

**COMMITTEE ON
INNOVATION, DATA, AND
EDUCATIONAL ANALYTICS**

A G E N D A

9:00 A.M., Wednesday, January 25, 2023

Live broadcast available at: highered.texas.gov

**Teacher Retirement System of Texas
1000 Red River Street
5th Floor Boardroom
Austin, TX**

(Boardroom is located in the East building)

This meeting is conducted in person or via video conference, pursuant to Texas Government Code, Section 551.127. A quorum of the Board may be present in the Board Room, which is open to the public.

Chair: S. Javaid Anwar

Vice Chair: Welcome W. Wilson, Jr.

Members: Richard L. Clemmer; Robert P. Gauntt; Fred Farias III, O.D.; R. Sam Torn; Daniel O. Wong

Student Representative: Georgia Hejny (Ex-Officio)

COMMITTEE ON INNOVATION, DATA, AND EDUCATIONAL ANALYTICS

A G E N D A

Public Testimony: *The chair shall designate whether public testimony will be taken at the beginning of the meeting, at the time the related item is taken up by the board of the Texas Higher Education Coordinating Board (Board) after staff has presented the item, or any other time as determined by the chair. For procedures on testifying, please go to higher.ed.texas.gov/public-testimony.*

- I. Welcome and committee chair's meeting overview
- II. Consideration and possible action to approve the minutes from the October 26, 2022, meeting of the Committee on Innovation, Data, and Educational Analytics
- III. Public testimony on agenda items relating to the Committee on Innovation, Data, and Educational Analytics
- IV. Consideration and possible action to approve the consent calendar
- V. Matters relating to the Committee on Innovation, Data, and Educational Analytics
 - A. *Building a Talent Strong Texas* Data Insight: Student Outcomes and Financial Aid
 - B. Update on Data Modernization Initiative
 - C. Consideration and possible action to delegate to the commissioner authority to approve the data report required by Texas Education Code, Section 51.4033 and Section 51.4034, related to nontransferable credit and transfer courses
 - D. Report on Financial Aid Advisory Committee activities
- VI. Adjournment

Executive Session: *The Texas Higher Education Coordinating Board Committee on Innovation, Data, and Educational Analytics may convene in Executive Session at any point in this meeting, concerning any item listed in the agenda or to seek or to receive its attorney's advice on legal matters related thereto, pursuant to Texas Government Code, Section 551.071.*

Note: *Because the Board members who attend the committee meeting may create a quorum of the full Board, the meeting of the Committee on Innovation, Data, and Educational Analytics is also being*

posted as a meeting of the full Board. Only assigned committee members act upon any item before the Committee on Innovation, Data, and Educational Analytics at this meeting.

Weapons Prohibited: Pursuant to Texas Penal Code, Section 46.03(a)(14), a person commits an offense if the person intentionally, knowingly, or recklessly possesses or goes with a firearm, location-restricted knife, club, or prohibited weapon listed in Texas Penal Code, Section 46.05 in the room or rooms where a meeting of a governmental entity is held, if the meeting is an open meeting subject to Texas Government Code, Chapter 551, and if the entity provided notice as required by that chapter.

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM I

Welcome and committee chair's meeting overview

Mr. S. Javaid Anwar, chair of the Committee on Innovation, Data, and Educational Analytics, will provide the committee an overview of the items on the agenda.

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM II

Consideration and possible action to approve the minutes from the October 26, 2022, meeting of the Committee on Innovation, Data, and Educational Analytics

RECOMMENDATION: Approval

TEXAS HIGHER EDUCATION COORDINATING BOARD

MINUTES

Committee on Innovation, Data, and Educational Analytics

Via Live Broadcast

October 26, 2022, 9:00 a.m.

DRAFT Minutes

The Texas Higher Education Coordinating Board Committee on Innovation, Data, and Educational Analytics convened via Zoom at 9 a.m. on October 26, 2022, with the following members, present: S. Javaid Anwar, Chair; Fred Farias, III, O.D.; R. Sam Torn; Daniel P. Wong; and Georgia Hejny, Student Representative, Ex-Officio. Welcome W. Wilson, Jr., Vice Chair, Richard L. Clemmer joined via Zoom.

Other Board members present: Donna N. Williams and Emma Schwartz

The meeting is available at the following link: <http://www.thecb.state.tx.us/apps/Events/>.

| AGENDA ITEM | ACTION |
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| | Chairman Farias made opening remarks before handing the gavel to Mr. Anwar to officially open the meeting. |
| I. Welcome and committee chair's meeting overview | Mr. S. Javaid Anwar, chair, called the meeting of the Committee on Innovation, Data, and Educational Analytics to order at 9 a.m. and announced the meeting was being held via live broadcast. Mr. Anwar established that a quorum was met. |
| II. Consideration of approval of the minutes from the July 27, 2022, meeting of the Committee on Innovation, Data, and Educational Analytics | On motion by Mr. Sam Torn, seconded by Dr. Daniel Wong, the committee approved this item with all members voting in favor. |
| III. Public testimony on agenda items relating to the Committee on Innovation, Data, and Educational Analytics | Mr. Anwar stated there was no public testimony. |
| IV. Consideration of approval of the consent calendar | Mr. Anwar stated items on the consent calendar would have two votes: one on the non-rule items, and one on the rule item. No items were added or removed. On motion by Mr. Welcome Wilson, seconded by Mr. Sam Torn, the committee approved the non-rule agenda items V-C, V-E, and V-F, with all members voting in favor. |

| AGENDA ITEM | ACTION |
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| | <p>On motion by Dr. Fred Farias, seconded by Mr. Sam Torn, the committee approved the rule agenda items V-G (1) and V-G (2), with all members voting in favor.</p> |
| <p>V. Matters relating to the Committee on Innovation, Data, and Educational Analytics</p> <p>A. <i>Building a Talent Strong Texas</i> Data Insight: Preliminary headcount for fall 2022</p> <p>B. Update on Data Modernization Initiative</p> <p>C. Consideration and possible action to approve the report to the Legislature on high school individual graduation committee (IGC) graduates (Texas Education Code, Section 28.02591)</p> <p>D. Consideration and possible action to adopt the recommendation relating to the certification of gifts that are fundable through the Texas Research Incentive Program (TRIP) for emerging research universities</p> <p>E. Consideration and possible action to adopt the recommendation relating to the Facilities Audit Report</p> <p>F. Consideration and possible action to approve the “Report on Student Financial Aid in Texas Higher Education, Fiscal Year 2021” (General Appropriations Act, Senate Bill 1, Article III, Section 24, 87th Texas Legislature)</p> | <p>Mr. Robert Gauntt joined the meeting at 9:08 a.m. Ms. Emma Schwartz joined the meeting at 9:15 a.m.</p> <p>Dr. Kara Larkan-Skinner, Assistant Commissioner for Data Management and Research, provided a presentation and was available to answer questions.</p> <p>This item was for information only.</p> <p>Ms. Lori Fey, Deputy Commissioner for Data Analytics and Innovation, provided a presentation and was available for questions.</p> <p>This item was for information only.</p> <p>This item was approved on the consent calendar.</p> <p>Ms. Emily Cormier, Assistant Commissioner for Funding, provided a presentation and was available for questions.</p> <p>On motion by Dr. Daniel Wong, seconded by Mr. Welcome Wilson, the committee adopted the recommendation relating to the certification of gifts that are fundable through the Texas Research Incentive Program (TRIP) for emerging research universities with all members voting in favor.</p> <p>This item was approved on the consent calendar.</p> <p>This item was approved on the consent calendar.</p> |

| AGENDA ITEM | ACTION |
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| <p>G. Proposed Rules</p> <p>(1) Consideration and possible action to adopt proposed amendments to Board Rules, Texas Administrative Code (TAC), Chapter 22, Subchapter A, Section 22.2, concerning the General Provisions for Student Financial Aid Programs</p> <p>(2) Consideration and possible action to adopt proposed amendments to Board Rules, TAC, Chapter 23, Subchapter D, Sections 23.94, 23.95, 23.96, and 23.98, concerning the Loan Repayment Program for Mental Health Professionals</p> <p>(3) Consideration and possible action to adopt proposed amendments to Board Rules, 22.128-22.135, concerning the Texas College Work-Study Program</p> | <p>This item was approved on the consent calendar.</p> <p>This item was approved on the consent calendar.</p> <p>Dr. Charles W. Contéro-Puls, Assistant Commissioner, presented this item and was available for questions.</p> <p>On motion by Dr. Fred Farias, seconded by Mr. Robert Gauntt, the committee approved this Item with all members voting in favor.</p> |
| <p>VII Adjournment</p> | <p>On motion by Mr. Sam Torn, seconded by Mr. Robert Gauntt, this item was approved. Meeting adjourned at 9:50 a.m.</p> |

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM III

Public testimony on agenda items relating to the Committee on Innovation, Data, and Educational Analytics

RECOMMENDATION: No action required

Background Information:

The presiding chair shall designate whether public testimony will be taken at the beginning of the meeting, at the time the related item is taken up by the Board after staff has presented the item, or at any other time as determined by the presiding chair.

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM IV

Consideration and possible action to approve the consent calendar

RECOMMENDATION: Approval

Background Information:

To save institutions time and travel costs to attend the Committee on Innovation, Data, and Educational Analytics meetings in Austin, the committee has a consent calendar for items that are noncontroversial. Any item can be removed from the consent calendar by a committee member.

Consent Calendar

V. Matters relating to the Committee on Innovation, Data, and Educational Analytics

- C. Consideration and possible action to delegate to the commissioner authority to approve the data report required by Texas Education Code, Section 51.4033 and Section 51.4034, related to nontransferable credit and transfer courses

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM V-A

Building a Talent Strong Texas Data Insight: Financial Aid Data

RECOMMENDATION: No action required

Background Information:

Financial aid is federal and state money to help pay for postsecondary education. Grants, loans, scholarships, and work-study help make college affordable. Sixty-eight percent of students enrolled at public and private or independent nonprofit institutions in the 2020-2021 academic year received some form of financial aid. Nearly \$12.4 billion in student financial aid was disbursed from federal, institutional, private, and state funding sources in fiscal year 2021. While there are many students benefiting from those programs, there remains unmet financial need.

Understanding how financial aid data are related to *Building a Talent Strong Texas* is critical to the success of the plan. This is particularly important for the Manageable Debt target that is part of the Credentials of Value goal. This presentation will focus on the financial aid landscape in Texas, which includes multiple funding sources and types of student financial aid programs.

Dr. Kara Larkan-Skinner, Assistant Commissioner for Data Management and Research, will provide a brief presentation and be available to answer questions.

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM V-A

Building a Talent Strong Texas Data Insight: Financial Aid Data

RECOMMENDATION: No action required

Background Information:

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Dr. Kara Larkan-Skinner, Assistant Commissioner for Data Management and Research, will provide a brief presentation and be available to answer questions.

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM V-B

Update on Data Modernization Initiative

RECOMMENDATION: No action required

Background Information:

At the October 2022 board meeting, Texas Higher Education Coordinating Board (THECB) staff reviewed the status of the Data Modernization Initiative, an effort to implement a modern data infrastructure for the agency to deliver improved insight and actionable data for THECB stakeholders.

The Data Modernization Initiative includes multiple project work streams and is supported by both Governor's Emergency Education Relief funds and philanthropic funds in partnership with the Texas Higher Education Foundation. Implementation of this effort is well underway across several related types of work, including:

- technical and data architecture and implementation;
- user-facing deliverables design;
- data governance, both internal to THECB and with Tri-Agency partner agencies, Texas Education Agency and Texas Workforce Commission; and
- website organization and upgrades.

Ms. Lori Fey, Deputy Commissioner for Data Analytics and Innovation, will provide a brief presentation and be available to answer questions.

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM V-C

Consideration and possible action to delegate to the commissioner authority to approve the data report required by Texas Education Code, Section 51.4033 and Section 51.4034, related to nontransferable credit and transfer courses

RECOMMENDATION: Approval

Background Information:

Texas Education Code, Sections 51.4033 and 51.4034, require the Texas Higher Education Coordinating Board (THECB) to provide the Legislature with two transfer-related data reports by March 1 of each year, beginning in 2021. Institutions are required to report the necessary data to the THECB to facilitate the preparation of these reports. The report requirements were part of several outlined in Senate Bill (SB) 25, passed in the 86th Legislative Session, relating to measures to facilitate the transfer, academic progress, and timely graduation of students in public higher education. Because the reports both relate to transfer, the information will be combined into one report for the Legislature.

This report describes: (1) courses in the Lower-Division Academic Course Guide Manual that are not granted credit at a receiving general academic teaching institution and (2) the number of courses taken by students at public two-year colleges (referred to as “junior colleges” in statute) who either transferred to general academic teaching institutions or earned associate degrees at the two-year colleges.

The SB 25 “Report on Non-Transferable Credit and Courses Taken at Public Two-Year Colleges” provides an initial snapshot of the transfer landscape in Texas from the perspective of courses attempted, completed, and transferred by students who took courses at two-year public institutions, either while in high school as dual credit or after high school. Unlike transfer data tracked in the past, this data dives more deeply into student course selection and its relationship to transfer and, ultimately, timely and efficient graduation results.

Dr. Christina Zavala, Director of Student Success and Research, Data Management and Research, will be available for questions.

Committee on Innovation, Data, and Educational Analytics

AGENDA ITEM V-D

Report on Financial Aid Advisory Committee activities

RECOMMENDATION: No action required

Background Information:

Texas Higher Education Coordinating Board (THECB) rules require advisory committees to report on committee activities on an annual basis. This allows the board of the THECB to properly evaluate the committee's work, usefulness, and the costs related to the committee's existence. The current report covers the period from December 2021 through September 2022.

The Financial Aid Advisory Committee (FAAC) is authorized under Texas Education Code, Section 61.0776, and Texas Government Code, Section 2110.0012. FAAC provides the board of the THECB with advice and recommendations regarding the development, implementation, and evaluation of state financial aid programs for college students. The FAAC 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.

Ms. Rachelè Garrett, chair, and Ms. Denise Welch, past chair, of the FAAC will present a summary of the FAAC's recent activities and will be available to answer questions.

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 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 University | Nov. 2020-June 2023 |
| Dede Gonzales | Member, Texas State University | Nov. 2020-June 2023 |
| Bridgette Ingram | Member, Texas A&M University | Nov. 2020-June 2023 |
| Cecelia Jones | Member, Jarvis Christian University | Nov. 2021-June 2023 |
| Jace Kugiya | Student Member, UT-Austin | June 2021-May 2022 |
| Robert Merino | TASFSA 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 University | 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 Commerce | Nov. 2021- June 2024 |

Committee Meeting Dates: All meetings were held virtually

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

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 Brennan, THECB
- *Building a Talent Strong Texas*-Melissa Henderson, THECB
- When Your “Business” Impacts Your “Business”-Lou Murray, Earnest

One 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’s start term with the state fiscal year (Sept. 1) and the ability to elect a new vice chair 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:

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 noninclusive list of activities included the following:

- Worked with financial aid and high school representatives on recommended changes for the paper and online TASFA structure
- Engaged 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 informed decisions related to financial aid concerns and challenges in higher education.
- It provides a platform to identify key services and ways to successfully administer programs supporting Texas residents pursuing higher education.
- It 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*.
- It 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 <u>Virtual</u> Meeting Connection | Committee Members Absent |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Jackie Adler Ben Bholan Victoria Chen Rachele Garrett Bridgette Ingram Cecelia Jones Ed Kerestly Melet Leafgrean Robert Merino Holly Nolan Shonna Norton | Steven Peterson Joseph Ruiz Arnold Trejo Tevian Sides Thomas Ratliff Joy Thomas DeDe Gonzales Jase Kugiya Sal Ramirez Gilbert Zavala |
| Agenda Item 1. Welcome, Introductions and Overview of Meeting | Denise Welch, Chair |
| Handout Provided: Yes | Formal Decision/Action Required N/A |
| Presentation Summary: <ul style="list-style-type: none"> • Introduction of all new committee members by Denise Welch • Introduction of all current committee members **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 |
| Handout Provided: Yes | Formal Decision/Action Required Minutes approved |
| Presentation Summary: <ul style="list-style-type: none"> • No corrections were identified. **See handout for agenda item 2 for more information. | |

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| Agenda Item 3. Update: Prior FAAC Business | DeChá Reid Senior Director |
| Handout Provided: No | Formal Decision/Action Required N/A |
| Update Summary: | |
| <ul style="list-style-type: none"> No Prior Business | |
| Agenda Item 4. Discussion: Financial Aid Strategy | Charles Conterò-Puls, Assistant Commissioner |
| Handout Provided: Yes | Formal Decision/Action Required N/A |
| Update Summary: | |
| <ul style="list-style-type: none"> Transfer Grant will not be funded at the community college; this is a vertical transfer to a 4-year university (individuals transferring from a 2-year to 4-yr) <ul style="list-style-type: none"> Funds about 1600 students Student is in a 2-yr currently and will transfer to a 4-yr in a university next academic year. Final stages of the contract with a 3rd party who will select participants for the program. | |
| Agenda Item 5. Update: External Relations | John Wyatt, Senior Director, THECB-External Relations |
| Handout Provided: No | Formal Decision/Action Required N/A |
| Update Summary: | |
| <ul style="list-style-type: none"> There were no updates from John Wyatt Denise Welch provided a brief description about External Relations for our new committee members. <ul style="list-style-type: none"> External Relations is a liaison for the agency to work with the Governor, Legislatures and other stakeholders (e.g., colleges, universities) to provide data and information on higher education. Committee members requested feedback concerning the Federal and State difference in Selective Service | |
| Agenda Item 6. Update: House Bill 3 (FAFSA/TASFA Graduation Requirement); House Bill 2140 (on-line TASFAA); and TASFAA Subcommittee | Claudette Jenks, Director, College Readiness and Success |
| Handout Provided: No | Formal Decision/Action Required N/A |
| Update Summary: | |
| <ul style="list-style-type: none"> Online TASFA has been created to allow students to save and complete First launch will be on Oct. 1 (available in English) Share a Spanish version in phase II Working with General Counsel to determine an electronic signature process Working on a marketing strategy and ApplyTX staff to provide a link in the Counselor Suite Working to provide data in the Counselor Suite so Counselors can see the completion of TASFA TX OnCourse has provided tool kits for the new graduation requirement to complete a TASFA and FAFSA Will meet with the TASFA workgroup on the file layout. Create and share a file layout by early next year in 2022 (goal is in January); been in consultation with vendors on the file layout. Rules are being established and will be published in January. Adopted by the Board in late April | |
| Agenda Item 7. Data Collection Subcommittee | Dede Gonzales, Subcommittee Chair |
| Handout Provided: Yes | Formal Decision/Action Required N/A |
| Update Summary: | |
| <ul style="list-style-type: none"> <ul style="list-style-type: none"> **See handout for agenda item 7 for more information. | |
| Agenda Item 8. Update: Legislative Committee | Arnold Trejo, Subcommittee Chair |
| Handout Provided: No | Formal Decision/Action Required N/A |
| Update Summary: | |
| <ul style="list-style-type: none"> The Chair of the FAAC Legislative Subcommittee is a part of the TASFAA Legislative Subcommittee is a part of the TASFAA Legislative as a committee member/FAAC representative. <ul style="list-style-type: none"> FAAC will collaborate with TASFAA on Legislative issues Meet with Karen on the new partnership with TASFAA Legislative Committee | |

- Need to identify common themes
 - TASFAA is creating the Legislative Committee (Karen Krause, Christ Murr, and Arnold); still forming the committee based on volunteers

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| <p>Agenda Item 9. Update: TASFAA Recommendations and Feedback</p> | <p>Robert Merino, TASFAA</p> |
| <p>Handout Provided:</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Update Summary:</p> <ul style="list-style-type: none"> • Very successful conference with 250 attendees for the Oct. 2021 • Carolyn Jones was inducted into the Hall of Fame • Raised over \$3k for the Boys and Girls Club • Started 2022 year on Nov. 1 • Corpus Christi will be the host city for the Oct. 2022 • Volunteer form is still active to volunteer for the TASFAA Committees until next week. • Are making some selections with those that have volunteers. | |
| <p>Agenda Item 10. Update: School District Feedback</p> | <p>Ben Bholan, Arlington ISD; Shonna Norton, Wichita Falls ISD</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Update Summary:</p> <ul style="list-style-type: none"> • Talking with District and noticing the difference with having students in-person • Aggressive efforts with the Seniors to make sure that they graduate timely. • Having students in-person has yielded better results with completion of FAFSA and applying for college. • 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. | |
| <p>Agenda Item 11. Update: Office of Student Financial Aid Programs (SFAP)</p> | <p>DeChà Reid, Senior Director</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Update Summary:</p> <ul style="list-style-type: none"> • GEER Return of Funds Form Updated – Financial Aid Services (FAS) recently updated the Governor’s Emergency Education Relief (GEER) Return of Funds Form to expand the options available to institutions to refund unused aid and any interest accrued. The two new PCA options on the form include the Reskilling Support Fund and the Open Education Resources which were added to help streamline additional GEER programs that have funding being returned by institutions. Also, the form was updated to include a direct link to the Electronic Funds Transfer Instructions which allows schools to access the details related to returning funds back to the Texas Higher Education Coordinating Board via wire transfer, Automated Clearing House (ACH), paper check or through the Uniform Statewide Accounting System (USAS). • Electronic Funds Transfer (EFT) Instructions Updated – The EFT instructions were updated this year to provide information on the Recurring Transfer index (RTI) process which is used by public universities to return certain types of state aid through the Uniformed State Accounting System (USAS). FAS worked closely with the agency’s Finance team to ensure that the updated EFT instructions provided clear guidance on the RTI refund process and included a recent memo that clarified the set-up process through USAS. • News Across SFAP, we are hiring staff for all positions. We currently have a vacant position for XXXXX • Institutional Calendar – Changes to the institutional calendar for fall 2021. There will be a new spring 2022 institutional calendar published soon. • HB133-Changes to Statute – A change to the statute relating to education benefits at public institutions of higher education for certain survivors of public servants <ul style="list-style-type: none"> ○ During the Special Session HB 133 Changes to the Texas Education Code 54.354 (a) – Benefits of Survivors ○ Changes within the statute now allows the surviving child to be up to 25 years at the age at the time of the parent’s death instead of 18 ○ Does not begin until the cost charged for spring 2022 ○ Not retroactive ○ A formal communication will be sent out to schools soon • Upcoming deadlines: FAD Cycle 3 deadline is Dec. 17th. <ul style="list-style-type: none"> ○ There are 88 schools that still need to certify and 8 schools that need to submit a FAD file. Files need to be submitted soon. | |

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| <p>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</p> | <p>DeChà Reid, Senior Director</p> |
| <p>Handout Provided: Yes</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Discussion Summary:</p> <ul style="list-style-type: none"> • Overview of the Proposed Amendments to TAC, Title, Title 19, Part 1, Chapter 22, Subchapter A, Sections 22.1, 22.3, 22.6 and 22.11 <p>**See handout for agenda item 12 for more information.</p> | |
| <p>Agenda Item 13. Discussion: Election of Vice Chair</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required Yes/Motion Passed</p> |
| <p>Update Summary:</p> <ul style="list-style-type: none"> • Motion made by Ed Kerestly to elect Rachele Garrett for Vice Chair • Nomination accepted from Rachele Garrett • Arnold Trejo seconds the motion • Motion passed unanimously | |
| <p>Agenda Item 14. Discussion: Selection of TASFA Subcommittee Chair</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required Yes/Motion Passed</p> |
| <p>Presentation Summary:</p> <ul style="list-style-type: none"> • Motion made by Arnold Trejo to elect Bridgette Ingram • Nomination accepted from Bridgette Ingram • Motion passes unanimously | |
| <p>Agenda Item 15. Discussion: 2022 FAAC Meeting Dates</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Presentation Summary:</p> <ul style="list-style-type: none"> • Proposed meeting dates <ul style="list-style-type: none"> • March 3, 2022 • June 2, 2022 • September 8, 2022 • December 8, 2022 • Dates agreed upon by the FAAC • Meetings for the 2022 year will remain virtual. | |
| <p>Agenda Item 16. Discussion: Feedback on the Depart of Education Federal Student Aid Conference</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <ul style="list-style-type: none"> • There was feedback from the committee members concerning the online conference. They were disappointed with online version of the conference; it was difficult to get all of the information out of the conference. • There was feedback from the committee members stating their concerns that there was no verification for 2023-2024 • Pre-recording was not the same as a live presentation online; these were webinars • Hard to engage when there are distractions • Content was superior for this year • FAFSA Simplification and all the changes especially with other agencies (e.g.); challenge with explaining the Student Aid Index (SAI). • Would like immediate access of information instead of waiting for months to get information from the conference | |
| <p>Agenda Item 17. Discussion: Topics for Future Meetings</p> | <p>Denise Welch, Chair</p> |

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| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Presentation Summary:</p> <ul style="list-style-type: none"> • Better understanding on how effective state financial aid programs from year-to-year retention and completion <ul style="list-style-type: none"> ◦ State Assistance vs. Outcome (data-financial Aid Report) • Compare data from students with financial assistance vs. no assistance (data) • Committee members would like an external speaker on the demographic trends of the state and the requirement of graduation <ul style="list-style-type: none"> ◦ Data – external research-broad strategic presentation on how the state is moving concerning Policy • Discussion on lessons from the post-Covid world after the funds end from the government <ul style="list-style-type: none"> ◦ Was there any evidence that additional resources made a difference with a student staying enrolled • Future updates on the Strategic Financial Aid Priority • Student Aid Index | |
| <p>Agenda Item 18. Adjournment</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <ul style="list-style-type: none"> • Adjournment at 11:49 a.m. | |

March 3, 2022, FAAC Meeting Minutes

| Committee Members in Attendance Via <u>Virtual</u> Meeting Connection | Committee Members Absent |
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| 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Dr. Shannon Crossland presented on the Certified Financial Aid Administrator Program and provided information on the following: <ul style="list-style-type: none"> ○ 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: <ul style="list-style-type: none"> • Dr. Sheri Ranis presented on the Reskilling and Upskilling Program and provided information on the following: <ul style="list-style-type: none"> ○ Texas Reskilling Support Fund Grant Program ○ Reskilling Funding Focus ○ Reskilling Program Highlights ○ Eligible Credential Programs ○ Student Eligibility ○ Student Awards | |

- Reskilling Additional Features

**See handout for agenda item 5 for more information

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| Agenda Item 6. Update: External Relations | John Wyatt, THECB-External Relations |
| Handout Provided: No | Formal Decision/Action Required N/A |
| Update Summary: <ul style="list-style-type: none"> • John Wyatt provided information on the following: <ul style="list-style-type: none"> ○ 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: <ul style="list-style-type: none"> • Dr. Charles Conterò-Pulse presented the THECB Financial Aid Strategic Priority and provided information on the following: <ul style="list-style-type: none"> ○ THECB Strategic Architecture ○ Randomized Controlled Trial ○ Technological Infrastructure <p>**See handout for agenda item 7 for more information.</p> | |
| 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: <ul style="list-style-type: none"> • Bridgette Ingram, Leah Smalley and Claudette Jenks presented the Online TASFA and provided information on the following: <ul style="list-style-type: none"> ○ 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 <p>**See handout for agenda item 8 for more information</p> | |
| Agenda Item 9. Update: Data Collection Subcommittee | Dede Gonzales, Subcommittee Chair |
| Handout Provided: Yes | Formal Decision/Action Required N/A |
| Update Summary: <ul style="list-style-type: none"> • Dede Gonzales provided information on the following: <ul style="list-style-type: none"> ○ Update on Online TASFA ○ FAD Data Modernization ○ Update on Office of Student Financial Aid Programs ○ Recent Memos ○ Upcoming Memos ○ Upcoming Deadlines: <ul style="list-style-type: none"> ○ Authority to Transfer Process ○ FAD Certification Process ○ FAS Webcast <p>**See handout for agenda item 8 for more information</p> | |
| Agenda Item 10. Update: Legislative Subcommittee | Arnold Trejo, Subcommittee Chair |
| 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.

 - 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.

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| 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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? <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Feedback concerning the NASFAA article: <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • NASFAA for the SAI-Bridgette Ingram <ul style="list-style-type: none"> ○ What is the agency doing with SAI? | |
| Agenda Item 18. Adjournment | Denise Welch, Chair |
| Handout Provided: No | Formal Decision/Action Required N/A |
| <ul style="list-style-type: none"> • Adjournment at 12:46 p.m. | |

June 2, 2022, FAAC Meeting Minutes

| Committee Members in Attendance Via <u>Virtual</u> Meeting Connection | Committee Members Absent |
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| 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 |
| 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • College Student Budgets: There was a potential delay in tuition and fees from schools. <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Melissa Henderson presented on Building a Talent Strong Texas and provided information on the following: <ul style="list-style-type: none"> ○ 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: <ul style="list-style-type: none"> • Laura Brenna presented on Texas OnCourse Academy and provided information on the following: <ul style="list-style-type: none"> ○ Texas OnCourse Background ○ Statewide Collaboration ○ Core Offerings ○ Academy Dashboard | |

- o Academy Modules
- o Digital Learning
- o Map My Path
- o My Texas Future

**See handout for agenda item 5 for more information

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| <p>Agenda Item 6. Presentation: Texas Leadership Scholars Program</p> | <p>Matt Parson, Assistant Commissioner, Workforce Innovation</p> |
| <p>Handout Provided: Yes</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Presentation Summary:</p> <ul style="list-style-type: none"> • Matt Parson presented on the Texas Leadership Scholars Program and provided information on the following: <ul style="list-style-type: none"> o Goals o Eligibility – Students o The Student Experience o Financial Commitment o Institutional Partners o Student Application Process <p>**See handout for agenda item 5 for more information</p> | |
| <p>Agenda Item 7. Update: External Relations</p> | <p>John Wyatt, External Relations</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Update Summary:</p> <ul style="list-style-type: none"> • Interim Activities of the Legislation Session <ul style="list-style-type: none"> o House and Senate committees were provided with the interim charges. o Commissioner Keller testified on several occasions for Higher Education. o Commissioner Keller was jointed by other commissioners within the tri-agency on the partnership. o Hearings will slow down during the summer and pick up late-summer and fall o Agency focus is the LAR (Legislative Appropriation Request) for the next biennium (2024-25). o Working on ways to continue to support higher education by providing the data and analysis to Legislators. <ul style="list-style-type: none"> • Selective Service with matching the federal requirements • FAFSA/TASFA changes • Student Aid Index | |
| <p>Agenda Item 8. Update: THECB Financial Aid Strategic Priority</p> | <p>Charles Conterò-Puls, Assistant Commissioner</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Update Summary:</p> <ul style="list-style-type: none"> • Agency Strategic Architecture <ul style="list-style-type: none"> o Continue to work on the architecture o Outreach to the Financial Aid Community on what strengthens the financial aid ecosystem. Survey to follow in June. • Texas Transfer Grant Pilot Program <ul style="list-style-type: none"> o Participating public universities and HRI’s will receive recipient rosters o Student are listed on the 2022-23 FAFSA • Continued work on Technology Infrastructure <ul style="list-style-type: none"> o 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. o Will onboard two repayment programs in September as well as other programs later in the year. The next program will be TCWS. o The long-term goal is to bring all the state financial aid programs o 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. | |
| <p>Agenda Item 9. Joint Update: TASFA Subcommittee: House Bill 3 (FAFSA/TASFA Graduation Requirement) and House Bill (On-Line TASFA)</p> | <p>Bridgette Ingram, Subcommittee Chair; Claudette Jenks, Director, College Readiness; and Leah Smalley, Assistant Director, THECB</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |

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| Update Summary: | |
| <ul style="list-style-type: none"> • Development for the online TASFA <ul style="list-style-type: none"> ○ 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: | |
| <ul style="list-style-type: none"> • 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: | |
| <ul style="list-style-type: none"> • 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: | |
| <ul style="list-style-type: none"> • FAFSA Graduation Requirement <ul style="list-style-type: none"> ○ 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: | |
| <ul style="list-style-type: none"> • Recent Announcement Announcements <ul style="list-style-type: none"> ○ 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 <ul style="list-style-type: none"> ○ 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 <ul style="list-style-type: none"> ○ 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 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.

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| <p>Agenda Item 15. Update: Recognition of members stepping down</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Discussion Summary:</p> <ul style="list-style-type: none"> • Six members were recognized for their work on the Financial Aid Advisory Committee. The June meeting was their last meeting. <ul style="list-style-type: none"> • Ed Kerestly • Joy Thomas • Ben Bholan • Jace Lugiya • Steven Peterson • Robert Merino | |
| <p>Agenda Item 16. Discussion Topic: Recommendation on Proposed Nominees for FAAC</p> | <p>DeChà Reid, Senior Director, THECB</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Discussion Summary</p> <ul style="list-style-type: none"> • Recommended new Financial Aid Advisory Committee members for the July Board meeting <ul style="list-style-type: none"> ○ 2-Public Universities ○ 2-Private Universities ○ 1-HRI ○ 1-Community College ○ 1-ISD <ul style="list-style-type: none"> ▪ 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, Director of Financial Aid – Alvin Community College ▪ Lisa Schoenbrun, Coordinator, College Readiness – El Paso ISD ▪ Dede Gonzales, President-Elect, TASFAA Representative | |
| <p>Agenda Item 17. Discussion Topic: Addressing the unemployment compensation reported by students and parents</p> | <p>DeChà Reid, Senior Director, THECB</p> |
| <p>Handout Provided: No</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Discussion Summary</p> <ul style="list-style-type: none"> • 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 income for 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. <ul style="list-style-type: none"> ○ How are schools working with families on this issue? <ul style="list-style-type: none"> ▪ 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? <ul style="list-style-type: none"> ▪ There has not been much impact seen because it is difficult to identify unless the student is selected for verification. | |

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| <p>Agenda Item 18. Discussion Topic – Leveraging Financial Aid</p> | <p>Thomas Ratliff, Director of Financial Aid, Abilene Christian University</p> |
| <p>Handout Provided: Yes</p> | <p>Formal Decision/Action Required N/A</p> |
| <p>Discussion Summary</p> <ul style="list-style-type: none"> • Thomas Ratliff presented on Levering Financial Aid and provided information on the following: <ul style="list-style-type: none"> ○ 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 | |
| <p>Agenda Item 19. Discussion Topic – Ways to address roadblocks with recruiting and retaining students</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | |
| <p>Discussion Summary</p> <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> ○ 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 | |
| <p>Agenda Item 20. Transition of Leadership</p> | <p>Denise Welch, Chair</p> |
| <p>Handout Provided: No</p> | |
| <ul style="list-style-type: none"> • The Chair position for the FAAC transitioned from Denise Welch to Rachelè Garrett | |
| <p>Agenda Item 21. Feedback for Future Meetings</p> | <p>Rachelè Garrett, Chair</p> |
| <p>Handout Provided: No</p> | |
| <ul style="list-style-type: none"> • Research related to FAFSA completion • Graduation rates • HEEREF outcomes <ul style="list-style-type: none"> ○ Did it help with persistence and enrollment? • Student Aid Index and the impact it will have at the state level | |
| <p>Agenda Item 22. Adjournment</p> | <p>Rachelè Garrett, Chair</p> |
| <ul style="list-style-type: none"> • Adjourned at 12:43 p.m. | |

September 8, 2022, FAAC Minute Meetings

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| <p>Committee Members in Attendance Via <u>Virtual</u> Meeting Connection</p> | <p>Committee Members Absent</p> |
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| <p>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</p> | <p>Holly Nolan Shonna Norton Sal Ramirez Thomas Ratliff Joseph Ruiz Joseph Sanchez Lisa Schoenbrun Tevian Sides Gilbert Zavala</p> | <p>DeDe Gonzales Arnold Trejo</p> |
| <p>Agenda Item 1. Welcome, Introductions and Overview of Meeting</p> | | <p>Rachelè Garrett, Chair</p> |
| <p>Handout Provided: Yes</p> | | <p>Formal Decision/Action Required No</p> |
| <p>Summary: **See handout for agenda item 1 for more information</p> | | |
| <p>Agenda Item 2. Consideration of Approval of Minutes from the meeting held on June 2, 2022</p> | | <p>Rachelè Garrett, Chair</p> |
| <p>Handout Provided: Yes</p> | | <p>Formal Decision/Action Required Minutes approved</p> |
| <p>Summary: <ul style="list-style-type: none"> No corrections were identified. **See handout for agenda item 2 for more information.</p> | | |
| <p>Agenda Item 3. Presentation: When your "Business" impacts your "Business"</p> | | <p>Lou Murray, Southwest/Rocky Mountain Regional Lead for Earnest</p> |
| <p>Handout Provided: Yes</p> | | <p>Formal Decision/Action Required No</p> |
| <p>Update Summary: **See handout for agenda item 3 for more information.</p> | | |
| <p>Agenda Item 4. Update: Prior FAAC Business</p> | | <p>DeChá Reid, Senior Director, THECB</p> |
| <p>Handout Provided: No</p> | | <p>Formal Decision/Action Required No</p> |
| <p>Presentation Summary: <ul style="list-style-type: none"> None </p> | | |
| <p>Agenda Item 5. Update: External Relations</p> | | <p>John Wyatt, Senior Director, External Relations, THECB</p> |
| <p>Handout Provided: No</p> | | <p>Formal Decision/Action Required No</p> |
| <p>Update Summary: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Transfer Grants Texas Leadership Scholarship Program Texas Commission on Community College Finance <ul style="list-style-type: none"> 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. </p> | | |

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| 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Update on the online TASFA <ul style="list-style-type: none"> ○ 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: <ul style="list-style-type: none"> • 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) <ul style="list-style-type: none"> ○ 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 DeChà 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: <ul style="list-style-type: none"> ○ No update provided | |

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| 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: | |
| <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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: | |
| <ul style="list-style-type: none"> 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: | |
| <ul style="list-style-type: none"> 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 | |
| <ul style="list-style-type: none"> 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 | |
| <ul style="list-style-type: none"> 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 |

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| Handout Provided: No | Formal Decision/Action Required Yes |
| Discussion Summary <ul style="list-style-type: none">12:20pm; Denise motion to adjourn and Victoria Second | |