minimum wage was $7.25 per hour, with 6.2 percent taken out for Social Security. At a net of $6.80 per hour, a full-time Texas student with no other financial aid or assets would have to work 3,885 hours per year, or 75 hours per week, to put him or herself through school.

**The average weighted student budget for an in-state, residential student at a Texas public community college in AY 2020–2021 was $20,232. In 2020, the minimum wage was $7.25 per hour, with 6.2 percent taken out for Social Security. At a net of $6.80 per hour, a full-time Texas student with no other financial aid or assets would have to work 2,975 hours per year, or 57 hours per week, to put him or herself through school.

Sources: Minimum wage: U.S. Department of Labor, Employment Standards Administration, "History of Federal Minimum Wage Rates" (http://www.dol.gov/whd/minwage/chart.htm); U.S. Data: Postsecondary Education Opportunity, "I worked my way through college. You should too," 2008 update to *Research Newsletter*, Issue Number 125 (November 2002) (www.postsecondary.org); Texas Data: U.S. Department of Education, National Center for Education Statistics, IPEDS Data (http://www.nces.ed.gov/ipeds/).

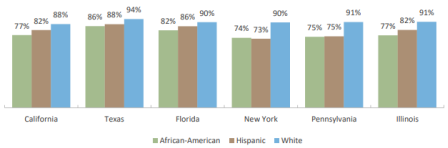
Texas Tops the Most Populous States in High School Graduation Rates

States with the Highest High School Graduation Rates (2018-2019)



Texas ranked third in the nation for high school graduation rates in 2018-2019, tying with two other states at 90 percent. Texas ranked highest among the six most populous states and led them in graduation rates within racial and ethnic groups. Nationally, the overall graduation rate in 2018-2019 was 86 percent.

High School Graduation Rates, by Race/Ethnicity (2018-2019)



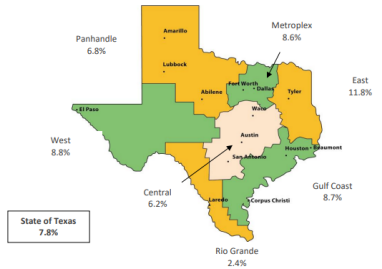
States shown in order by size of population

The recent increases in high school graduation rates have been due in part to dramatic reductions in the number of "dropout factory" high schools in the past 20 years. These schools are defined as having 60 percent or less of their ninth-grade class still enrolled in their senior year. In 2002, more than 2.6 million students were enrolled in these high schools compared to less than 900,000 in 2015.

Sources: Graduation Rates: U.S. Department of Education, ED Data Express, Data about elementary and secondary schools in the U.S. (https://eddataexpress.ed.gov/); All else: America's Promise Alliance, *2017 Building a Grad Nation Report: Progress and Challenge in Raising High School Graduation Rates* (http://gradnation.americaspromise.org/report/2017-building-grad-nation-report#/over-5-low-graduation-rate-high-schools).

Texas Three-Year Cohort Default Rates Vary by Region

Three-year Cohort Default Rates* (FY 2018)



The overall Fiscal Year (FY) 2018 three-year cohort default rate (CDR) for Texas was 7.8 percent (compared to 10.2 percent in FY 2017). Texas' FY 2018 CDR was 0.5 percentage points higher than the 7.3 default rate for the nation. Cohort default rates for FY 2018 vary substantially from region to region, from a high of 11.8 percent in the East Texas region to a low of 2.4 percent in the Rio Grande region.

*A three-year cohort default rate is the percentage of student borrowers with loans entering repayment in a given fiscal year who default on their obligations during that given fiscal year or in the next two fiscal years that follow. For example, the FY 2018 cohort default rate is based on student borrowers who entered repayment during FY 2018 and subsequently defaulted by the end of FY 2020.

Source: U.S. Department of Education, Fiscal Year 2017 and Fiscal Year 2018 Three-Year Official Cohort Default Rates, Washington, D.C., 2021.

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SOSA Topics

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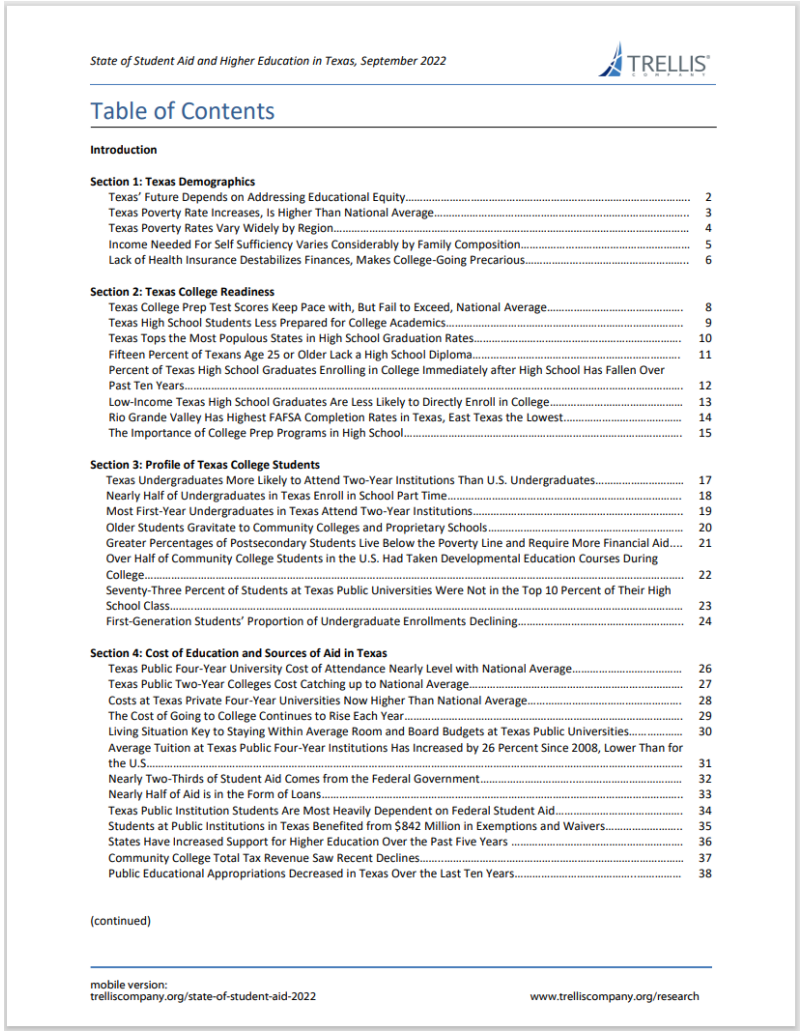

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(continued)

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Texas Demographics:

The Importance of the Education of the Hispanic Population to the Future of Texas

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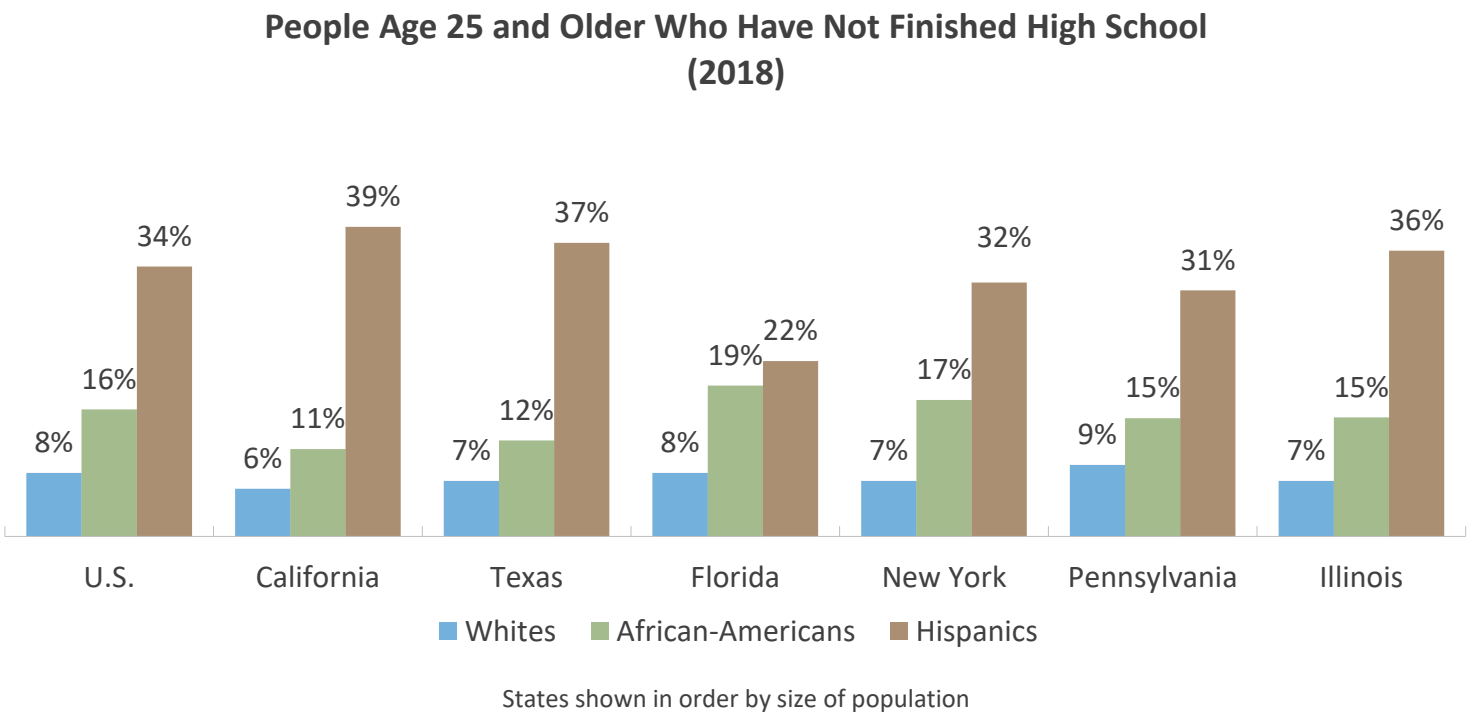
High School Graduation



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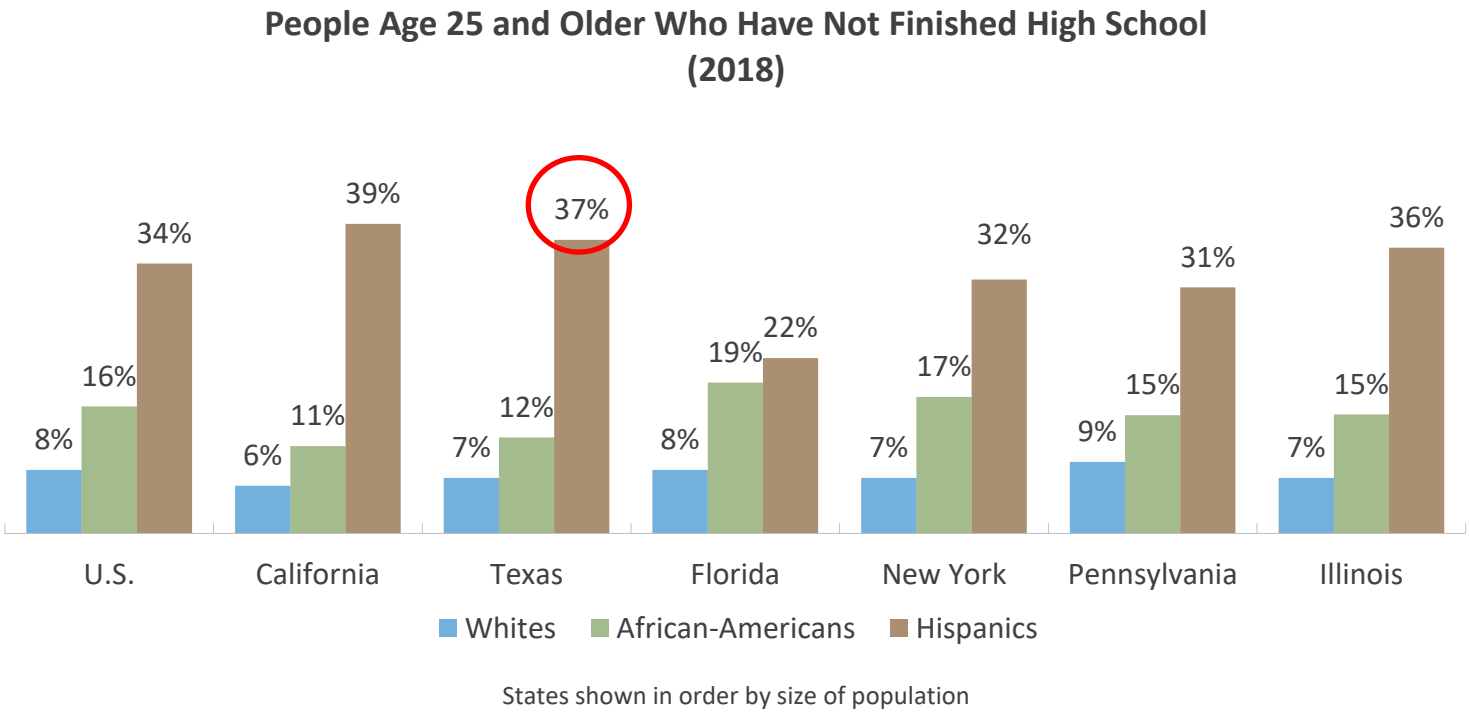
High School Graduation



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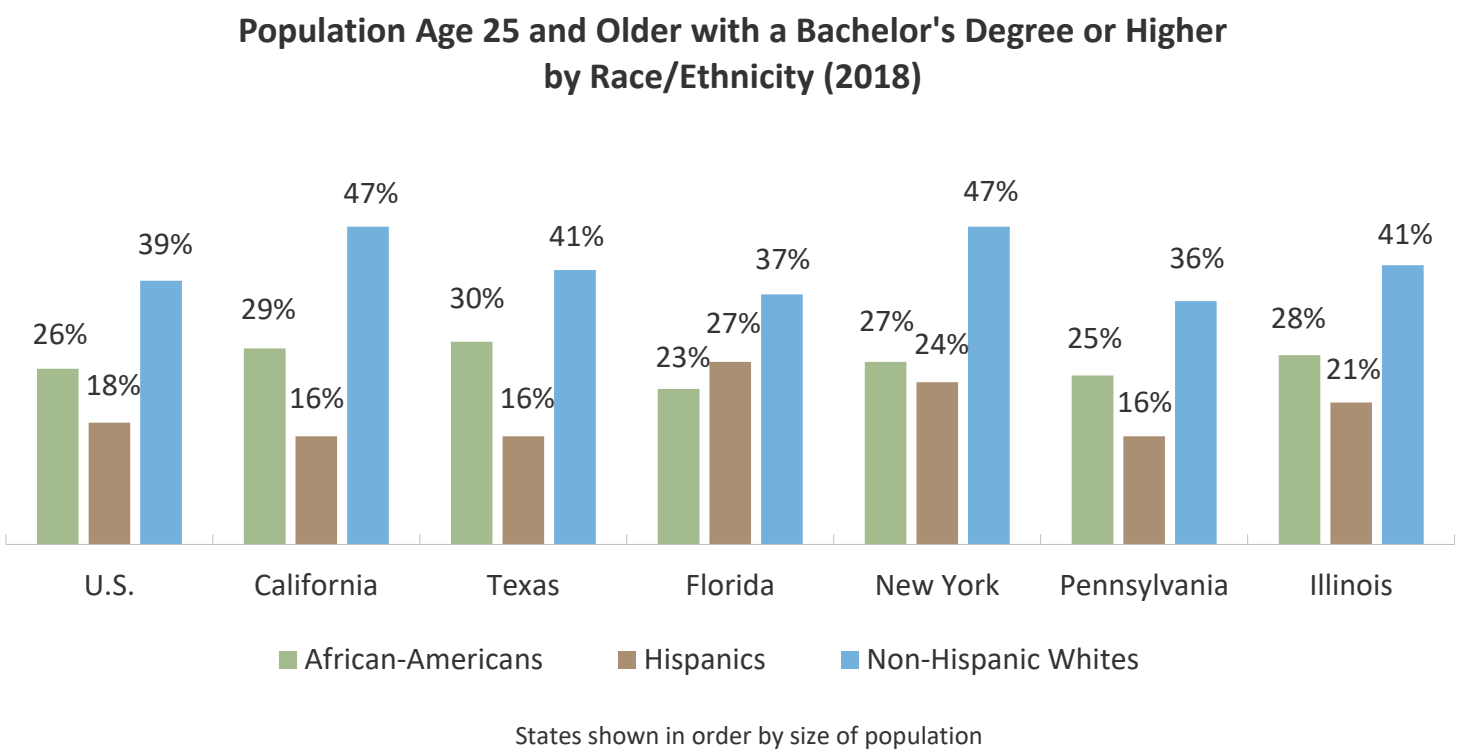
College Attainment



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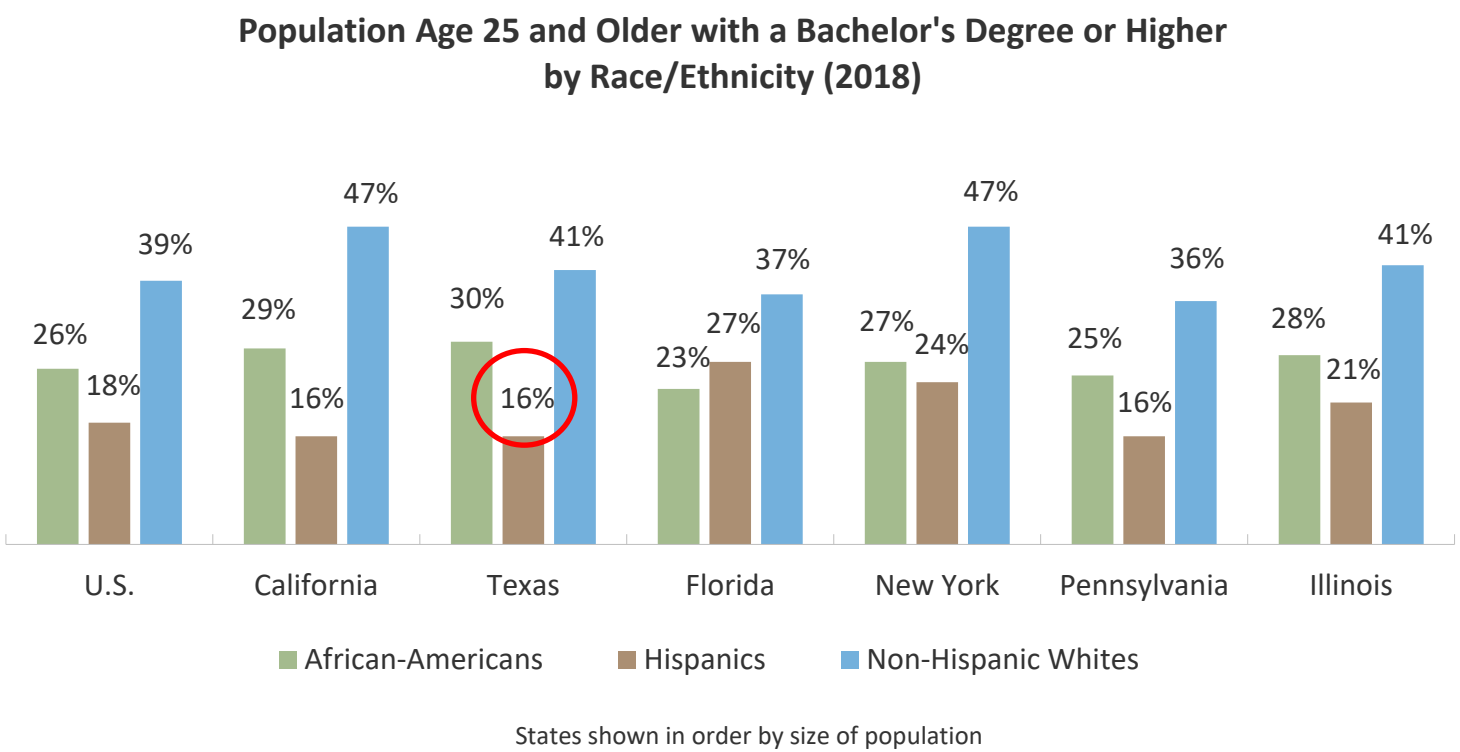
College Attainment



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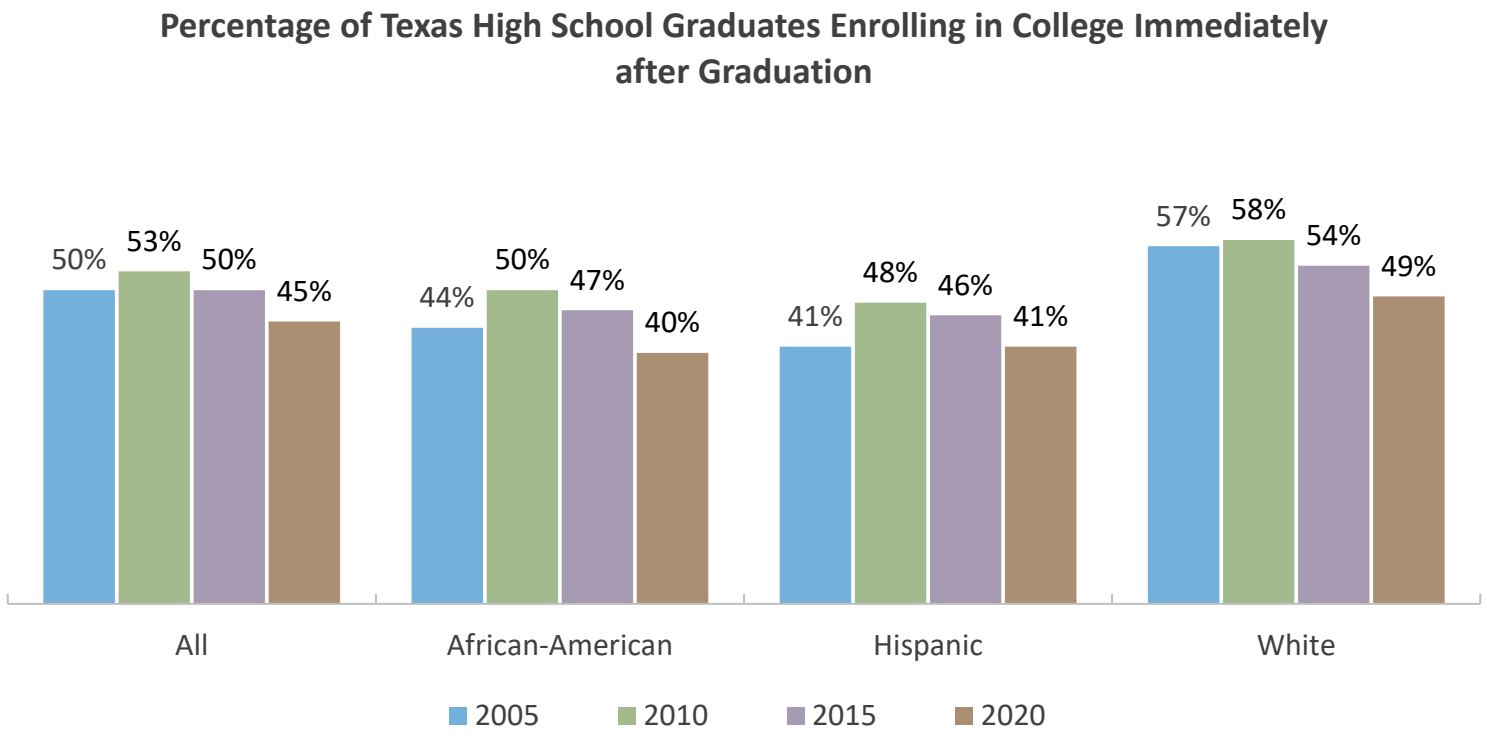
College Enrollment



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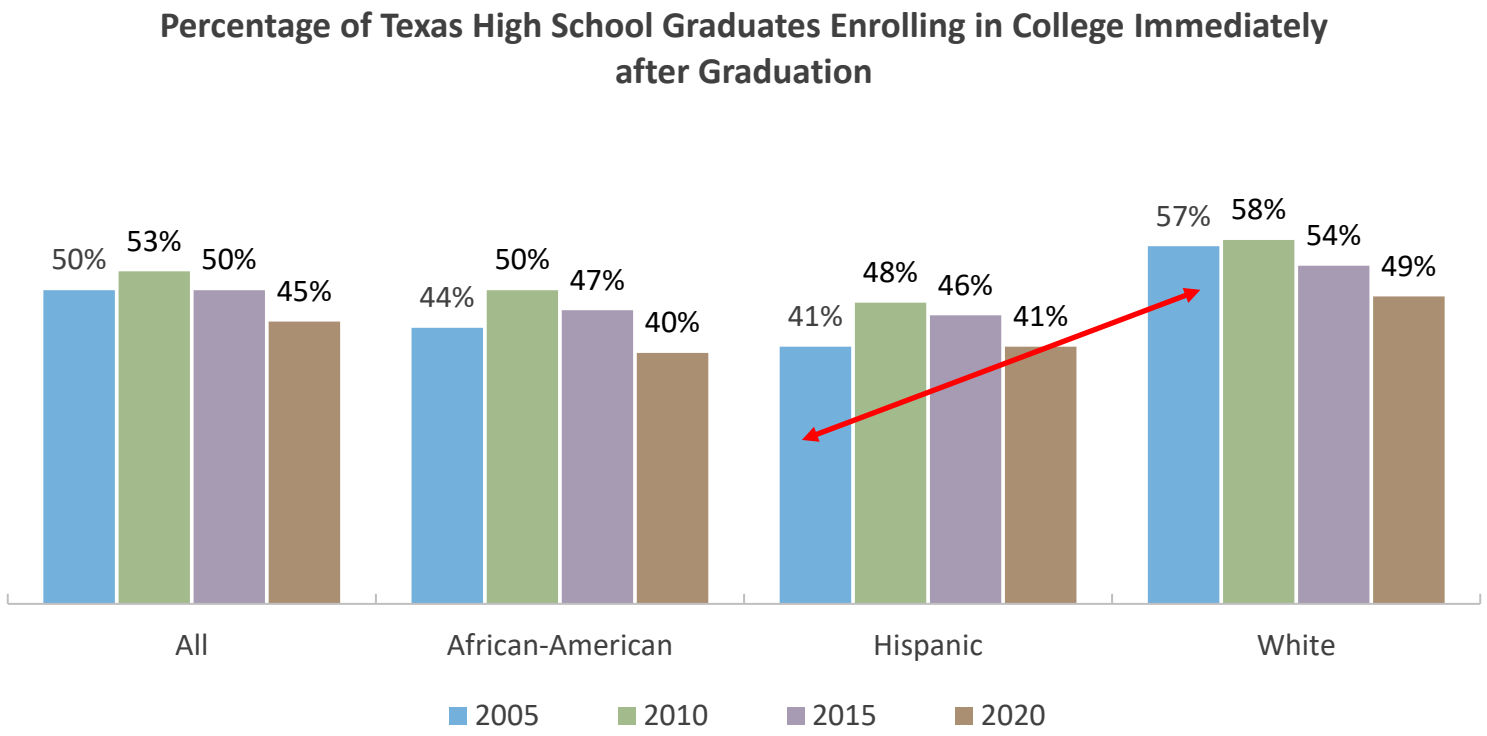
College Enrollment



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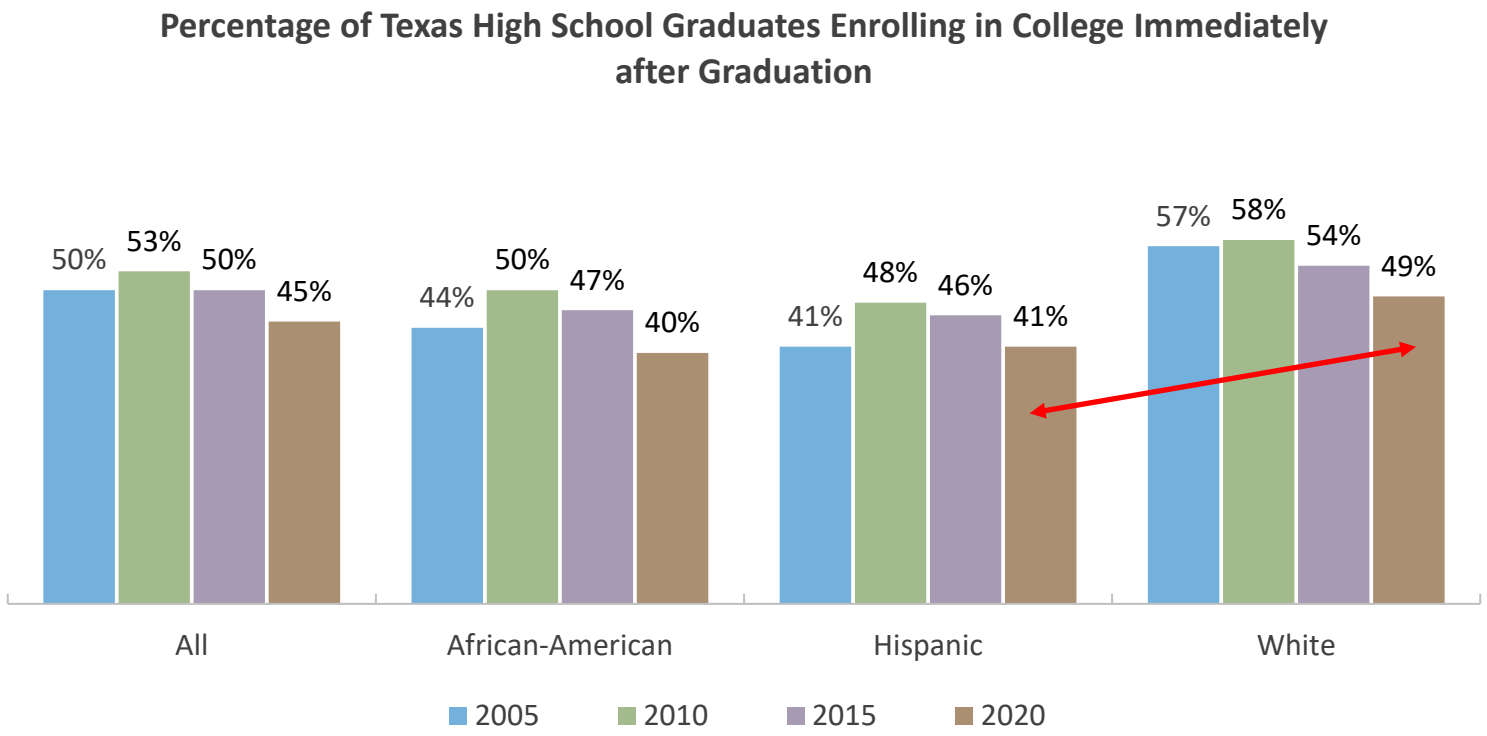
College Enrollment



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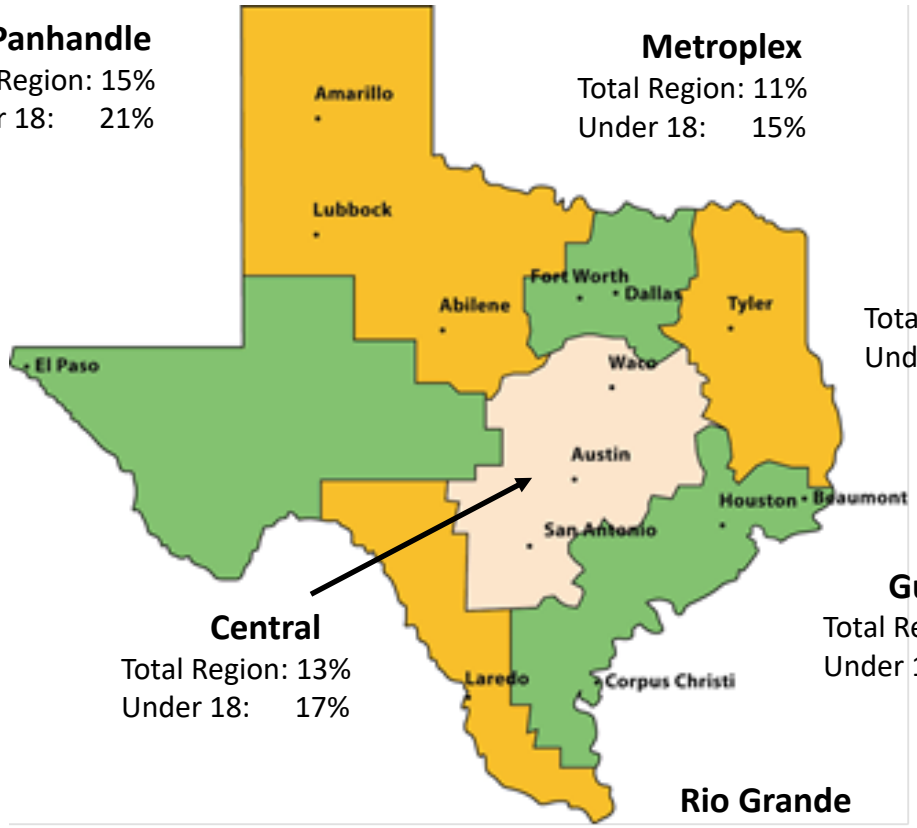
Poverty in Texas



Panhandle
Total Region: 15%
Under 18: 21%

Metroplex
Total Region: 11%
Under 18: 15%

West
Total Region: 16%
Under 18: 22%

East
Total Region: 16%
Under 18: 24%

State of Texas
Total Region: 13.6%
Under 18: 19.2%

Central
Total Region: 13%
Under 18: 17%

Gulf Coast
Total Region: 13%
Under 18: 19%

Rio Grande
Total Region: 26%
Under 18: 36%

Section 1, page 4

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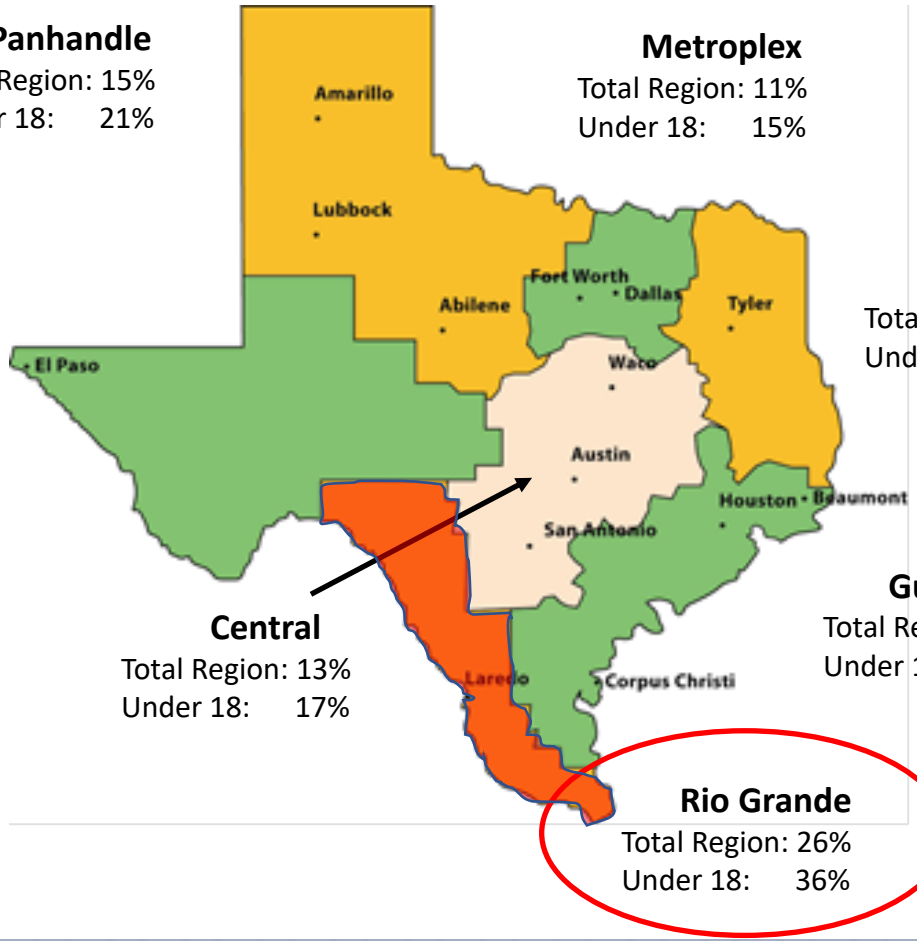
Poverty in Texas



Panhandle
Total Region: 15%
Under 18: 21%

Metroplex
Total Region: 11%
Under 18: 15%

West
Total Region: 16%
Under 18: 22%

East
Total Region: 16%
Under 18: 24%

State of Texas
Total Region: 13.6%
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Central
Total Region: 13%
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Gulf Coast
Total Region: 13%
Under 18: 19%

Rio Grande
Total Region: 26%
Under 18: 36%

Section 1, page 4

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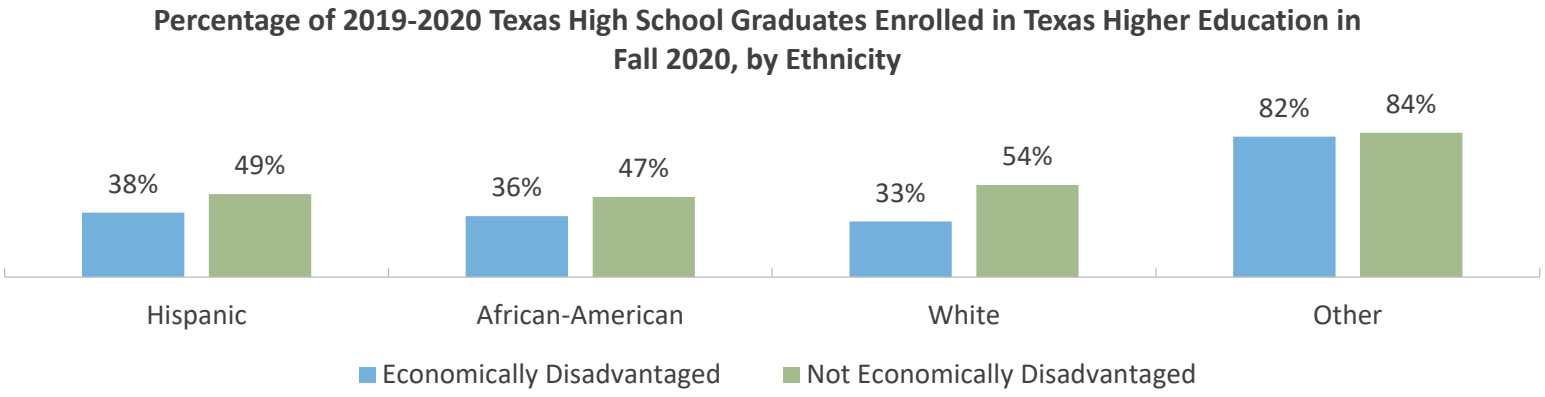
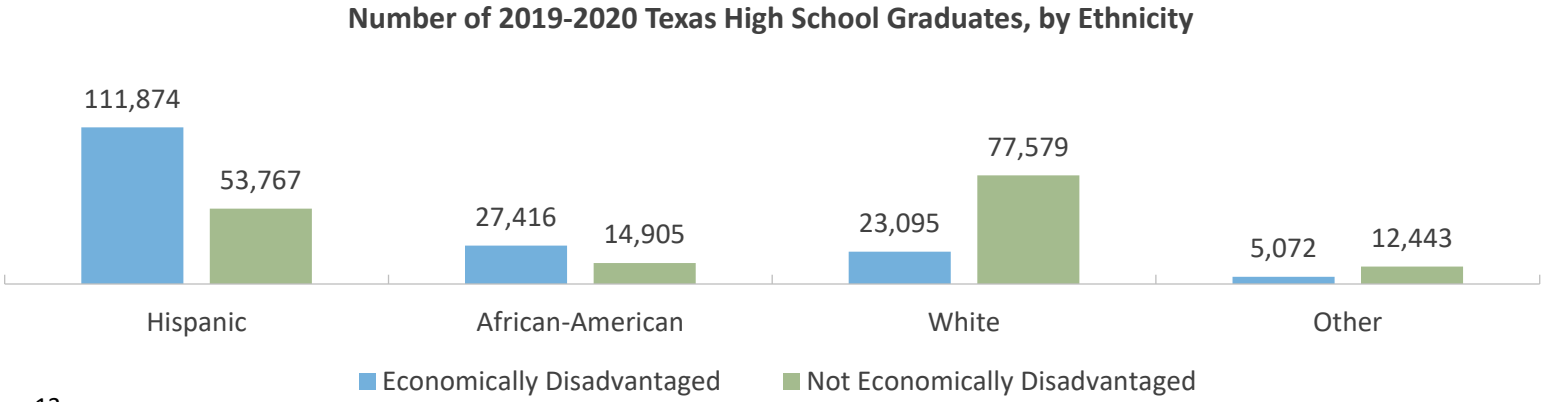
Low-Income High School Graduates





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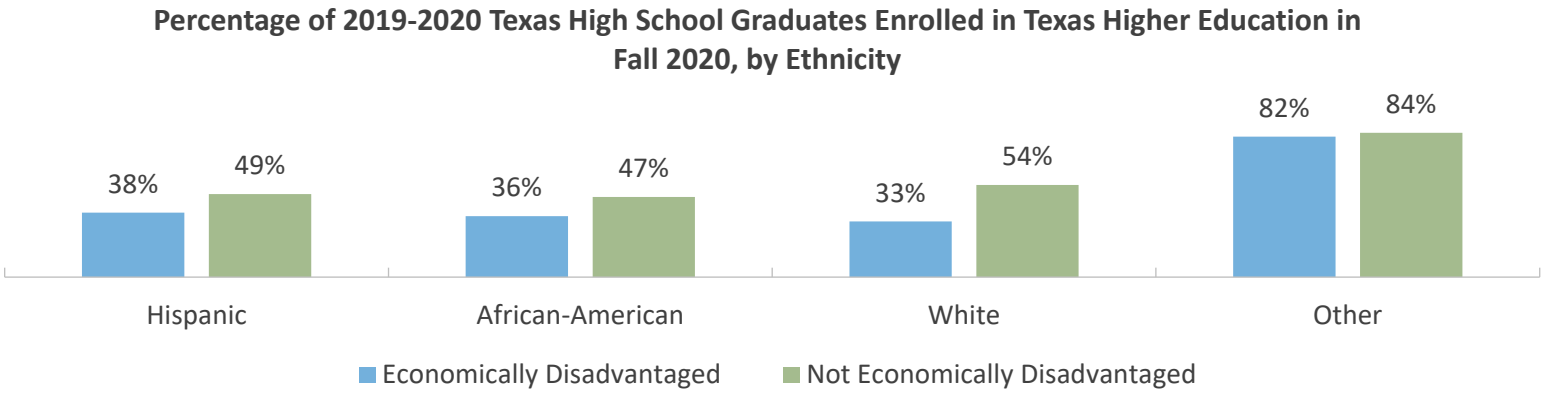
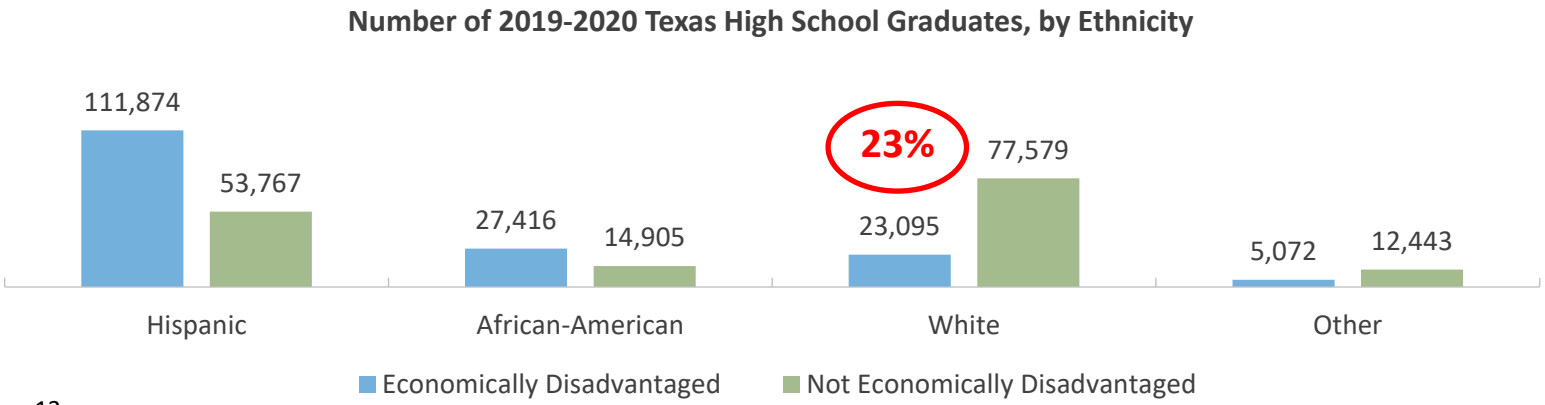
Low-Income High School Graduates





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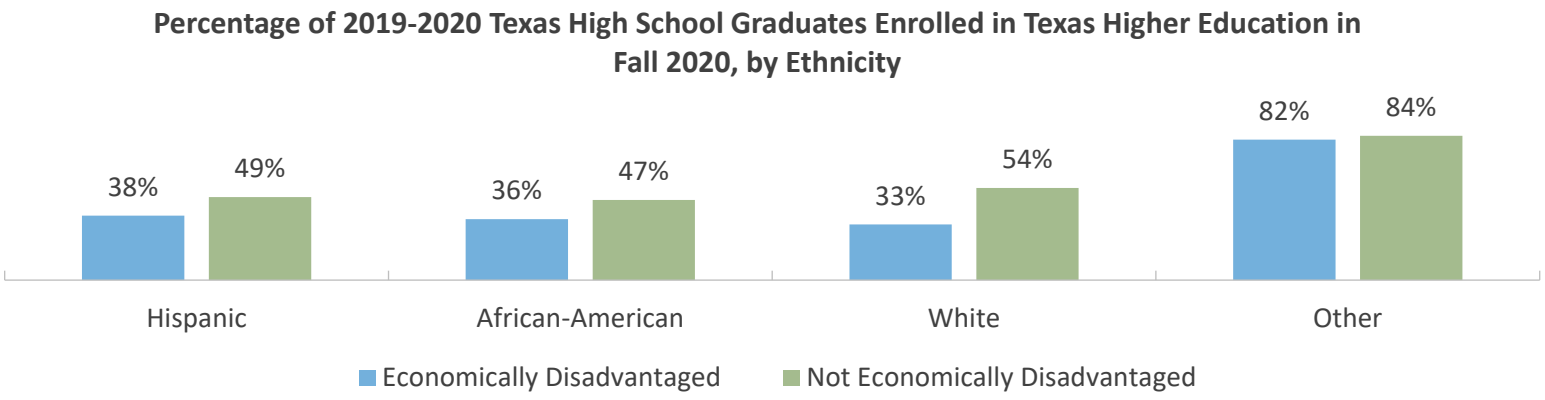
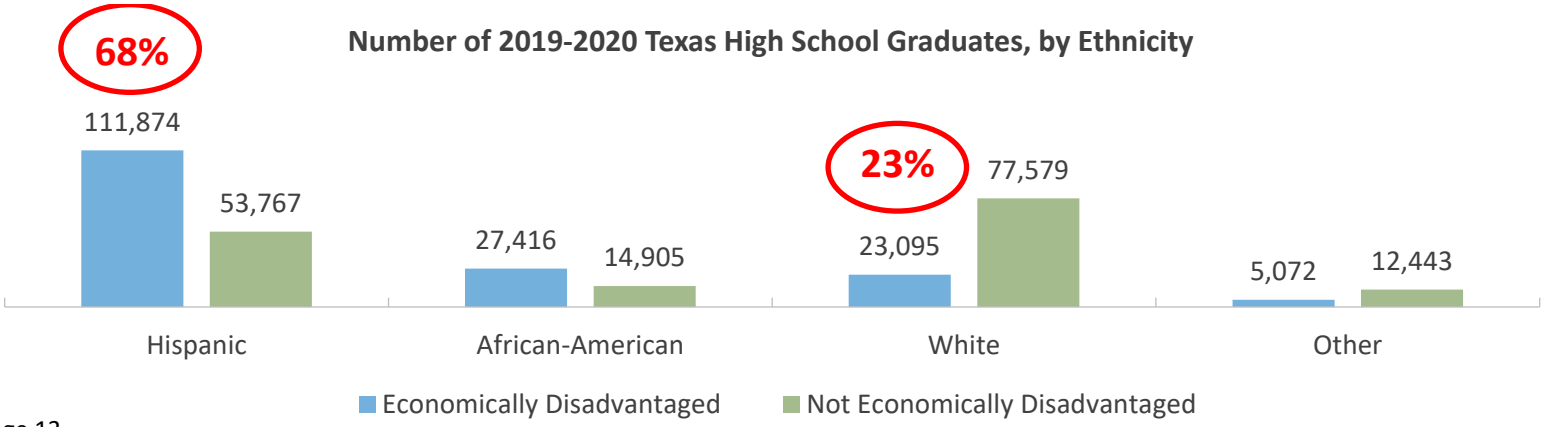
Low-Income High School Graduates





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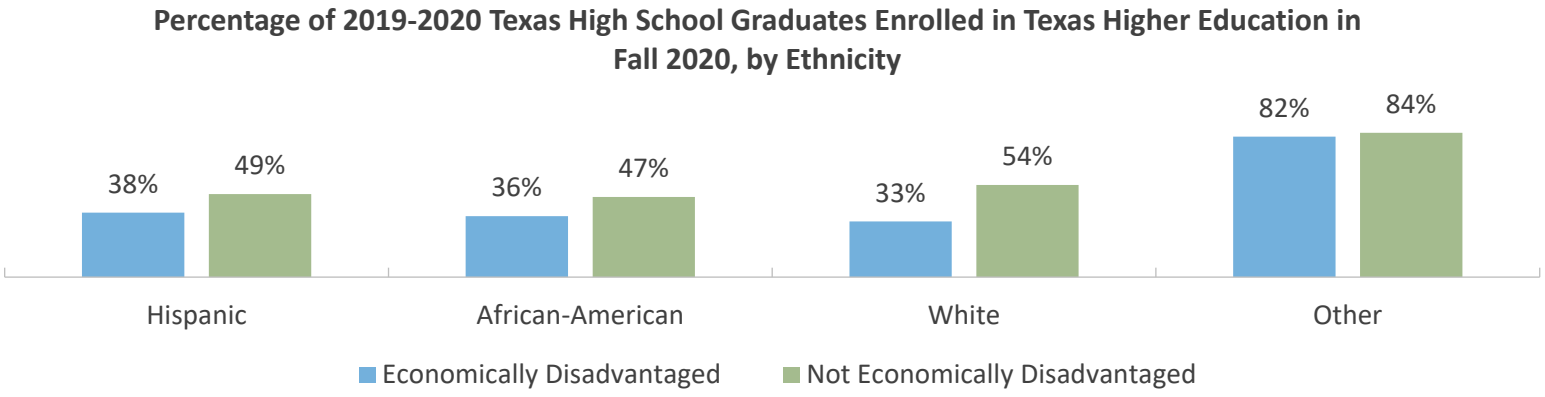
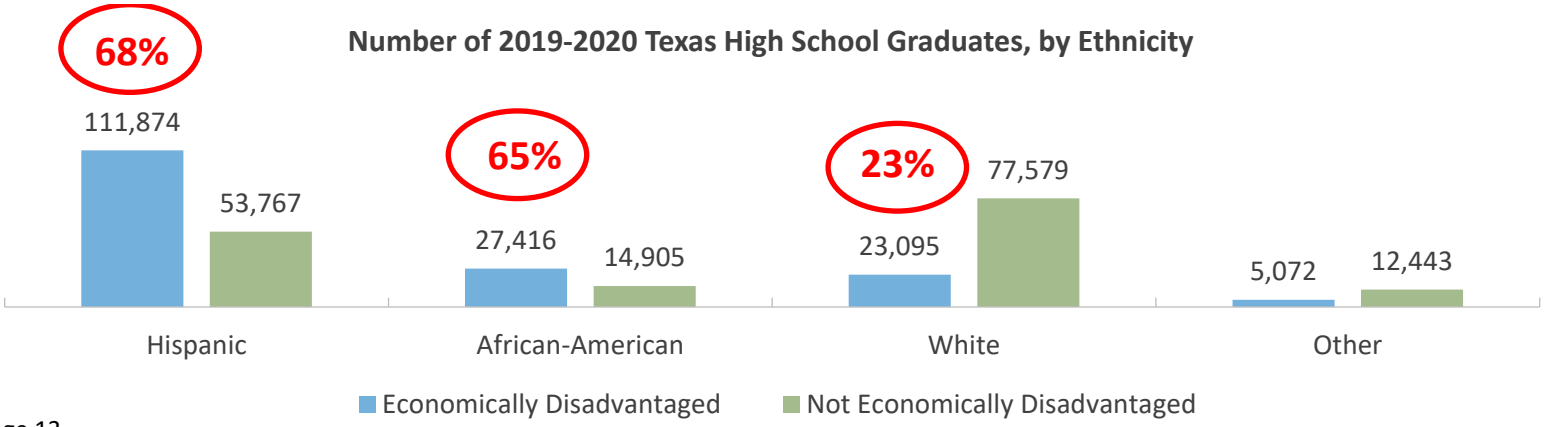
Low-Income High School Graduates





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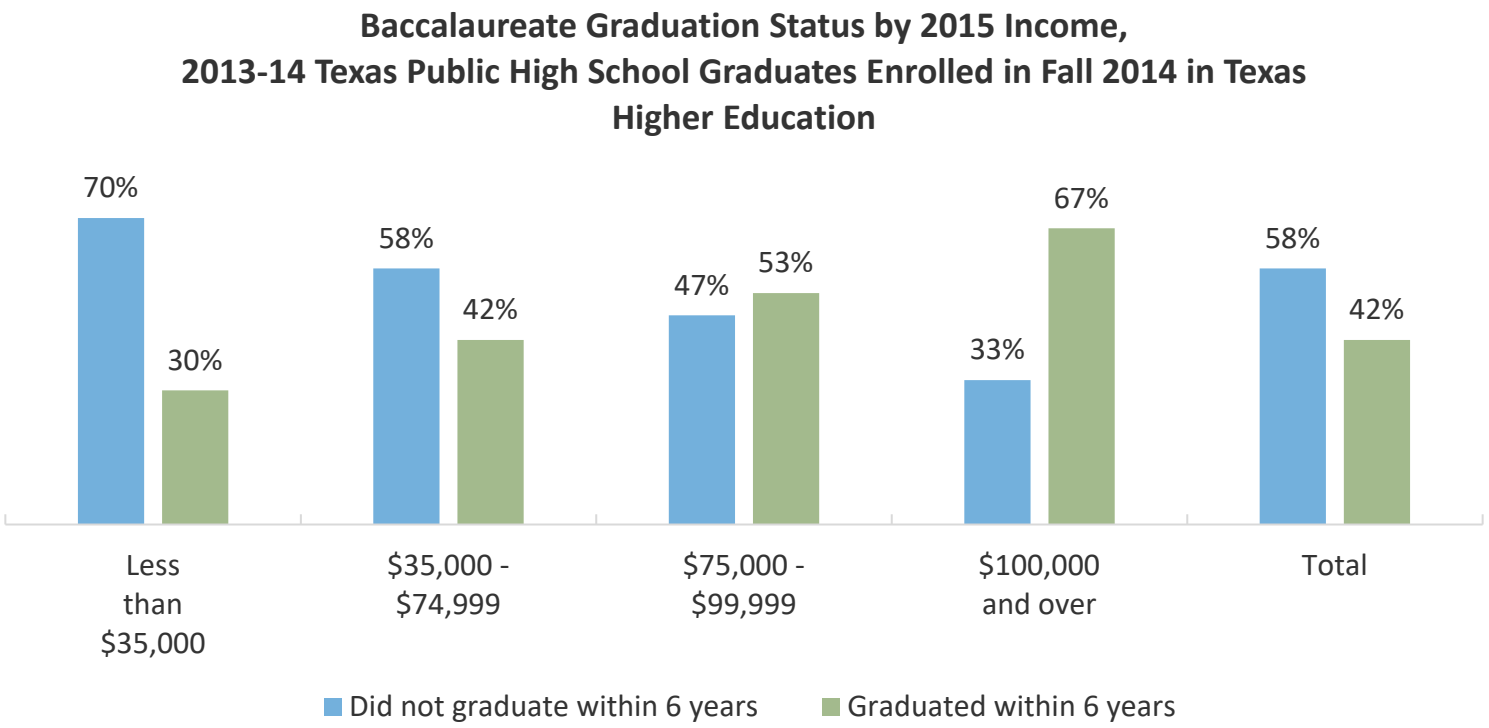
College Completion by Income



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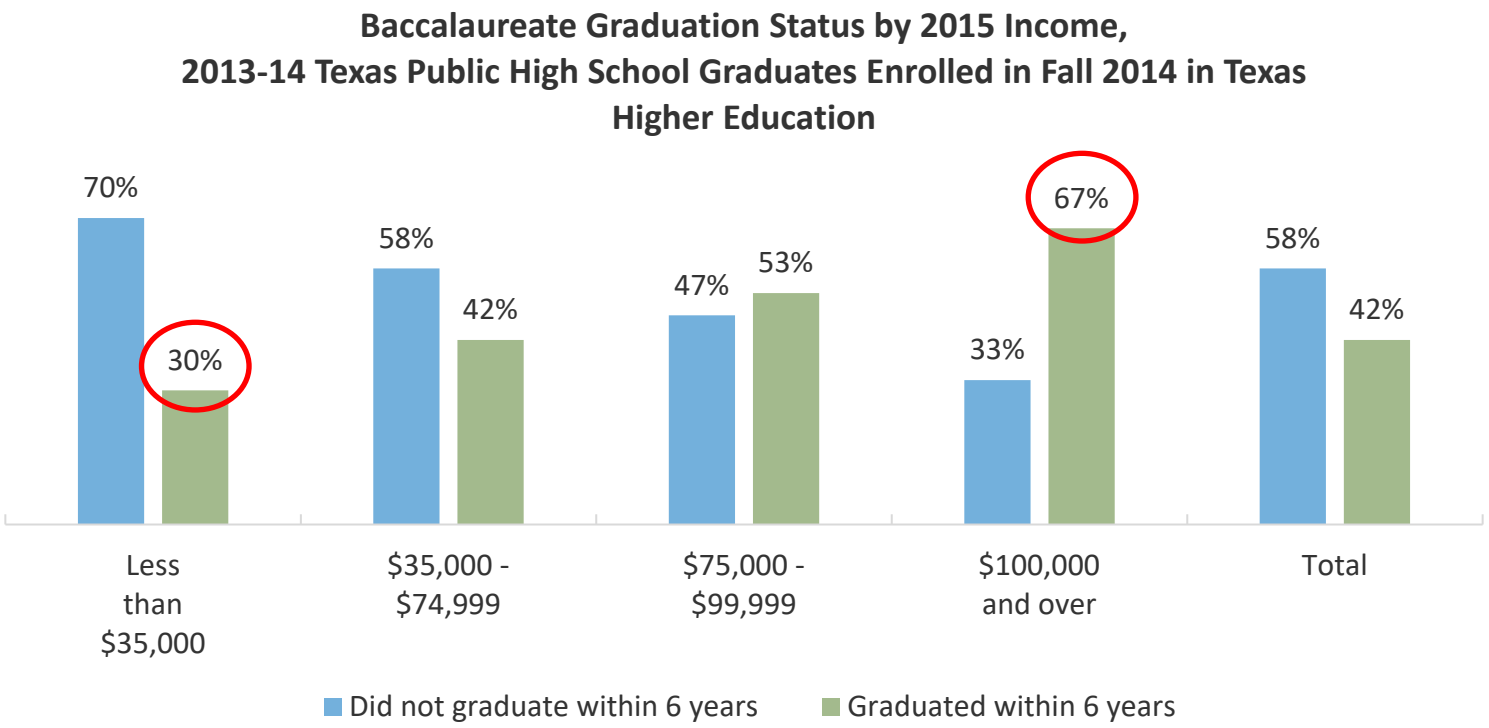
College Completion by Income



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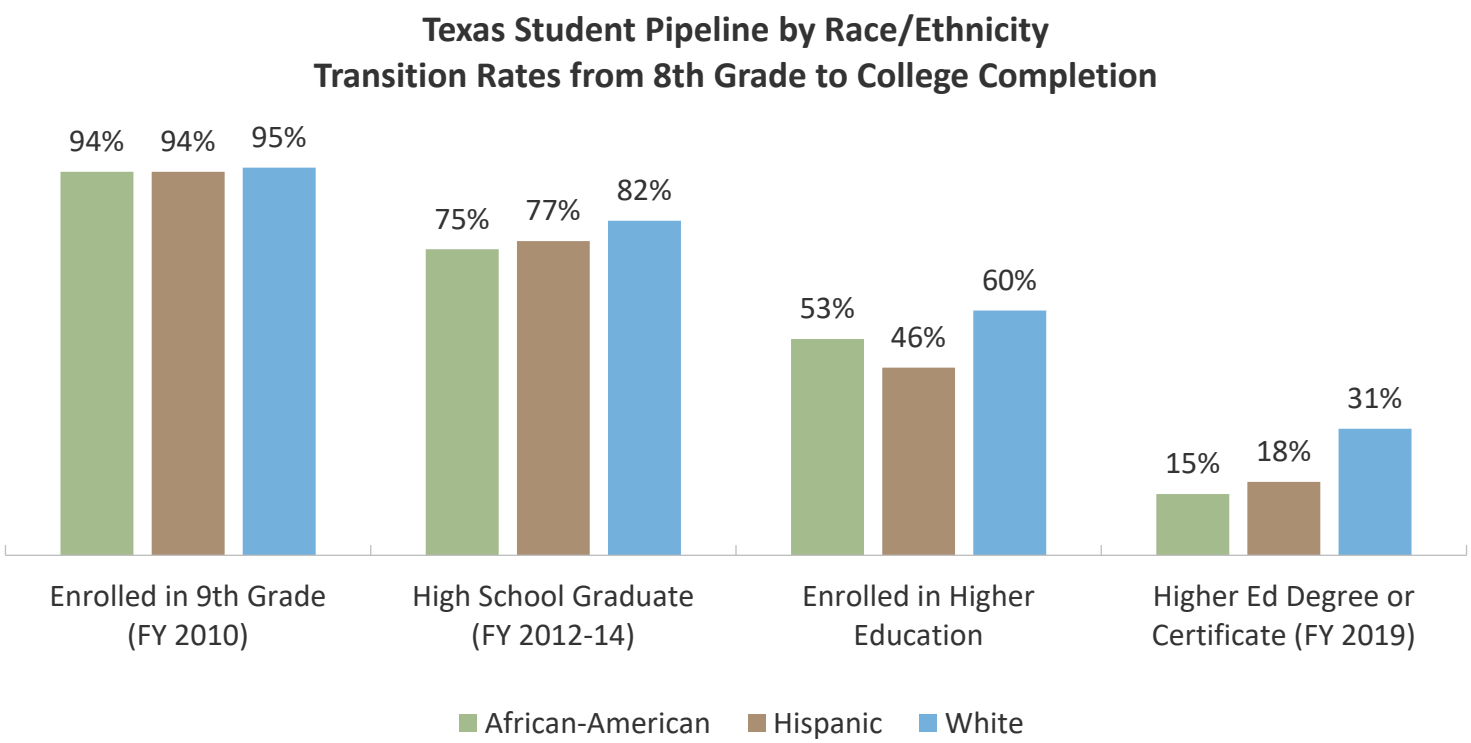
Educational Pipeline



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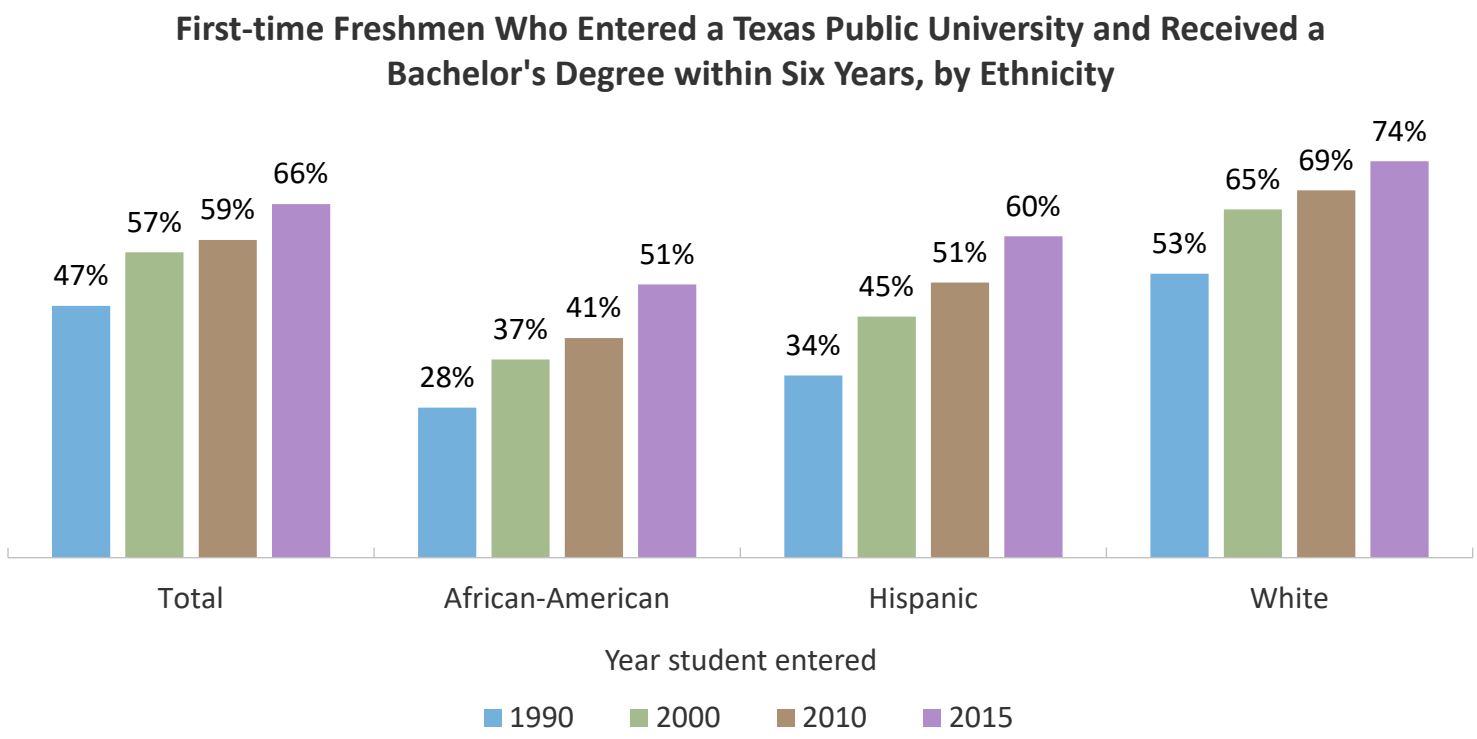
College Completion by Race/Ethnicity



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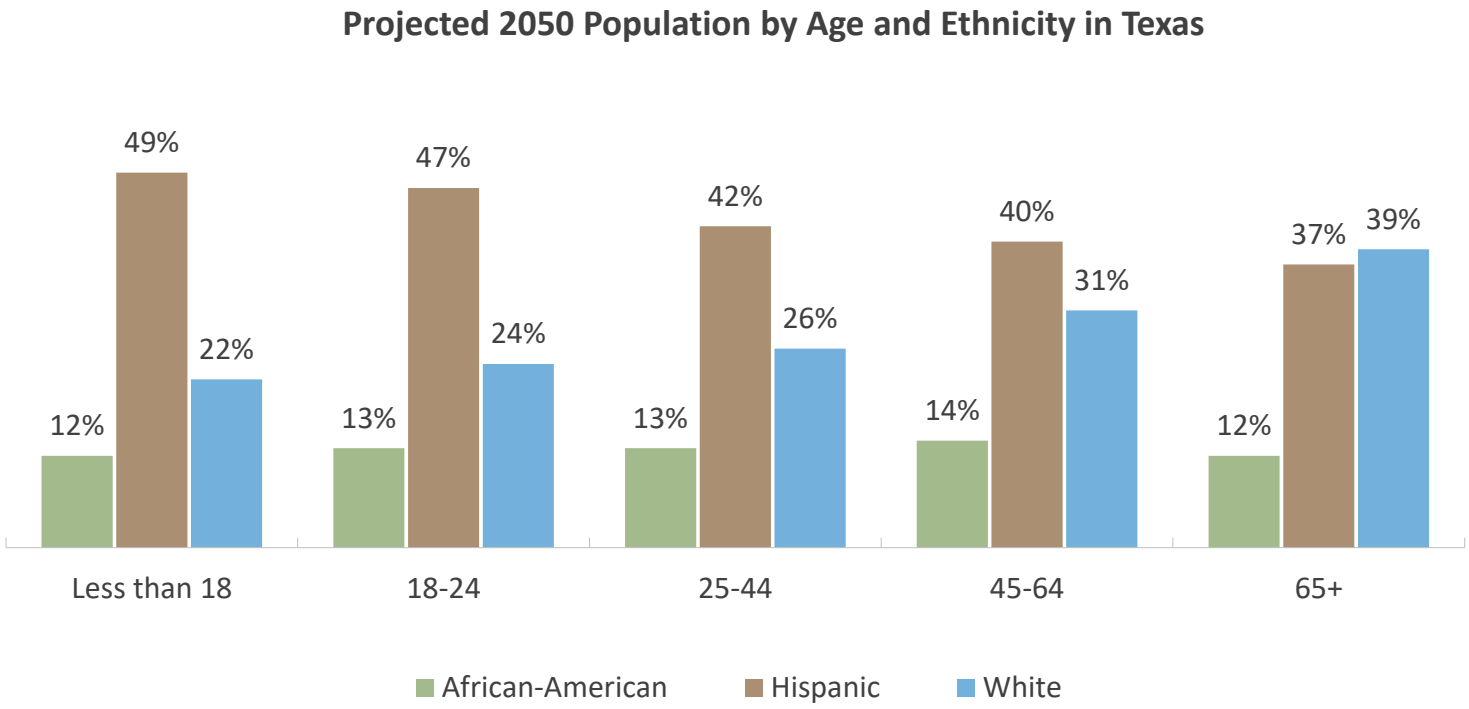
Texas' Population Projections



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Borrowing for College

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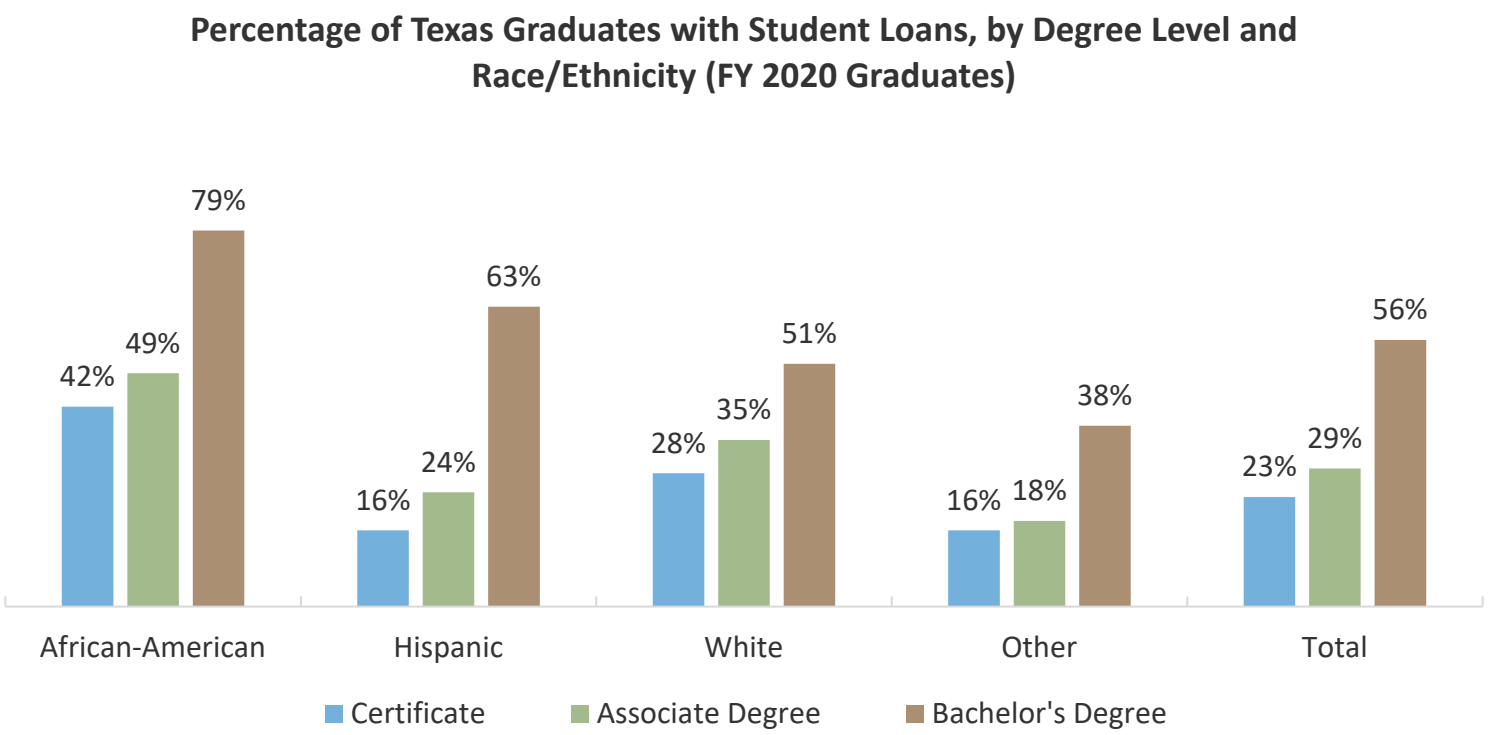
Borrowing Rates in Texas



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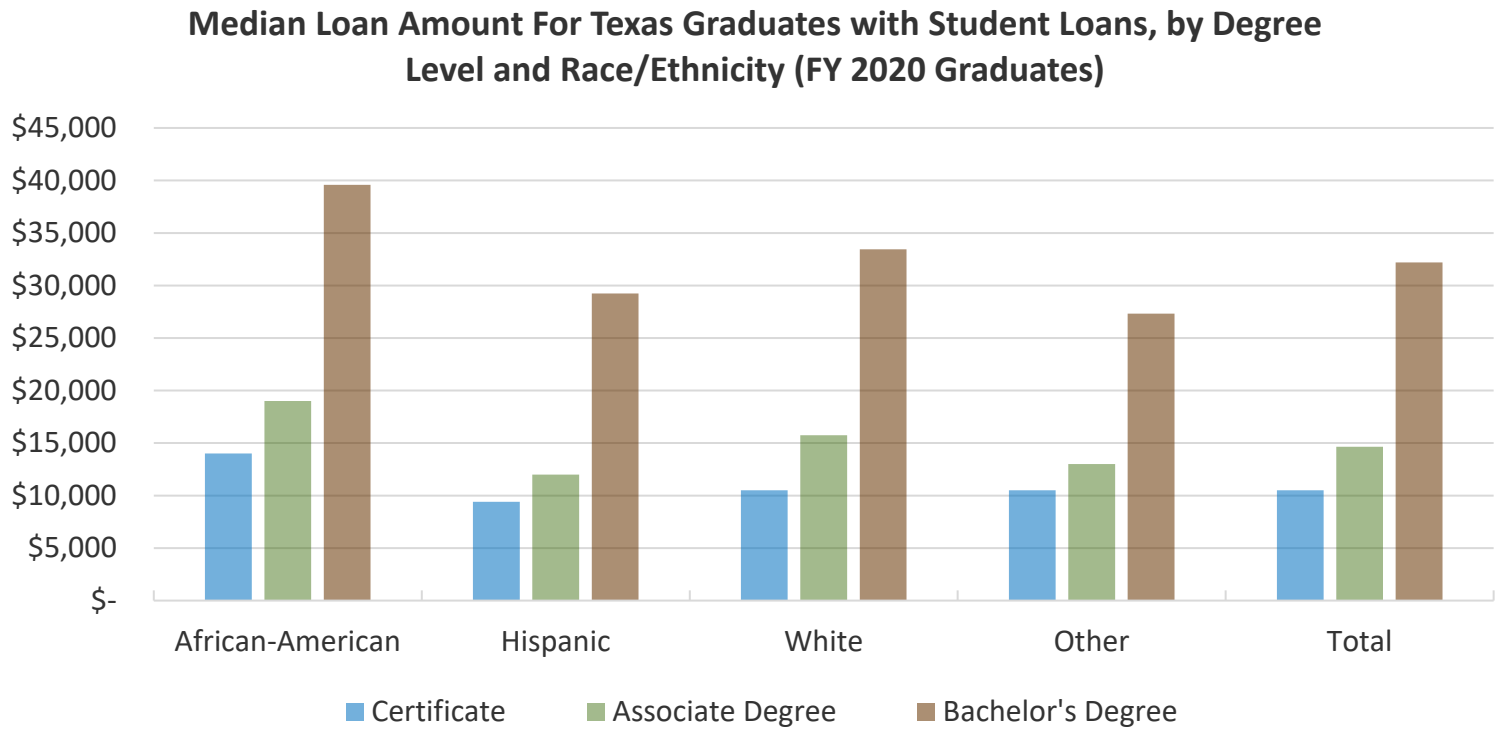
Cumulative Borrowing in Texas



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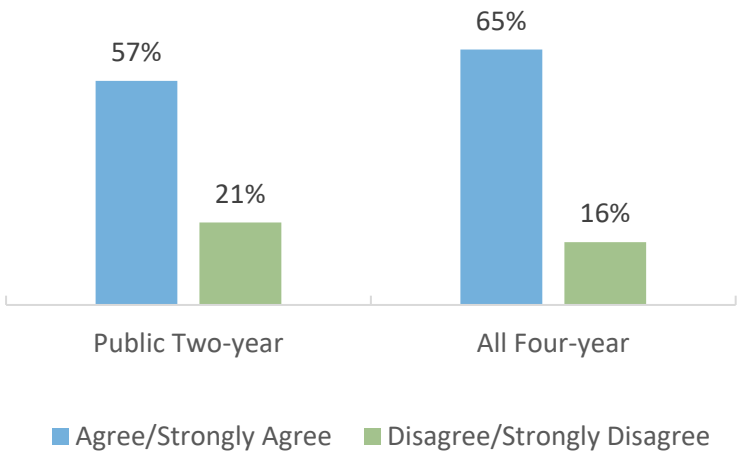
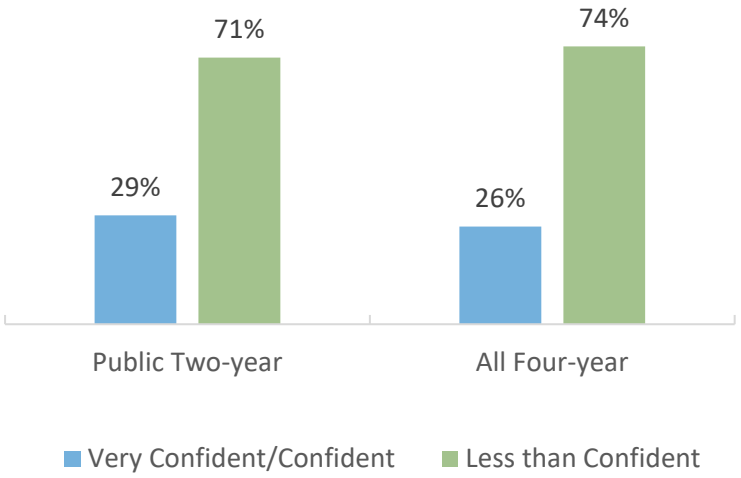
Students Worry About Loans

Q75: I have more student loan debt than I expected to have at this point. (of those who indicated having a student loan they took out for themselves)



Q76: How confident are you that you will be able to pay off the debt acquired while you were a student? (of those who indicated having a student loan they took out for themselves)



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Repayment Outcomes

Repayment Group	Percent of Borrowers	Repayment Subgroup	Percent of Borrowers
Defaulters	24%	Paused Any Payment	14%
		Missed Any Payment	10%
Balance Increasers	21%	N/A	N/A
Balance Decreasers	45%	Uninterrupted	22%
		Paused Any Payment	20%
		Missed Any Payment	3%
Consolidators	10%	N/A	N/A

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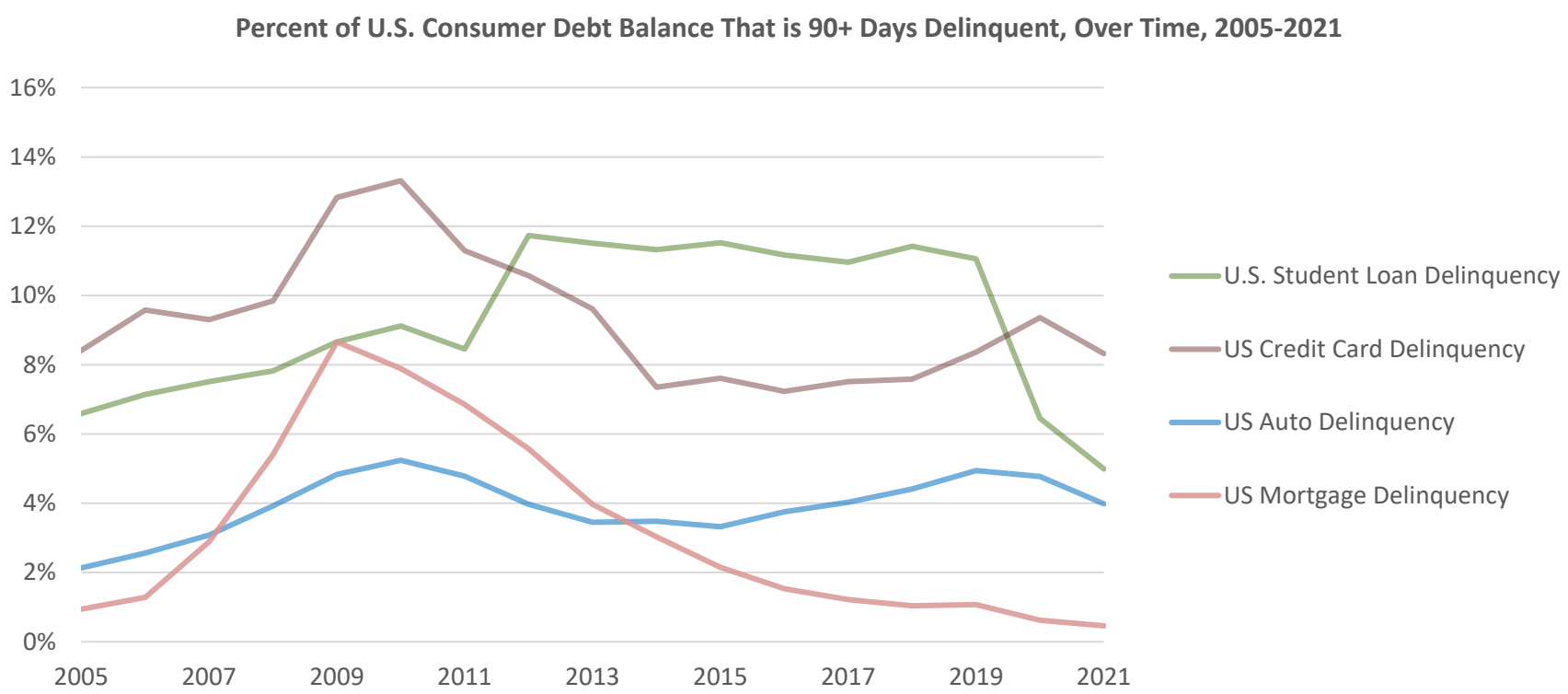
Consumer Debt Delinquency



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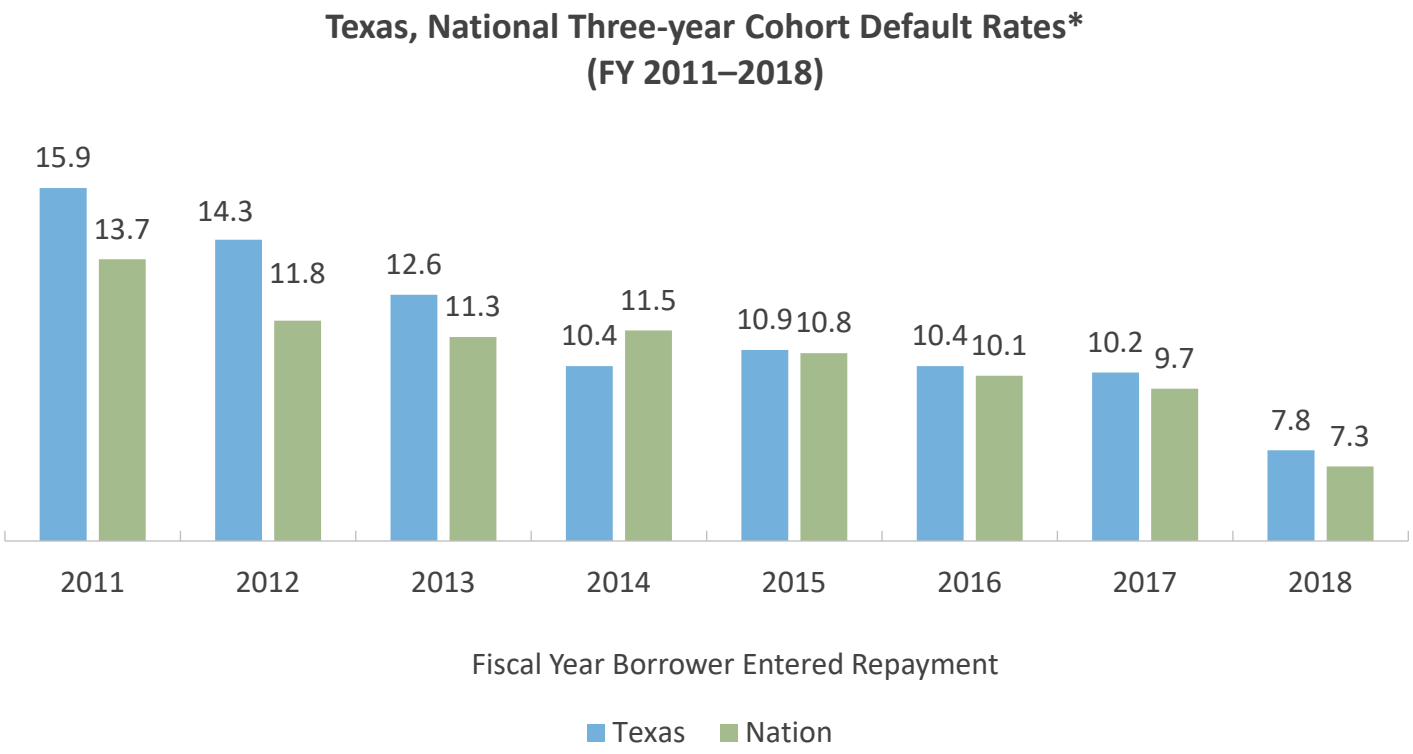
Official Cohort Default Rates



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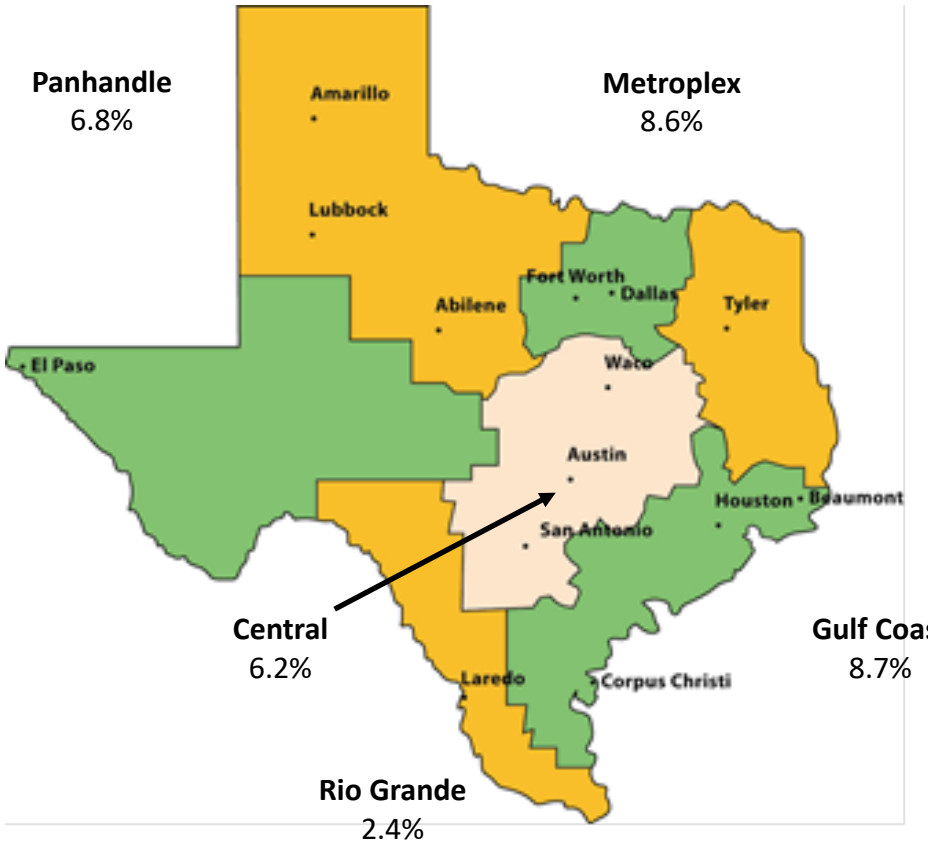
Cohort Default Rates by Texas Region



State of Texas
FY 2018
7.8%

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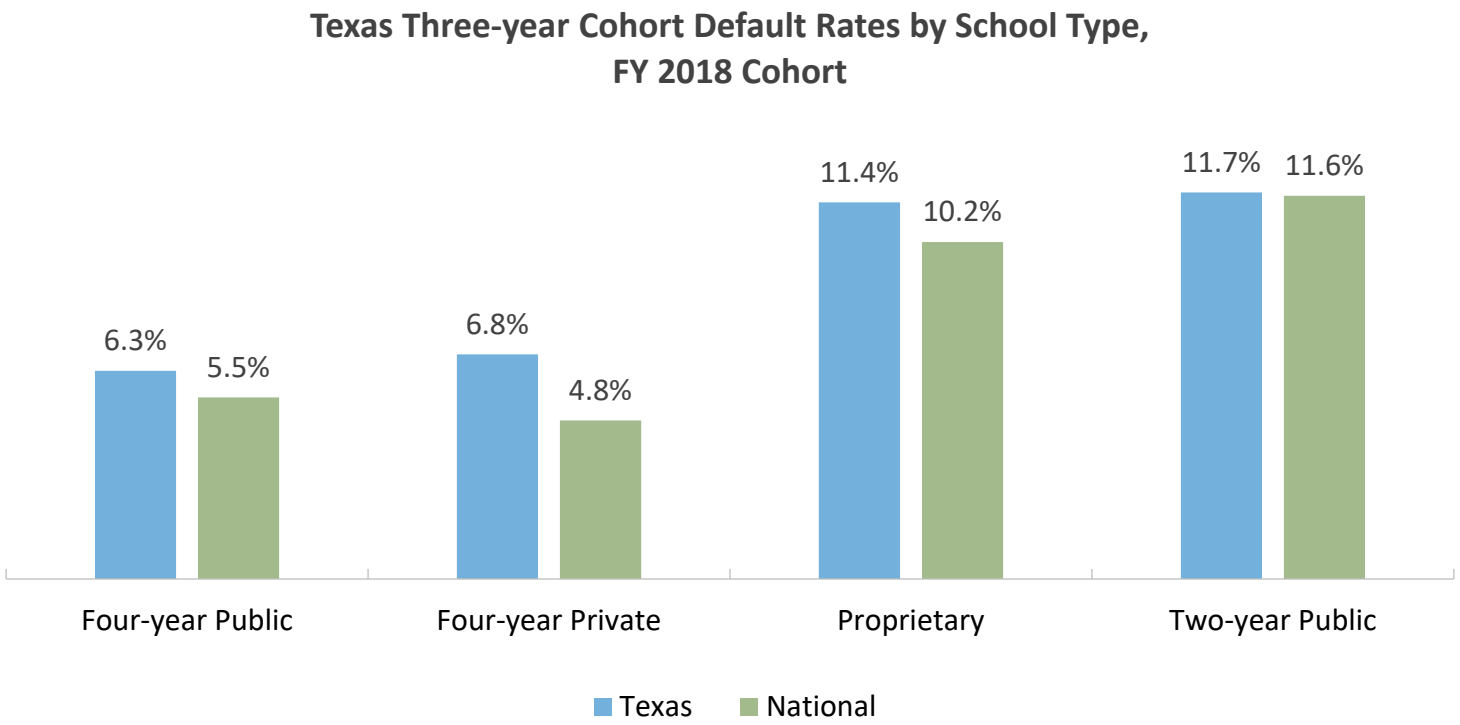
Cohort Default Rates by Program Length



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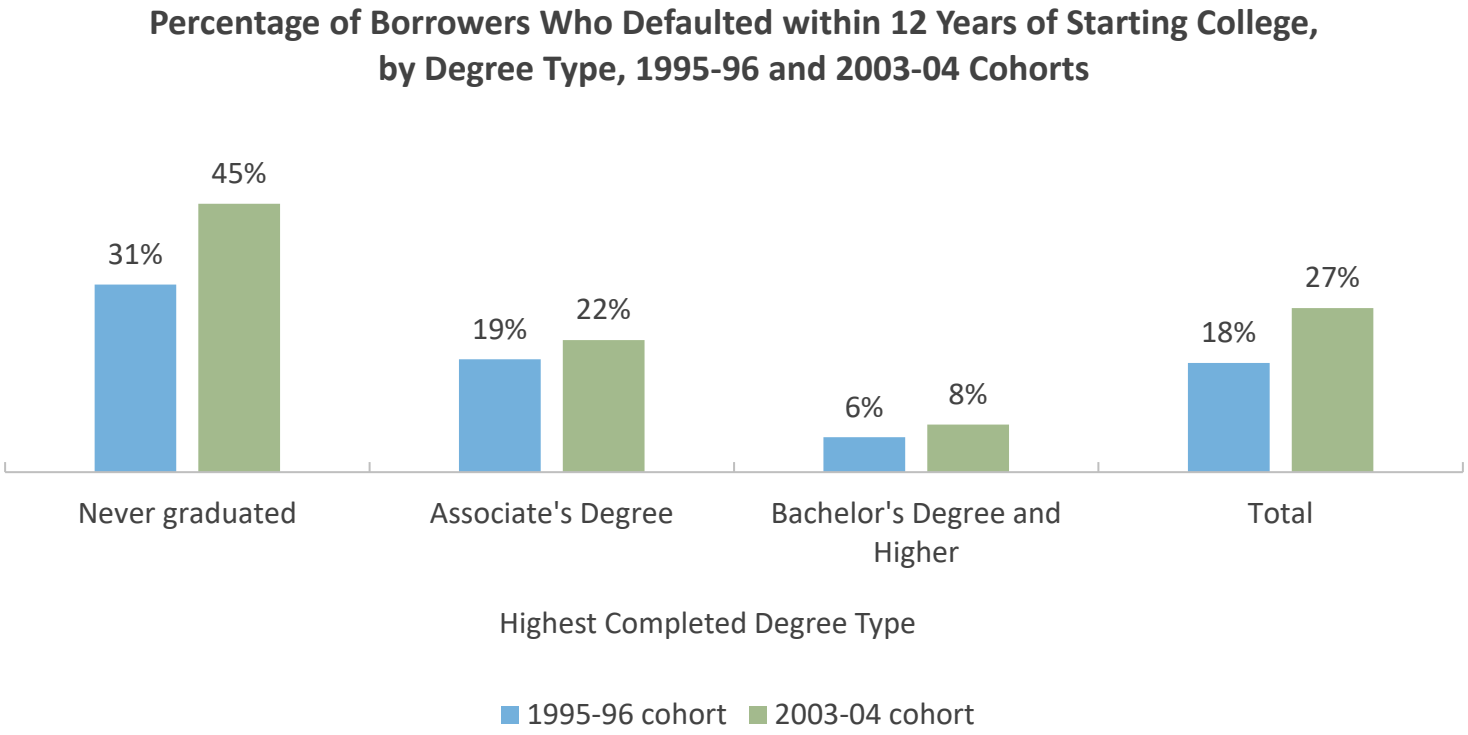
Defaults by Graduation Status



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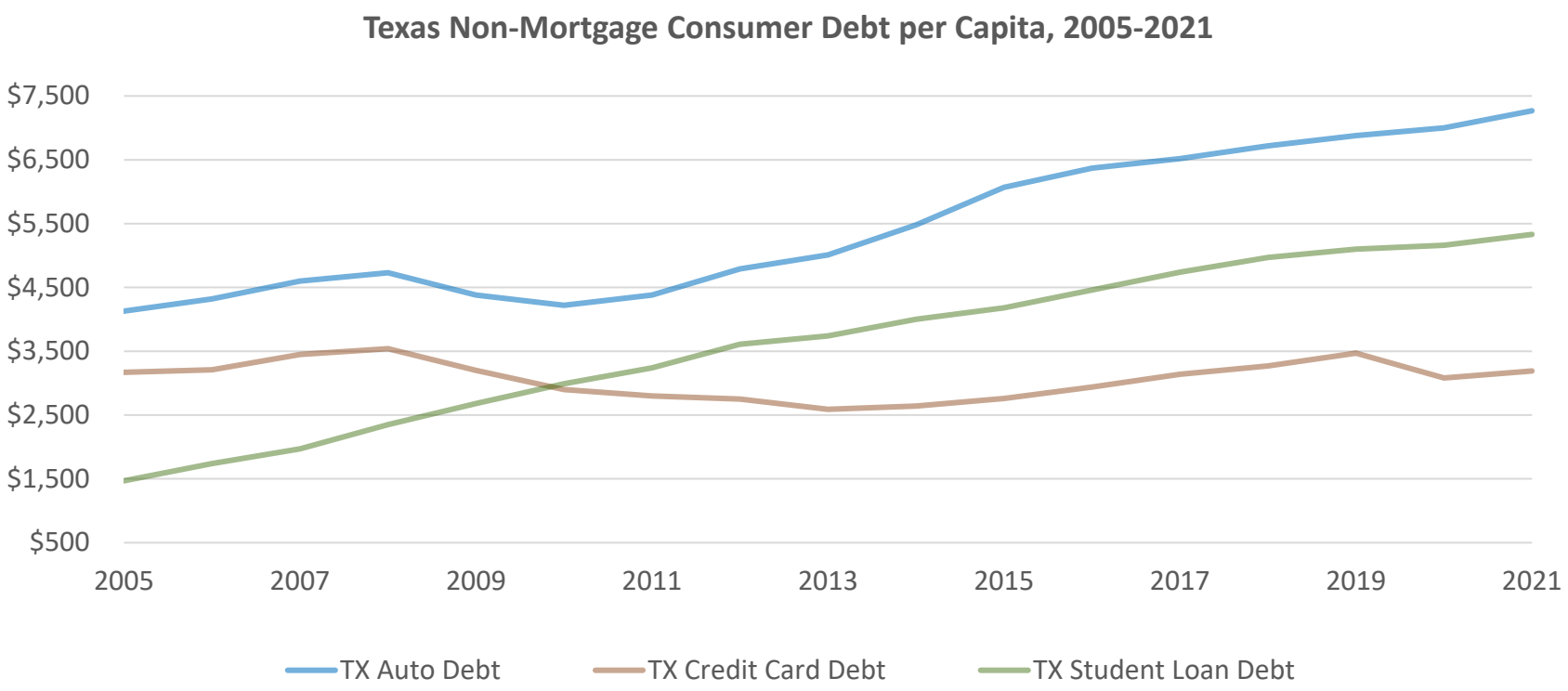
Consumer Debt Types in Texas



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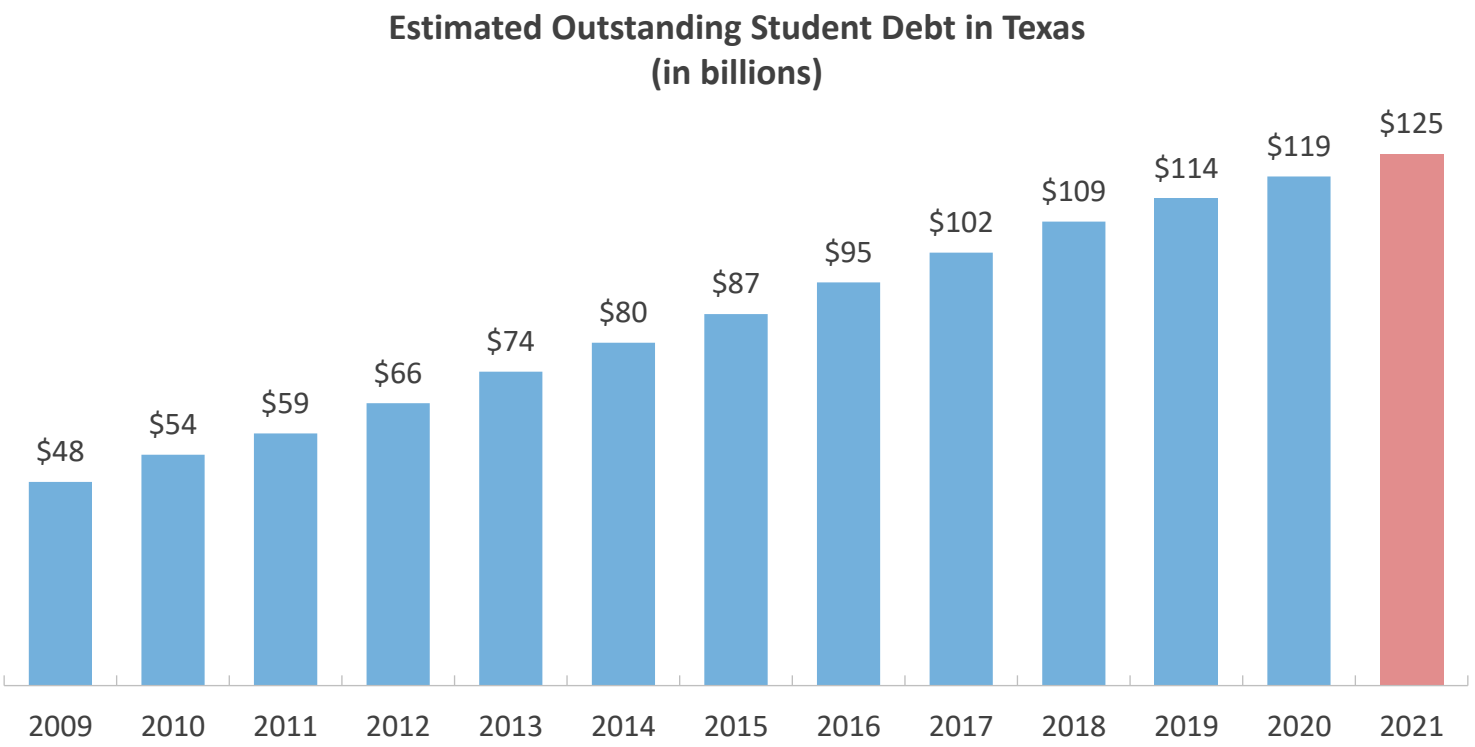
Outstanding Student Debt in Texas



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Texas Community College Students

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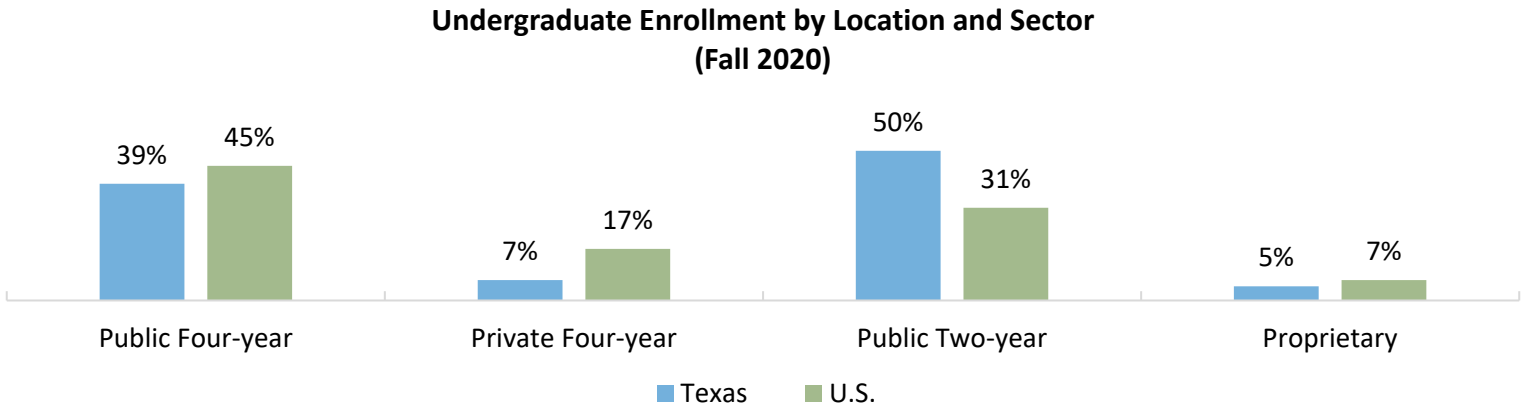
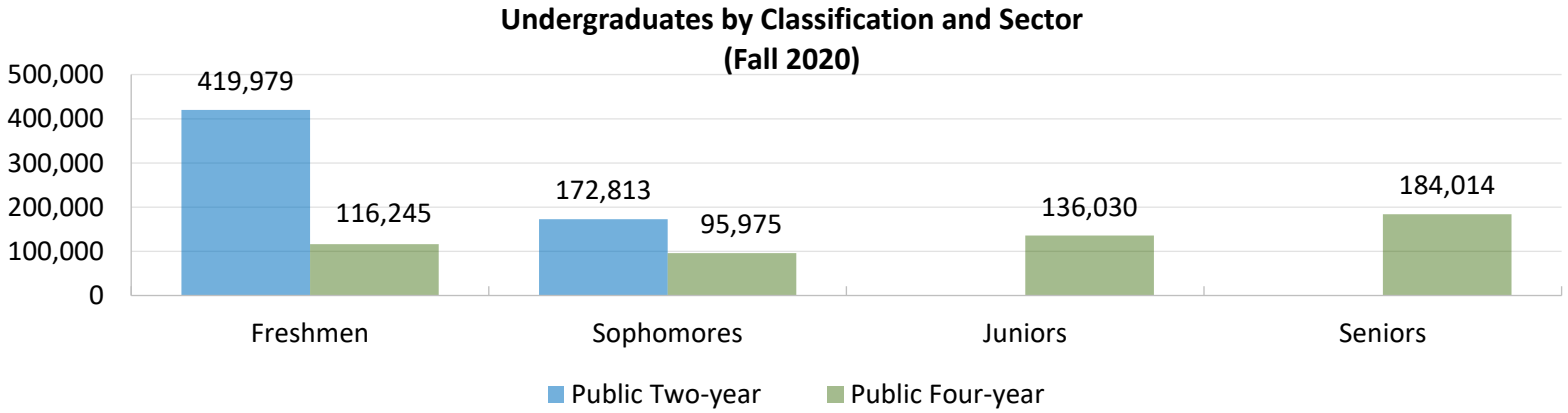
Vital Sector in Texas





Section 3, pages 17 and 19

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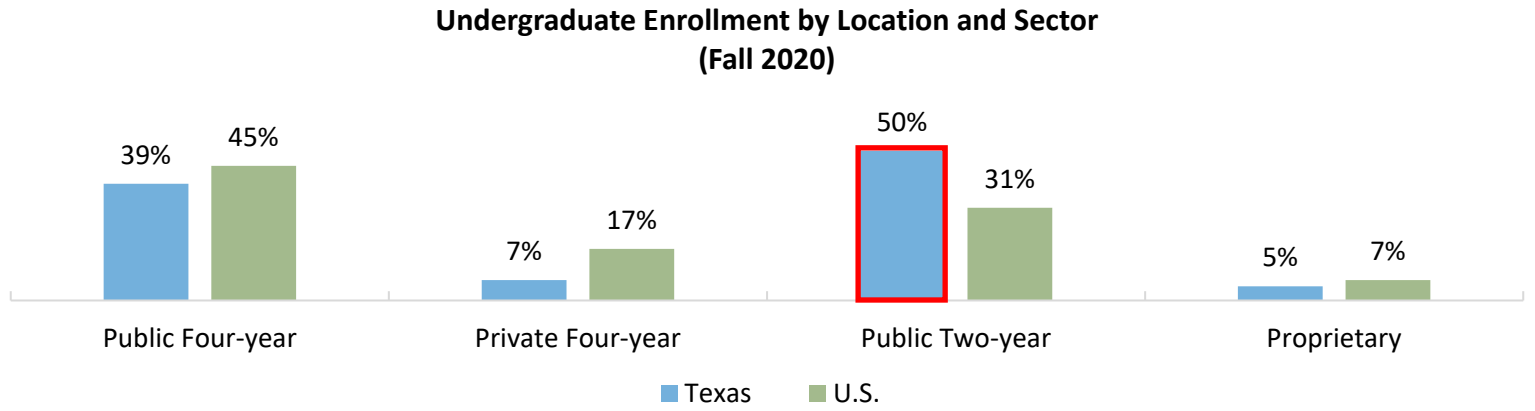
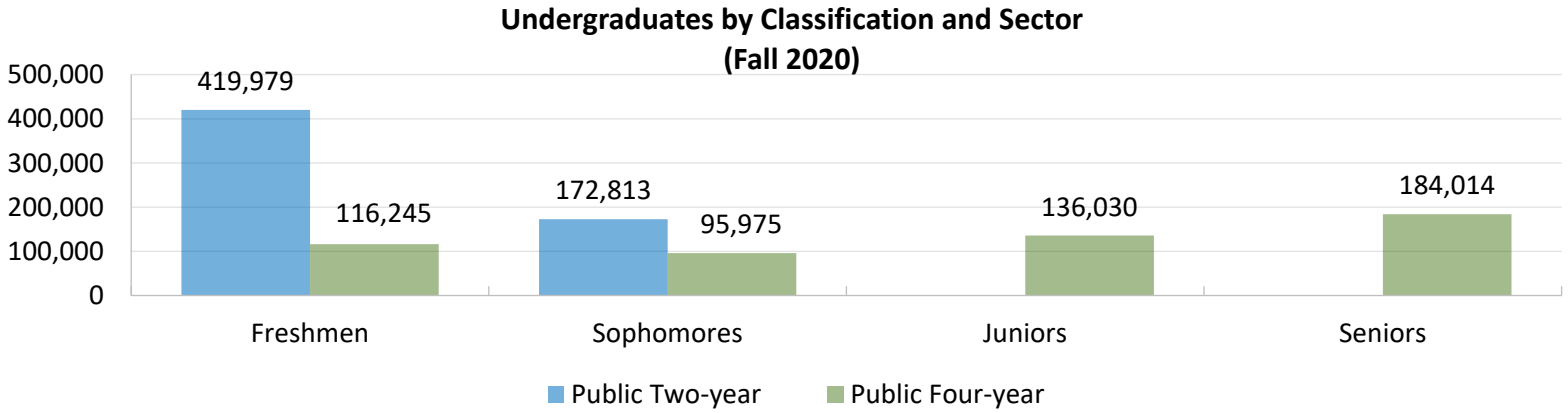
Vital Sector in Texas





Section 3, pages 17 and 19

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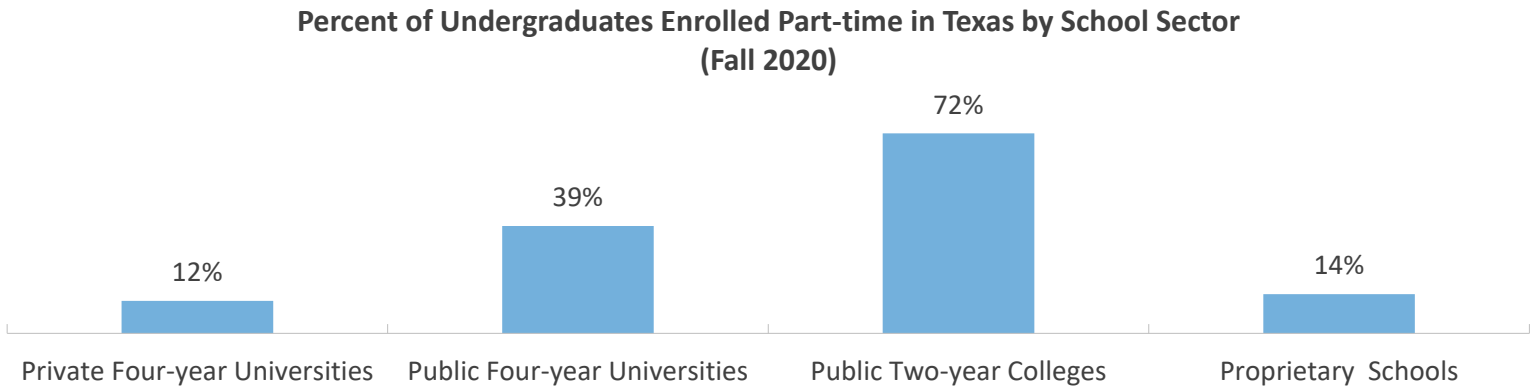
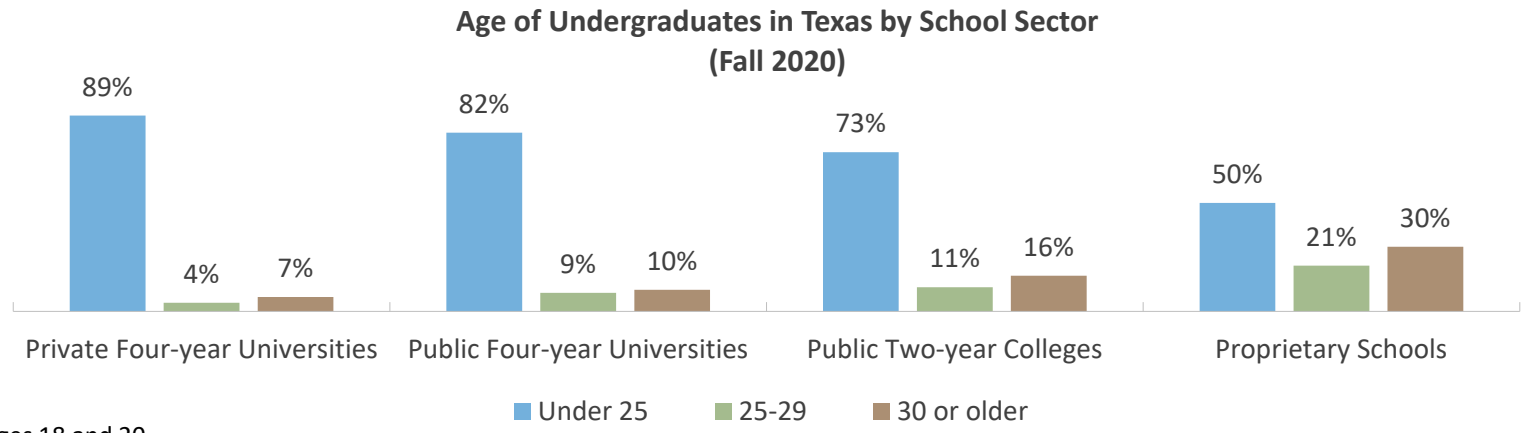
Profile of Community College Students





Section 3, pages 18 and 20

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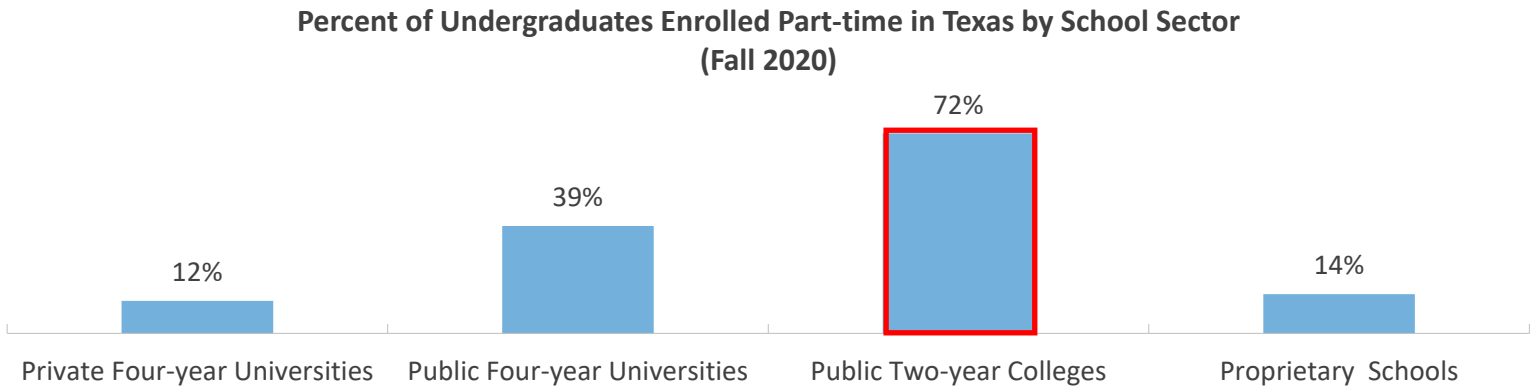
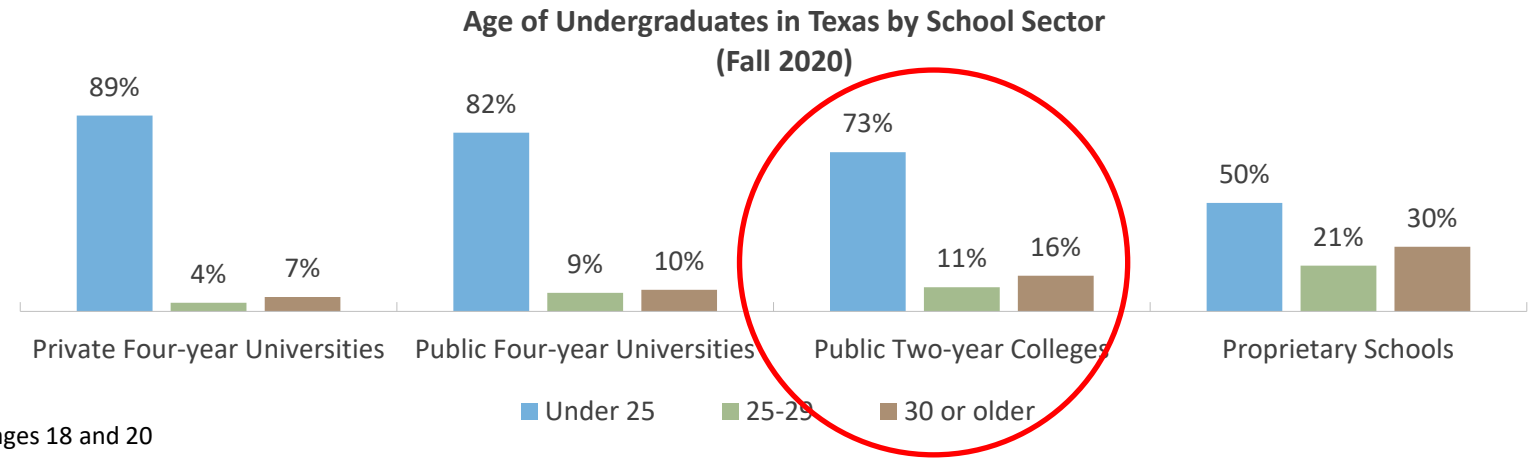
Profile of Community College Students





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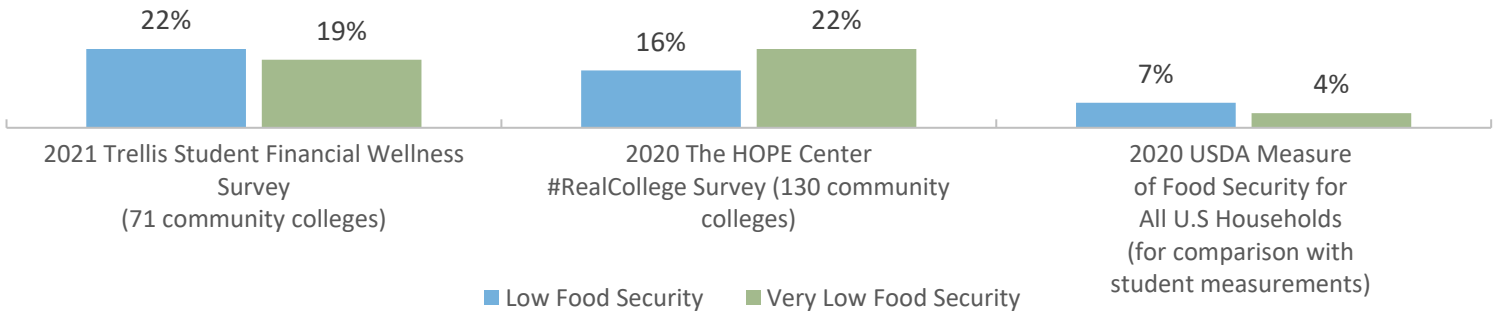
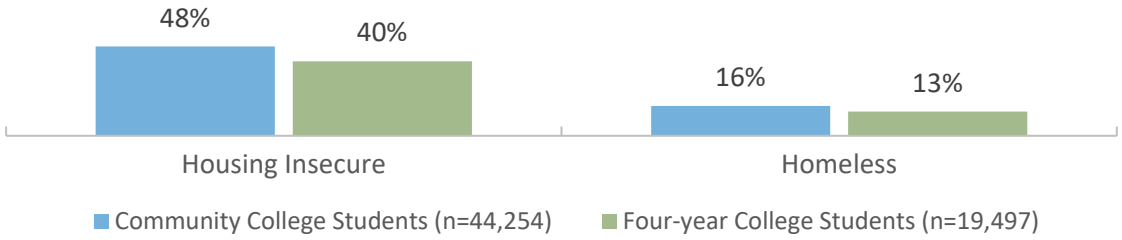
Profile of Community College Students

Recent Studies of Food Security Amongst Community College Students Using the U.S. Department of Agriculture Scale



Housing Security and/or Homelessness within Prior Twelve Months at Community Colleges, from Trellis' Fall 2019 Survey



Section 9, pages 83 and 85

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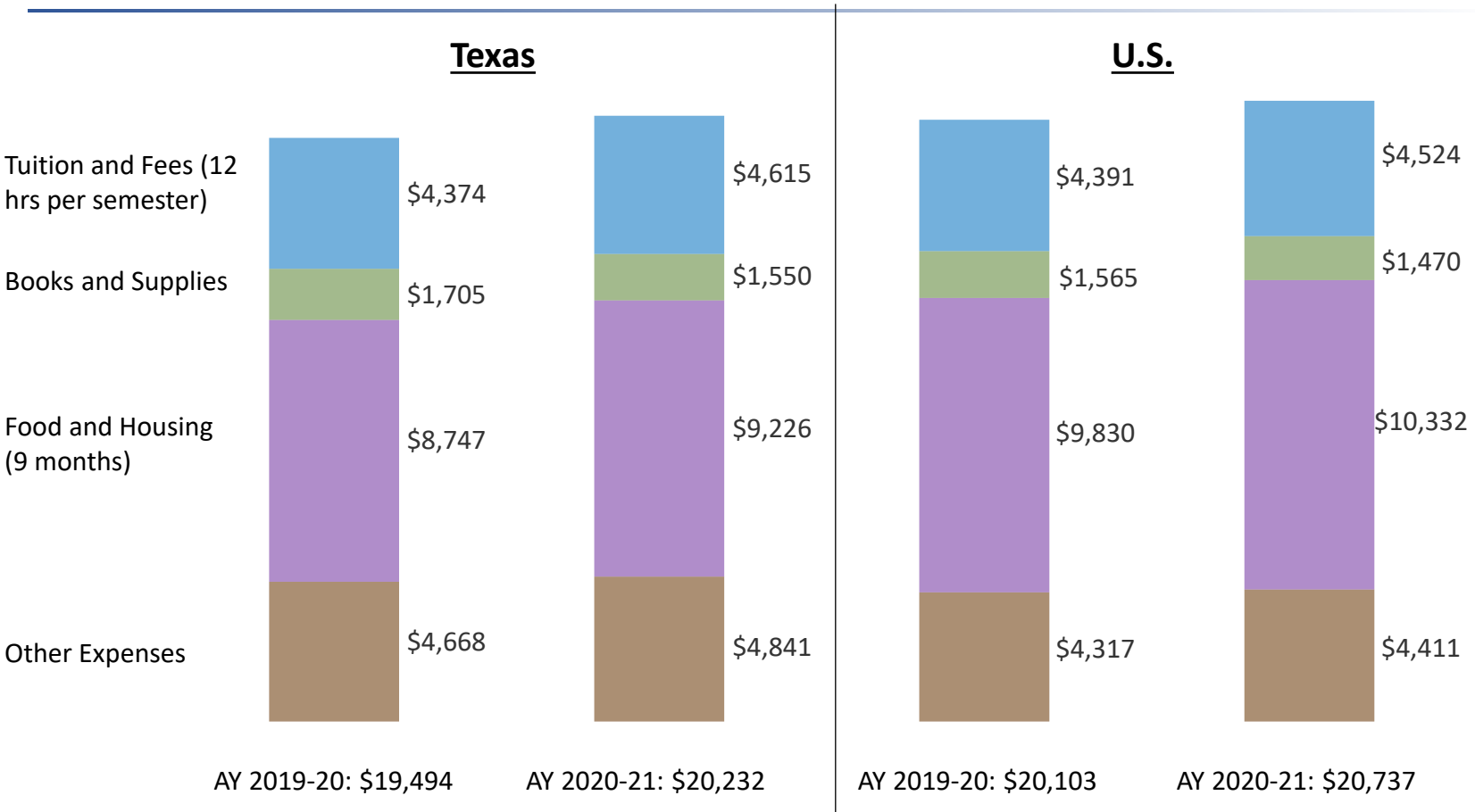
Costs at Texas Community Colleges



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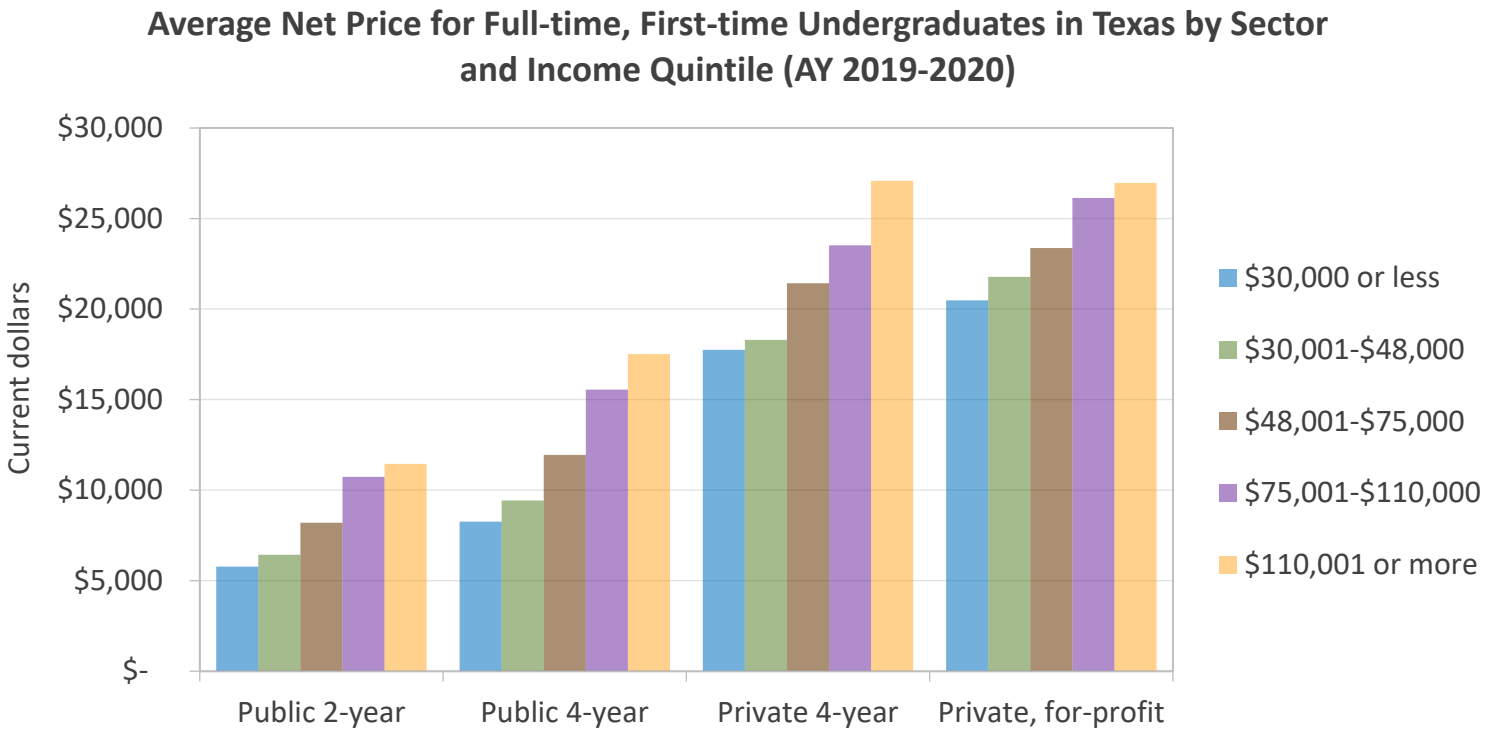
Net Price – Lower for Low-Income



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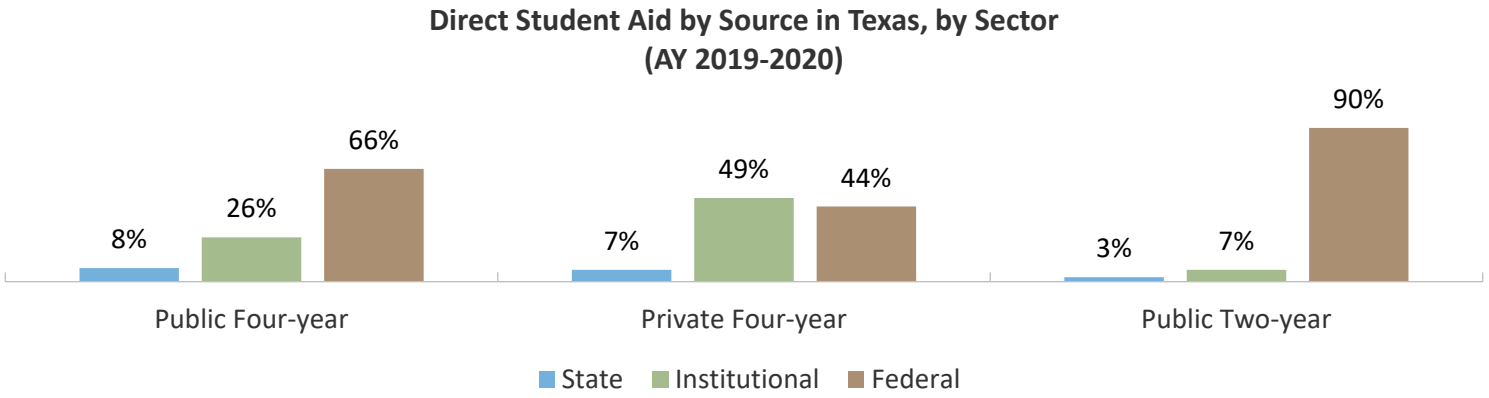
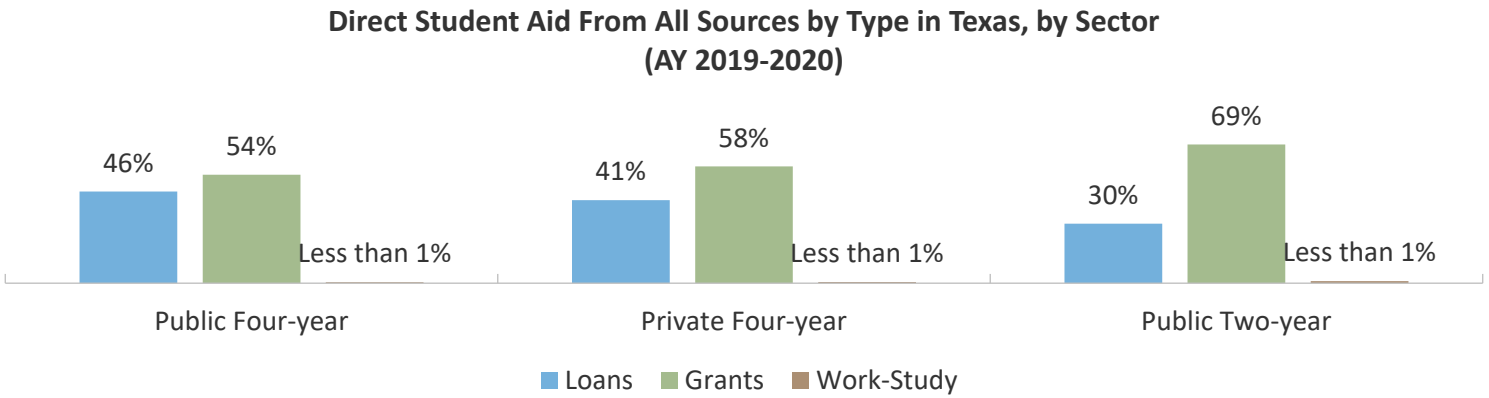
Texas Students Depend on Federal Aid





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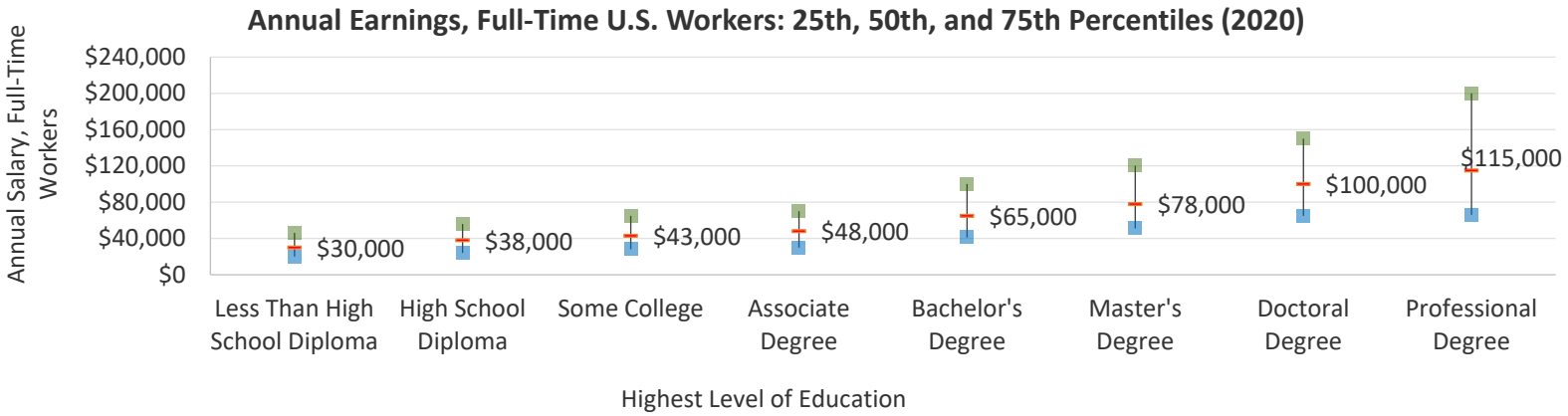
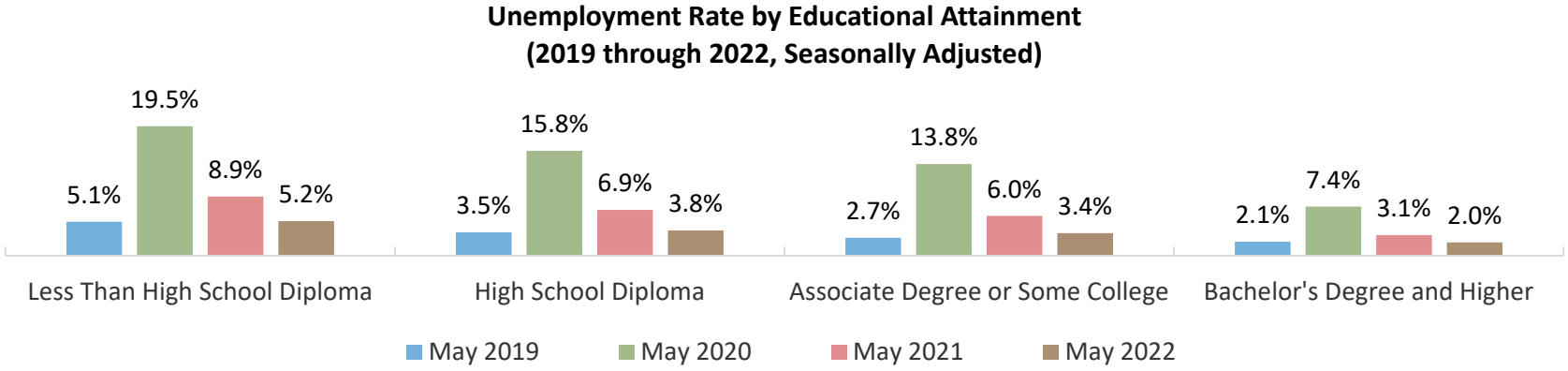
Earnings and Unemployment Rates





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Contact Information

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Carla Fletcher
Senior Research Analyst, Trellis
Carla.Fletcher@trelliscompany.org

Find the SOSA at:
trelliscompany.org/state-of-student-aid-2022

Trellis Research Newsletter
Trelliscompany.org/research/data-trends-and-insights

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AGENDA

FAAC Data Collection Sub-Committee Meeting
Nov. 17, 2022: 9:30–11:30am

Location: 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: 212 410 823#

Update on Online TASFA

This topic will provide an update on the progress of the online TASFA, as well as the paper application.

Update Online TASFA:

- We are continuing to refine the Online TASFA and are progressing with our internal and external user acceptance testing.
- There is not a solid date for the release of the online TASFA.
- For 2023-24, we suspect that many students have already applied so the number of students may be small which will help with the refinement of the application.
- Working on a new portal system that will replace CBPASS to login into the application.
- Working on the signature page that will allow for touch screen or to draw their signature.
- There will be changes to the test file; currently THECB is doing internal testing of the test file
- Updating the file format into fixed length but will have a CSV version to view but not to import

Update on Paper TASFA

- New look and feel of the paper application
- New color scheme and branding
- The flow was redesigned to align with the online TASFA once launched
- No additional elements but eight questions removed based on the recommendations from the TASFA Subcommittee.

- Aligned the language in the TASFA with the FAFSA
- Add a place for College Information and designate the housing status at the school.
- Added the student ID at the end of the paper TASFA.
- Redesigned the TASFA NOTES section to align with the TASFA; much longer than before.

Committee Comments:

- **What are the regulations for the schools to use the online TASFA?**
  - The rules are written to where the schools must accept the data from the state application.
  - We will be working on guidance for those schools that continue to use their own TASFA.
  - All schools will be required to accept the data by Oct. 1, 2023.
- **Can the file be printed into a TASFA Application**
  - For the introductory go live, the functionality will not be ready before the Go Live.
  - There is a long-term plan to enhance capability to include an administrative portal.

Update on FAD Data Modernization

This topic will provide an update on the progress made on the modernization project and the user access testing (UAT).

Update:

- We are ready for beta testing for the data submission portal for cycle three. Information will be sent to six schools that tested previously.
- We will be beta testing 2023 FAD Cycle One in January with the goal of launching the new submission portal in February 2023.
- Will be adding four new data elements to cycle one for the 2023 FAD file:

114) NEW Texas First Scholarship POSITION 442-446	Numeric XXXXX	5 characters, right justified Range 0 – 99999
115) NEW Bilingual Education POSITION 447-451	Numeric XXXXX	5 characters, right justified Range 0 – 99999
116) NEW Educational Aid Exemption (EAE) POSITION 452-456	Numeric XXXXX	5 characters, right justified Range 0 – 99999
117) NEW Educational Aid Exemption (EAE) Match POSITION 457-461	Numeric XXXXX	5 characters, right justified Range 0 – 99999

Committee Comments:

- Would like to the four new data elements shared for programming in advance.

Update on Office of SFAP:

This topic will provide an update on the activities happening in the Office of Student Financial Aid Programs.

Topics of Discussion:

- THECB Redesigned Website
- FORWARD Loan Program
- Released and Upcoming Announcements
- New Staff Hires

Update:

- **THECB** is in the process of performing a soft launch of a newly redesigned website. The color scheme and the navigation from page to page is very different. We are still working on a few areas before we do a full launch.
- **FORWARD Loan** Program is schedule to launch on January 15, 2023. The Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Program provides alternative educational loans to Texas students who are unable to meet an institution's cost of attendance (COA).

- **Eligibility Requirements**
  - The student must:
    - Be classified by the institution as a Texas resident
    - Be registered with Selective Service, or be exempt
    - Meet the satisfactory academic progress requirements set by the institution
    - Receive a favorable credit evaluation or provide a cosigner who has good credit standing and meets other requirements
    - Be pursuing a High-Demand Credential
    - Eligibility for the program ends two years from the start of the semester in which the student received the first loan through the Program
    - Additional enrollment requirements:
- If enrolled in a degree program, must have completed at least 50% of the required coursework prior to receiving a loan through the Program.
- If enrolled in a non-degree program, the program's duration must be less than two years.
- If enrolled in master's degree coursework, the master's degree must be part of a combined baccalaureate-master's program approved by the institution of higher education.
- **Loan Amounts:**
  - Annual: Cost of attendance less other financial aid and family resources
  - Aggregate: Cannot exceed manageable student loan debt as determined by the Texas Higher Education Coordinating Board
  - An origination fee will not be assessed for all approved FORWARD borrowers.

- **Interest Rate:**
  - Interest begins to accrue on the outstanding principal from the date of disbursement using simple interest.
  - Loans are not eligible for interest subsidy, but the interest is not capitalized.
  - Interest is currently a fixed annual rate of 2.00%.

- Additional Information:
  - **Where can they learn more about this program?** Rules have been written for the FORWARD loan program and are in public comment period. Once Rules are finalized and approved, they would be available to schools. Also, information such as Fact Sheet, Program Comparison Chart, and Program Guidelines will be program resources for schools.

More information can be found after rules are adopted: Coordinating Board Rules, Chapter 22, Subchapter C and the Texas Education Code, Chapter 52.

- **What are the eligible high-demand credentials for the launch?** Nursing/Patient Care, Teaching, Transportation/Logistics, Energy (223 separate CIP codes under these four disciplines)
- **Are CIP codes specific to certain schools? How will schools know if they exist at their school?** The CIP codes are not specific to certain schools.
- **Who at the institution is responsible for confirming eligibility?** Whoever currently certifies CAL loans would more than likely be responsible for confirming eligibility. However, we don't think we would stipulate who is responsible for confirming eligibility at the school. That should be a school decision.
- **How will they be notified when a certification is ready?** A CSV file will be uploaded to their folder in MoveIT.
- **How do schools certify?** School certification will occur in HelmNet.
- When will training be provided? TBD
- **Will there be resources available to help navigate through the program (i.e., eligibility, loan management, returning funds, FADs, etc.) and when will those be released?** Fact Sheet and Program Comparison Chart are currently in development. It is our understanding that FAS will be creating Program Guidelines for FORWARD. In addition, information will be on the various Agency websites. A soft launch of the program is scheduled for the Spring semester, a more robust launch later in the Spring for the Fall semester start.
- **When will additional credentials be added?** No set timeframe but assume new credentials will be added prior to the Fall 2023 semester. We would not anticipate new credentials mid-semester, but it could happen.

- **Financial Aid Personnel Activity**, we have been busy with hiring and promoting internal staff. To date, we had
  - Retirements: 2
    - Manager and Program Specialist III from Workforce Aid (Loan Repayment) retired in Oct and at the end of Nov.
  - Promotions: 3
    - Tanitia Colter was promoted to Director of Operations
  - New Hires: 1
    - New Program Specialist I for our Operational team will start on Dec. 12

- Vacant: 5 vacancies
  - 1-Manager and 1 Programs Specialist III for our Workforce (Loan Repayment) team
  - 2-Customer Services Rep III for our Student Aid (TASSP and Loan Origination) team
  - 1-Program Specialist III for our Operational team

- **Recent Memos:**
  - 10/13/2022 Educational Aide Exemption (EAE), Bilingual Education, and Texas College Work-Study (TCWS) 2022-23 (FY 2023) Revised Final Allocations Memo [PDF]
  - 09/30/2022 Texas Application for State Financial Aid (TASFA) 2023-24 Memo [PDF]
  - 09/28/2022 Financial Aid Database (FAD) Reporting Cycle 3 - FY 2022 (2021-22) Memo [PDF]
  - 09/23/2022 2021-22 (FY 2022) State Campus-Based Annual Report Memo [PDF]
  - 09/14/2022 Revised Final Grant Allocations for 2022-23 (FY 2023) Memo [PDF]
  - 08/26/2022 ALERT: 2023-2024 Texas Application for State Financial Aid (TASFA) Dear Colleague [PDF]
  - 08/18/2022 State Financial Aid Reminders, Process and Resource Updates Memo [PDF]
  - 08/05/2022 State Financial Aid Processing Schedule Update Memo [PDF]

- **Upcoming Memos**
  - Spring 2023 Institutional Calendar-finalizing deadline dates
  - 2022-2023 Bilingual Education Biennium Report-impacts seven schools
  - FY2023 FAD Manual
  - Spring 2023 Transfer Grant

- **Upcoming deadlines:**
  - Certification Deadline date for FY22 FAD Cycle Three-12/5/2022
  - FY2023 TASSP Nominations from Legislators-12/31/2022

- Past Deadlines
  - FY 2022 State Campus Based report and TEG Guidelines

Committee Comments:

- Will the FORWARD program be added to the FAD file?
  - Yes, it will be starting in cycle 2 for 2023 FAD file submission. The data element will be sent within the FAD manual.

Discussion Topic: Changes to the Texas College Work-study (TCWS) and Work-study Student Mentorship Programs (WSMP)

This topic will discuss the changes to TCWS and WSMP programs that were adopted based on the Negotiated Rule-making Committee

Specifically, the amendment to CHPT 22G modifies the Texas College Work-Study Program allocation process based on the consensus reached by the negotiated rulemaking committee. The adopted amendments (in addition to revisions affecting 19 TAC §22.2 and §22.135) are necessary to implement the substantive changes upon which the Negotiated Rulemaking Committee on Texas College Work Study reached consensus (May 10, 2022).

Section 22.128 is amended to add the definition of forecasting to be used in the allocation methodology.

Section 22.133 is amended to alter the allocation methodology used for the Texas College Work-Study Program and the Work-Study Student Mentorship Program, beginning with Fiscal Year 2024. The consensus reached by the negotiated rulemaking committee includes combining the Texas College Work-Study Program and the Work-Study Student Mentorship Program allocations into one allocation methodology, using the average of three years of data when calculating allocations, providing allocations for each year of the biennium at the same time, providing additional weight in the methodology for students enrolled three-quarter-time, aligning the Expected Family Contribution used for allocation purposes with the federal Pell Grant program, and indicating how reductions in funding would be handled. Aspects of the allocation rule regarding reallocations and summer awards are removed, as they are no longer relevant.

Specifically, the amendment to CHPT 22A will modify subsections (1) through (3) to integrate the work-study disbursement process. Subsection (4) is removed, as it will be replaced by Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter G, §22.135.

§22.2. **Timely Distribution of Funds.**
All institutions participating in the financial aid programs outlined in Chapter 22 shall follow the guidelines for the timely distribution of funds, as outlined in this section:
(1) Timely Disbursement. Institutions shall disburse state student financial aid funding to a student recipient's account or, in the case of work-study, through a paycheck, no later than three business days after receiving the funds. Undisbursed funds must be returned to the Board no later than six business days after the receipt of funds. Gift aid and work-study funds for which a student is no longer eligible may be disbursed to a different eligible student for whom funds have not yet been requested to meet the timely disbursement requirement.

Historically, funding for the state grant and loan programs has been disbursed to institutions on an as-needed basis, with expectations that it be disbursed to students in a timely manner and returned to the agency in a timely manner, if required. These expectations are outlined in Rule 22.2. The work-study program has operated under a different approach, with the agency disbursing the institution's entire allocation as a lump sum at the start of the fiscal year. Greater flexibility for institutional planning of work-study funding is being proposed for negotiated rulemaking, and the agency is implementing improvements to the technology supporting the financial aid disbursement request process. With these changes, it is also proposed that the work-study program align with the expectations made of other state and federal aid programs, which disburse funding to institutions on an as-needed basis and with the expectation of timely disbursement, to ensure the agency takes a fiscally prudent approach to these appropriations.

No comments were received regarding the adoption of these amendments.

Committee Comments:

- No comments

Proposed 2023 FAAC Meeting Dates

Meeting Date	Meeting Location
March 2, 2023	Virtual
June 1, 2023	In-person; THECB*
September 7, 2023	In-person; THECB*
December 7, 2023	Virtual

*This is dependent on the committee approval of location.

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