PHEAA and
State Grant & Special Programs Update
2016 PASFAA Annual Conference

James L. Preston
Christine Zuzack
Elizabeth McCloud
## 2016-17 Appropriations

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania State Grant Program</td>
<td>$266.235</td>
<td>$362.132</td>
<td>$305.235</td>
<td>$272.891</td>
<td>2.50%</td>
</tr>
<tr>
<td>Institutional Assistance Grants (IAG) Program</td>
<td>25.121</td>
<td>25.608</td>
<td>24.389</td>
<td>25.749</td>
<td>2.49%</td>
</tr>
<tr>
<td>Matching Funds Program</td>
<td>12.496</td>
<td>13.121</td>
<td>12.496</td>
<td>12.496</td>
<td>0.00%</td>
</tr>
<tr>
<td>Horace Mann Bond - Leslie Pinckney Hill Scholarship Program</td>
<td>.534</td>
<td>.534</td>
<td>1.250</td>
<td>.697</td>
<td>30.52%</td>
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<tr>
<td>Cheyney University Keystone Academy Program</td>
<td>1.525</td>
<td>2.000</td>
<td>2.550</td>
<td>1.813</td>
<td>18.88%</td>
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<tr>
<td>Higher Education for the Disadvantaged (Act 101)</td>
<td>2.246</td>
<td>2.358</td>
<td>2.246</td>
<td>2.246</td>
<td>0.00%</td>
</tr>
<tr>
<td>Higher Education for Blind and Deaf Students</td>
<td>.047</td>
<td>.049</td>
<td>.047</td>
<td>.047</td>
<td>0.00%</td>
</tr>
<tr>
<td>Pennsylvania Internship Program Grant</td>
<td>.350</td>
<td>.350</td>
<td>.450</td>
<td>.350</td>
<td>0.00%</td>
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<tr>
<td>Ready to Succeed Scholarship Program</td>
<td>5.000</td>
<td>5.000</td>
<td>5.000</td>
<td>5.000</td>
<td>0.00%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$313.554</strong></td>
<td><strong>$411.152</strong></td>
<td><strong>$353.663</strong></td>
<td><strong>$321.289</strong></td>
<td><strong>2.46%</strong></td>
</tr>
</tbody>
</table>
8.51% decline in FAFSAs received from 2014-15 to 2016-17

<table>
<thead>
<tr>
<th></th>
<th>2014-15</th>
<th>2015-16</th>
<th>2016-17</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FAFSA</td>
<td>State Grant</td>
<td>FAFSA</td>
</tr>
<tr>
<td>4-YR Private</td>
<td>137,782</td>
<td>109,315</td>
<td>132,552</td>
</tr>
<tr>
<td>PASSHE</td>
<td>88,786</td>
<td>80,673</td>
<td>85,503</td>
</tr>
<tr>
<td>State-Related</td>
<td>100,280</td>
<td>89,409</td>
<td>98,745</td>
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<tr>
<td>2-YR Private</td>
<td>10,360</td>
<td>10,009</td>
<td>9,893</td>
</tr>
<tr>
<td>Community College</td>
<td>127,088</td>
<td>123,111</td>
<td>120,691</td>
</tr>
<tr>
<td>Nursing</td>
<td>2,909</td>
<td>2,474</td>
<td>2,606</td>
</tr>
<tr>
<td>BTT</td>
<td>40,295</td>
<td>38,971</td>
<td>34,385</td>
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<tr>
<td>Out-of-State</td>
<td>109,202</td>
<td>85,234</td>
<td>105,476</td>
</tr>
<tr>
<td>Unknown</td>
<td>14,491</td>
<td>11,797</td>
<td>12,797</td>
</tr>
<tr>
<td>Total</td>
<td>631,193</td>
<td>550,993</td>
<td>602,648</td>
</tr>
</tbody>
</table>
Award History

Maximum and Average State Grants
2009-10 to 2016-17

Academic Year Maximum Grant
Academic Year Average Grant

$4,120
$3,541
$4,348
$4,348
$4,363
$4,011
$4,340
$4,378

$2,747
$2,343
$2,810
$2,927
$3,151
$2,922
$3,261
$3,270


PHEAA
Pennsylvania Higher Education Assistance Agency
Purchasing Power

Average State Grant Program Award Purchasing Power (as % of Tuition & Fees)
2008-09 through 2016-17 and Showing the Impact of PHEAA Supplemental Funding 2011-12 through 2016-17

Average Award as % of Tuition and Fees

Academic Year

25% 20% 15% 10% 5%

Total - No Supplemental Funding
Total - With Supplemental Funding

PHEAA
Pennsylvania Higher Education Assistance Agency
# 2017-18 Budget

<table>
<thead>
<tr>
<th>Programs (in millions)</th>
<th>2015-2016 Budget</th>
<th>2016-2017 Budget</th>
<th>2017-2018 Budget Request</th>
<th>2016-17 to 2017-18 Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA State Grant Program</td>
<td>$266.235</td>
<td>$272.891</td>
<td>$352.029</td>
<td>29.0%</td>
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<tr>
<td>Institutional Assistance Grants</td>
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<td>25.749</td>
<td>27.036</td>
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<td>0.047</td>
<td>0.049</td>
<td>4.3%</td>
</tr>
<tr>
<td>Cheyney University Keystone Academy</td>
<td>1.525</td>
<td>1.813</td>
<td>3.500</td>
<td>93.1%</td>
</tr>
<tr>
<td>Horace Mann Bond-Leslie Pinckney Hill Scholarship</td>
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<td>0.697</td>
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<td>0.350</td>
<td>0.350</td>
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<tr>
<td>Ready to Succeed Scholarships</td>
<td>5.000</td>
<td>5.000</td>
<td>5.000</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$313.554</strong></td>
<td><strong>$321.289</strong></td>
<td><strong>$404.140</strong></td>
<td><strong>25.8%</strong></td>
</tr>
</tbody>
</table>
State Grant
2017-18 Processing

• 7,668 ISIRs received October 3
• SGF available October 1
• Early Estimator available October 3
• Mid-October:
  – SGF emails
  – paper Status Notices and postcards
  – FAA Status Listings/transmission
  – Grant Applicant Status (GAPS) reports
  – Student Display (FG59)
  – Partner Interface activated
SGF Choices

Pennsylvania State Grant Form

State Grant Form Selection

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Next Steps</th>
</tr>
</thead>
</table>
| 2016-17       | Complete Your 2016-17 State Grant Form  
If you have not submitted your 2016-17 PA State Grant Form please complete the form using our online application. |
| 2017-18       | Complete Your 2017-18 State Grant Form  
If you have not submitted your 2017-18 PA State Grant Form please complete the form using our online application. |

Continue >>
Viewing 2017-18 SG Records

For a school listed as a 2 through 10 choice on the FAFSA:

• Cannot see the student’s record in the State Grant system (FG59 or Partner Interface, including FG0B and FG7E).
• Estimates will not be provided via displays, status listings or status transmissions.
• It is possible to not have the ability to view a student’s State Grant record and then be able to view it if subsequent activity from the student changes the first school choice.

• OE CODE ORDER OF SCHOOLS ON THE 2018-19 FAFSAs FOR STATE GRANT AGENCIES!
2017-18 Early Estimator

- 2017-18 Early Estimator released first week of October
- Maximum award of $3,697
- All schools must use for State Grant estimates so that awards are uniform across educational sectors and schools
- Estimator updated as needed
2017-18 Special Consideration

• PHEAA will use estimated 2017 income for special consideration requests.
• October 2017 validation conducted to review accuracy of estimates.
ABLE Accounts

• PA ABLE Act (SB 879) April 18, 2016 - permits savings accounts for individuals with disabilities
• Exempts contributions and earnings from calculation of eligibility for any state financial aid programs – just like PA TAP
• Will take some time for PA Treasury to implement
Bona Fide Five-Year Program

- Permits up to an additional year of State Grant eligibility
- Reported through the annual cost collection effort
- PHEAA review of reported programs revealed many programs misreported
- FG3M display entitled “Five-Year Program” (left side of page 1, line 12) has a code “A”
Program of Study

• Questions on religious programs of study being removed from SGF
2017 Summer State Grant

• Student application period is March 15 through August 15
• Awards not determined until after 2017-18 AY awards are announced
• Minimum number of weeks of enrollment decreased to 5 weeks
Out-of-State Awards

• Reciprocal states for 2016-17 include DC, DE, MA, OH, VT, and WV
• Eligibility for unique programs of study at schools in non-reciprocal states discontinued beginning with 2017-18
Temporary School Closures

• Closures, or the inability to offer all academic services to all students, on a temporary basis due to severe weather, floods, pandemics, terrorist activities, municipal service failures, faculty strikes, etc.
  – If 7 days or less and students will receive grades, contact PHEAA with details
  – If greater than 7 days, file appeal through Institutional Appeals Committee
ACICS

- Accrediting Council for Independent Colleges and Schools lost recognition from USDE
- 46 schools in PA accredited by ACICS
- 14 campuses have already closed in PA
- ACICS appealing ruling
- Schools remain accredited during the appeal
- SG regulations require accreditation
Senate Majority Policy Committee

- October 17, 2106 Hearing to gather information on student loan transparency
- IN and NE legislation model
- Testifiers included:
  - PHEAA
  - State Related Universities
  - PASSHE
  - PA Community College Commission
  - AICUP
SGDEPP

• Legislation in process to end DE pilot program (Act 59 of 2013) one year early and incorporate DE into overall State Grant program for 2017-18
• HB 2337 and SB 1356
• Eligible institutions are headquartered and domiciled in PA
Headquartered and Domiciled

• A survey to schools to ascertain headquartered and domiciled status required by June 30, 2017 for continued participation in the 2017-18 State Grant Program.

• Two new fields will be added to FG3M: “HQ” and “Offer DE.”
2017-18 Cost on the Web

State Grants

- View State Grants Dashboard
  Standard Lists and Worklists
- Create Mass Update Queue
  Create Mass Update Queue
- View Weekly Update and Roster
  Download from PageCenter
- State Grant Disbursement Certification
  Disbursement Certification Form
- View My Exports
  View Exported Student Lists
- Access State Grant & Special Programs
  OC/Webconnect
- State Grant Education Costs
  Education Cost Form
- Request Primary School Change
  Change Primary School in Student Record

PHEAA
Pennsylvania Higher Education Assistance Agency
Program Review Findings

• Beginning with reviews covering the 2016-17 Award Year:
  – Error Rate calculations will be based on miss-payment of a student award by plus or minus $50. This includes non-payment of funds to an eligible student
  – An Administrative Findings section will address deficiencies in program administration
  – A Program Improvement Plan (PIP) may be required to address findings
Ready to Succeed Scholarship

• Average family income: $81,014 - $83,331
• Average GPA is 3.6

<table>
<thead>
<tr>
<th></th>
<th>2014-15</th>
<th>2015-16</th>
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<tbody>
<tr>
<td>Recipients</td>
<td>3,254</td>
<td>3,520</td>
</tr>
<tr>
<td>Unfunded Eligible</td>
<td>8,428</td>
<td>7,125</td>
</tr>
<tr>
<td>Dollars Awarded</td>
<td>$4,790,383</td>
<td>$5,141,371</td>
</tr>
<tr>
<td>Dollar Shortfall</td>
<td>$12,430,218</td>
<td>$10,415,772</td>
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</tbody>
</table>

• 192 participating schools
IAG

- Received an appropriation increase for 2016-17 of 2.5%
- Estimated *per capita* for 2016-17 is $644
- 2015-16 *per capita* is $616
Special Programs

Chafee Education Training Grant
• 2016-17 annual award amount increased to $5,000

PA-TIP
• 2016-17 maximum award = $4,378
• Veterans now eligible for maximum award

Act 101
• Minimum students served reduced to 40
Outreach

- *Funding Your Future* brochure mailed to high school seniors in December
- Updated *PA Student Aid Guide* and many other publications available at pheaa.org
Outreach

• 14 Access Partners ready to assist with financial aid nights, FAFSA Completion events, and other outreach activities
• Contact Will Lindsey at wlindsey@pheaa.org
Program Contacts

• Mailboxes:
  - sghelp@pheaa.org
  - act101@pheaa.org
  - bdbg@pheaa.org
  - eap@pheaa.org
  - iag@pheaa.org
  - swsp@pheaa.org
  - matchingfunds@pheaa.org
  - paetg@pheaa.org
  - path@pheaa.org
  - patip@pheaa.org
  - pegp@pheaa.org
  - rtss@pheaa.org
Questions? Comments?

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  – 717.720.2368  
  – czuzack@pheaa.org  

• Elizabeth McCloud  
  – 717.720.1600  
  – emccloud@pheaa.org