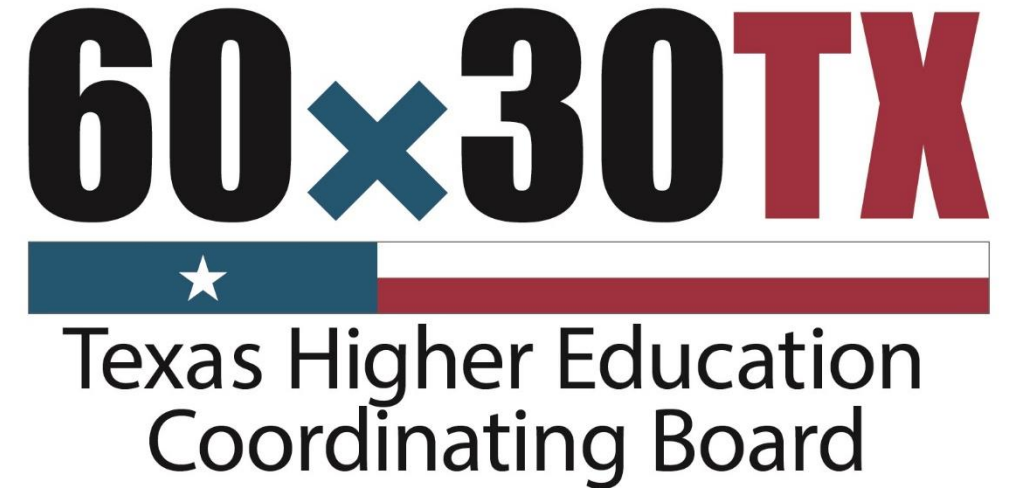
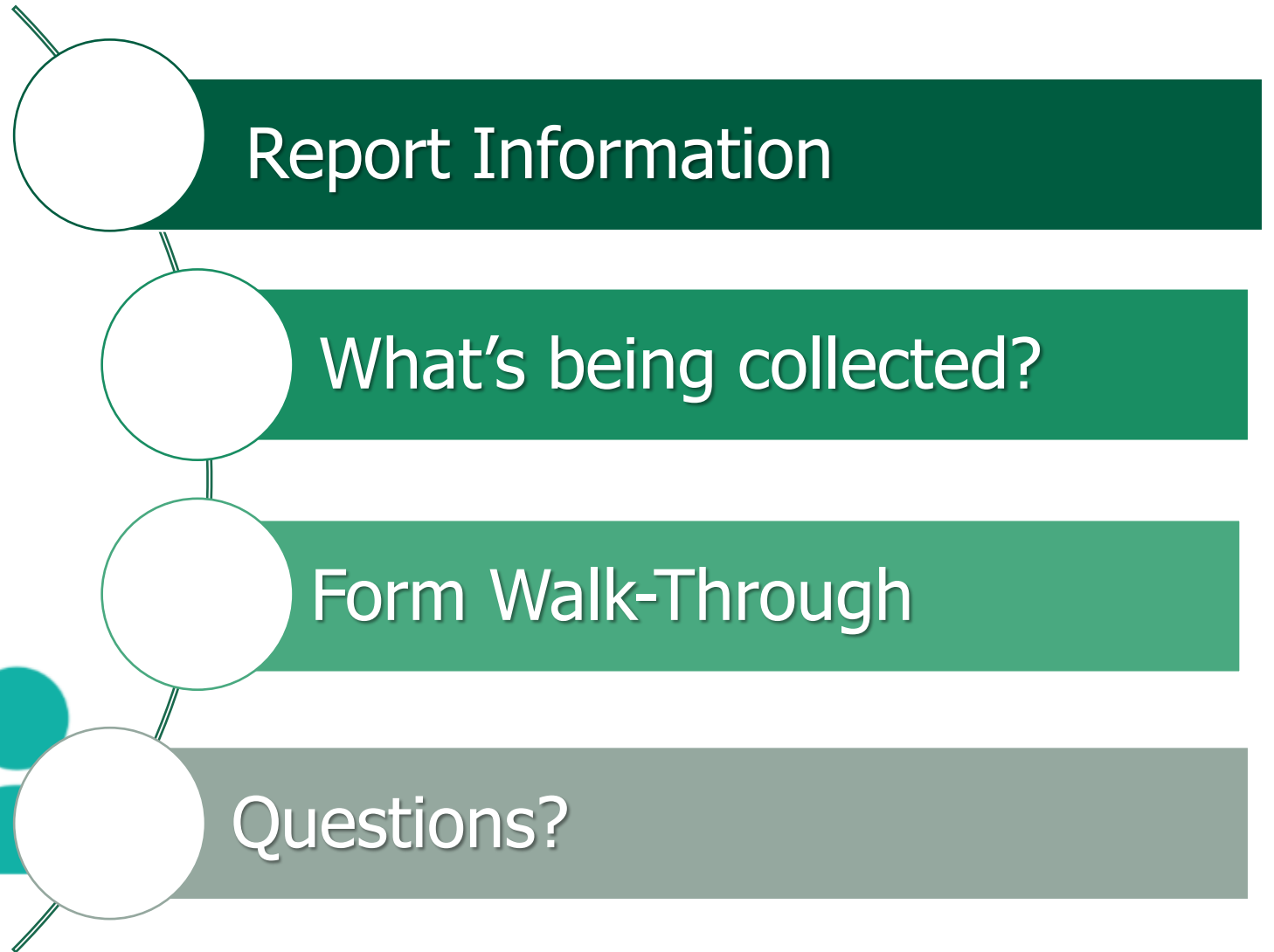


State Campus-Based Annual Report

Leah Smalley
Student Financial Aid Programs
October 13, 2020




Agenda



State Campus-Based Report

Report Information

- Memo sent **Oct. 1, 2020.**
- Form on the SFAP webpage → Program Resources.
- Complete fillable form and email e-signed copy to:
FASOperations@highered.texas.gov
- Public institutions must submit a copy of their most recent TPEG Guidelines, marked with an "As of date."
- Deadline to submit is **Oct. 30, 2020.**



**TEXAS HIGHER EDUCATION
COORDINATING BOARD**
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P.O. Box 12788 Austin, Texas 78711

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Strategic Finance Policy
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TO: Directors of Financial Aid
Texas Public and Private/Independent Institutions of Higher Education

FROM: DeChà Reid
Director, Financial Aid Services

DATE: Oct. 1, 2020

RE: State Campus-Based Annual Report - FY 2020 (2019-20)

The Texas Higher Education Coordinating Board (THECB) is required to collect data on state campus-based programs and retain from each public institution current guidelines for administering the Texas Public Educational Grant (TPEG) program.

Enclosed is the required form that participating private and all public institutions will use to report data for the FY 2020 (2019-20) academic year. The completed report, excess amount of funds (if applicable), and a current copy of each institution's TPEG guidelines (including an "As-Of" date) must be submitted to the THECB by email at FASOperations@highered.texas.gov.

The submission deadline is **Oct. 30, 2020.**

If you have questions, email Financial Aid Services through [CONTACT US](#) (select "Financial Aid Question" as the Contact Reason).

Enclosed: [State Campus-Based Programs Annual Report - FY 2020](#)

Participating License Plate Insignia (LPI) Private/Independent Institutions:

Austin College
Baylor University
Lubbock Christian University
Rice University
Southern Methodist University
Southwestern University
St. Mary's University
Texas Christian University
University of Mary Hardin-Baylor
University of St. Thomas

What's being collected?

Public and Private Institutions

- License Plate Insignia (LPI)

Public Institutions Only

- Student Deposit Scholarship (SDS)
- Texas Public Educational Grant (TPEG)
- Emergency Loans

60x30TX
Texas Higher Education Coordinating Board

2019-20 (FY 2020)
STATE CAMPUS-BASED PROGRAMS
Annual Report

The Texas Higher Education Coordinating Board (THECB) is required to monitor the License Plate Insignia (LPI) Scholarship, Student Deposit Scholarship (SDS), and Texas Public Educational Grant (TPEG) programs. In order to comply, all institutions that participate in these programs must complete this State Campus-Based Programs Annual Report for FY 2020. Institutions have until **Oct. 30, 2020**, to submit the form along with any excess funds identified. Institutions that participate in the TPEG program must include a copy of their FY 2020 TPEG guidelines with their submission. *Private/Independent institutions only need to certify SECTION ONE.*

Institution Contact Information		
Institution Name:		FICE Code:

SECTION ONE MUST BE COMPLETED BY PARTICIPATING PUBLIC AND PRIVATE/INDEPENDENT INSTITUTIONS

SECTION ONE: License Plate Insignia Scholarship Program, FY 2020 (9/1/2019 - 8/31/2020)
(Texas Transportation Code, Section 504.615)

Were funds from the sale of specialty license plates earned in FY 2020? ☐ YES ☐ NO
If NO, leave this section blank and go to SECTION TWO. If YES, complete the following:

A.	LPI carry-forward balance in FY 2020	\$ 0.00
B.	Total amount of investment income earned on program funds in FY 2020	\$ 0.00
C.	Total amount of LPI funds deposited in FY 2020	\$ 0.00
D.	Total amount of LPI funds awarded as scholarships in FY 2020	\$ 0.00
E.	Total amount of funds transferred from LPI to TPEG in FY 2020 (PUBLIC INSTITUTIONS ONLY)	\$ 0.00
F.	FY 2021 LPI carry-forward balance	\$ 0.00

If D is greater than zero, complete the following:

G.	Enter the total number of LPI scholarship recipients awarded in FY 2020	0
----	---	---

SECTIONS TWO AND THREE MUST BE COMPLETED BY PARTICIPATING PUBLIC INSTITUTIONS ONLY

SECTION TWO: Student Deposit Scholarship Program, FY 2020 (9/1/2019 - 8/31/2020)
(TEC Section 54.5021)

Were student deposit fees collected in FY 2020? ☐ YES ☐ NO
If NO, leave this section blank and go to SECTION THREE. If YES, complete the following:

A.	SDS carry-forward balance in FY 2020	\$ 0.00
B.	Total amount of investment income earned on program funds in FY 2020	\$ 0.00
C.	Total amount forfeited general deposits in FY 2020	\$ 0.00
D.	Total amount of SDS funds obligated and expended in FY 2020 Note: Obligated funds = encumbered by 8/31/2020 but paid after 9/1/2020 Expended funds = 9/1/2019 - 8/31/2020	\$ 0.00
E.	Total amount of funds transferred from SDS to TPEG in FY 2020	\$ 0.00
F.	FY 2021 SDS carry-forward balance	\$ 0.00
G.	150% of B + C	\$ 0.00
H.	*Excess amount = F - G	\$ 0.00

*If H is greater than zero, the excess amount must be sent to the THECB.

FY 2020 State Campus-Based Programs Annual Report

As of 10/01/2020

1

- **Public** institutions receive funding directly from the Texas Comptroller.
- **Private** institutions that received funding from the THECB:



Austin College
Baylor University
Lubbock Christian University
Rice University
Southern Methodist University
Southwestern University
St. Mary's University
Texas Christian University
University of Mary Hardin Baylor
University of St. Thomas

Texas Transportation Code: <https://statutes.capitol.texas.gov/Docs/TN/htm/TN.504.htm#504.615>

Student Deposit Scholarships (SDS)

Student Deposit Funds:

- Income from the investment
- Time deposits of the general deposits
- Forfeited general deposits



Texas Education Code: <https://statutes.capitol.texas.gov/Docs/ED/htm/ED.54.htm#54.5021>

Texas Public Educational Grant (TPEG)

TPEG Set-Aside Funds:

- Each public institution is **required** to put money aside for grant funding.
- No more than 10% can be used for emergency loans.
- Interest earned on these funds can be used only for grants, not loans.



Texas Education Code: <https://statutes.capitol.texas.gov/Docs/ED/htm/ED.56.htm#56.031>

Emergency Loans

Emergency Loans from Set-Asides:

- Each public institution can establish an emergency loan program. Students are loaned money to pay tuition, fees, and the costs of textbooks.
- Short-term loans typically must be repaid within 90 days.



Texas Education Code: <https://statutes.capitol.texas.gov/Docs/ED/htm/ED.56.htm#56.051>

Form Walk-Through

SECTION ONE MUST BE COMPLETED BY PARTICIPATING PUBLIC AND PRIVATE/INDEPENDENT INSTITUTIONS

SECTION ONE: License Plate Insignia Scholarship Program, FY 2020 (9/1/2019-8/31/2020)
(Texas Transportation Code, Section 504.615)

Were funds from the sale of specialty license plates earned in FY 2020? ☐ YES ☐ NO
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C.	Total amount of LPI funds deposited in FY 2020	\$ 0.00
D.	Total amount of LPI funds awarded as scholarships in FY 2020	\$ 0.00
E.	Total amount of funds transferred from LPI to TPEG in FY 2020 (PUBLIC INSTITUTIONS ONLY)	\$ 0.00
F.	FY 2021 LPI carry-forward balance	\$ 0.00

If D is greater than zero, complete the following:

G.	Enter the total number of LPI scholarship recipients awarded in FY 2020	0
----	---	---

SECTIONS TWO AND THREE MUST BE COMPLETED BY PARTICIPATING PUBLIC INSTITUTIONS ONLY

SECTION TWO: Student Deposit Scholarship Program, FY 2020 (9/1/2019 - 8/31/2020)
(TEC, Section 54.5021)

Were student deposit fees collected in FY 2020? ☐ YES ☐ NO
If NO, leave this section blank and go to SECTION THREE. If YES, complete the following:

A.	SDS carry-forward balance in FY 2020	\$ 0.00
B.	Total amount of investment income earned on program funds in FY 2020	\$ 0.00
C.	Total amount forfeited general deposits in FY 2020	\$ 0.00
D.	Total amount of SDS funds obligated and expended in FY 2020 Note: Obligated funds = encumbered by 8/31/2020 but paid after 9/1/2020 Expended funds = 9/1/2019 – 8/31/2020	\$ 0.00
E.	Total amount of funds transferred from SDS to TPEG in FY 2020	\$ 0.00
F.	FY 2021 SDS carry-forward balance	\$ 0.00
G.	150% of B + C	\$ 0.00
H.	*Excess amount = F - G	\$ 0.00

*If H is greater than zero, the excess amount must be sent to the THECB.

SECTION THREE: Texas Public Educational Grant Program (TPEG), FY 2020 (9/1/2019-8/31/2020)
(TEC, Section 56.031) Submit current copy of TPEG guidelines to FASOperations@highered.texas.gov

A.	TPEG carry-forward balance in FY 2020	\$ 0.00
B.	Total amount of investment income earned on program funds in FY 2020	\$ 0.00
C.	Total amount of TPEG set-aside deposits made in FY 2020	\$ 0.00
D.	Total amount of funds transferred from LPI to TPEG	\$ 0.00
E.	Total amount of funds transferred from SDS to TPEG	\$ 0.00
F.	Total amount of TPEG awards obligated and expended in FY 2020 Note: Obligated funds = encumbered by 8/31/2020 but paid after 9/1/2020 Expended funds = 9/1/2019 – 8/31/2020	\$ 0.00
G.	Total amount TPEG funds transferred for Emergency Loans	\$ 0.00
H.	FY 2021 TPEG carry-forward balance	\$ 0.00
I.	150% of C	\$ 0.00
J.	*Excess amount = H - I	\$ 0.00

*If J is greater than zero, the excess amount must be sent to the THECB.

Emergency Loan Program Funded through TPEG Set-Asides, (TEC, Section 56.051)

If G is greater than zero, complete the following:

K.	Total amount of Emergency Loans awarded in FY 2020	0
L.	Total number of Emergency Loan recipients awarded in FY 2020	0
M.	10% of C	\$ 0.00
N.	*Excess amount = G - M	\$ 0.00

*If N is greater than zero, the excess amount must be transferred back to TPEG.

Common Reporting Issues

- **Negative carry-forward totals**
- **High interest earned amounts**
- **Spending more than what's available**
- **Not spending any funds**
- **Transferring too much TPEG into the emergency loan fund**



Contact Us

Contacting Financial Aid Services

The FAS institutional phone line is **now available!**

CALL: (844) 792-2640

Submit inquiries online through the **CONTACT US** web form.

- Loan reporting requests
- Loan processing changes
- State financial aid program eligibility questions

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From* INSTITUTION ▼

Institution

Contact Reason* *Financial Aid Question ▼

Description* 4000 characters max

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please use the last four digits of your SSN instead.

Is this a complaint No ☒ Yes ☐

Contact Preference E-MAIL ☒ LETTER ☐ PHONE ☐

Salutation* Dr. ▼

First Name*

Last Name*

E-mail*

Phone (10-digit) Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State -- please select State -- ▼ Zip Code (5-digit)

| [Help](#)

Submitting a CONTACT US

To ensure inquiries are routed correctly, complete these steps:

- Select “**Institution**” in Received From box
- Enter the institution’s full name
- Always select “**Financial Aid Question**” as the Contact Reason
- Provide the best **direct phone number**

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From*

Institution

Contact Reason*

Description*

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please use the last four digits of your SSN instead.

Is this a complaint No ☒ Yes ☐

Contact Preference E-MAIL ☒ LETTER ☐ PHONE ☐

Salutation*

First Name*

Last Name*

E-mail*

Phone (10-digit) Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State

Zip Code (5-digit)

| [Help](#)

Contact Information and Feedback

Email: leah.smalley@highered.texas.gov

Webcast Survey: <https://www.surveymonkey.com/r/58YRM92>

Contact Us: <https://www1.highered.texas.gov/Apps/CRAFT/Home/Create>
(Select “Financial Aid Question” as the Contact Reason.)

Questions?