PA State Grant & Special Programs Update
2017 PASFAA Spring Training

Elizabeth McCloud
Vice President, State Grant and Special Programs
PHEAA
## 2017-18 Appropriations

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PHEAA Administered</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Grant Program</td>
<td>$272.891</td>
<td>$352.029</td>
<td>$272.891</td>
<td>0.00%</td>
</tr>
<tr>
<td>Institutional Assistance Grants (IAG)</td>
<td>$25.749</td>
<td>$27.036</td>
<td>$12.874*</td>
<td>-0.50%</td>
</tr>
<tr>
<td>Matching Funds</td>
<td>$12.496</td>
<td>$13.121</td>
<td>$12.496</td>
<td>0.00%</td>
</tr>
<tr>
<td>Higher Education of the Disadvantaged (Act 101)</td>
<td>$2.246</td>
<td>$2.358</td>
<td>$2.246</td>
<td>0.00%</td>
</tr>
<tr>
<td>Higher Education of Blind or Deaf Students</td>
<td>$0.047</td>
<td>$0.049</td>
<td>$0.047</td>
<td>0.00%</td>
</tr>
<tr>
<td>Pennsylvania Internship Program Grants</td>
<td>$0.350</td>
<td>$0.350</td>
<td>$0.350</td>
<td>0.00%</td>
</tr>
<tr>
<td>Ready to Succeed Scholarships</td>
<td>$5.000</td>
<td>$5.000</td>
<td>$5.000</td>
<td>0.00%</td>
</tr>
<tr>
<td><strong>Co-Administered</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bond-Hill Scholarship</td>
<td>$0.697</td>
<td>$0.697</td>
<td>$0.697</td>
<td>0.00%</td>
</tr>
<tr>
<td>Cheyney Keystone Academy</td>
<td>$1.813</td>
<td>$3.500</td>
<td>$1.813</td>
<td>0.00%</td>
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<tr>
<td><strong>Total</strong></td>
<td>$321.289</td>
<td>$404.140</td>
<td>$308.414</td>
<td>-0.04%</td>
</tr>
</tbody>
</table>
Purchasing Power

AVERAGE AWARD AS % TUITION & FEES

25%
20%
15%
10%
5%
0%


15.0% 15.3% 13.4% 13.6% 11.6% 11.4% 10.1% 10.0%
17.2% 16.3% 16.6% 14.9% 14.7% 14.0% 13.4%

PROGRAM YEAR

No Supplemental Funding
Supplemental Funding ($87M Proposed for 2017-18)
## Application History

### History of Applications Received/Awards Made

<table>
<thead>
<tr>
<th>Award Year</th>
<th>Combined Academic Year and Summer State Grant Applications</th>
<th>FAFSA Applications as of December 31</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Award Year</td>
<td>Applications</td>
</tr>
<tr>
<td>2007-08</td>
<td>538,112</td>
<td>174,643</td>
</tr>
<tr>
<td>2008-09</td>
<td>564,789</td>
<td>164,633</td>
</tr>
<tr>
<td>2009-10</td>
<td>631,624</td>
<td>183,217</td>
</tr>
<tr>
<td>2010-11</td>
<td>657,251</td>
<td>192,121</td>
</tr>
<tr>
<td>2011-12</td>
<td>668,067</td>
<td>205,739</td>
</tr>
<tr>
<td>2012-13</td>
<td>683,221</td>
<td>192,386</td>
</tr>
<tr>
<td>2013-14</td>
<td>669,570</td>
<td>178,681</td>
</tr>
<tr>
<td>2014-15</td>
<td>644,472</td>
<td>173,142</td>
</tr>
<tr>
<td>2015-16</td>
<td>610,562</td>
<td>153,684</td>
</tr>
<tr>
<td>2016-17*</td>
<td>583,086</td>
<td>140,000</td>
</tr>
<tr>
<td>2017-18*</td>
<td>559,763</td>
<td>136,000</td>
</tr>
</tbody>
</table>

* Estimated
Early FAFSA

- PHEAA has
  - Provided early outreach through Access Partners
  - Moved-up distribution of publications
  - Released SGF on October 1 with FAFSA release
  - Provided 2017-18 Early Estimator in October
Early FAFSA

• PHEAA will
  – Announce conditional awards in May
  – Announce final awards with passage of the Commonwealth budget
  – Accept Reduced Income occurring in the 2017 calendar year
  – Verification selection based on PHEAA parameters
2017-18 Cost on the Web

PA STATE GRANT PROGRAM
INSTITUTIONAL COST POLICIES AND INSTRUCTIONS
2017-18

PHEAA
Pennsylvania Higher Education Assistance Agency
2017-18 Cost on the Web

• Cost collection applicable for 2017 Summer term and 2017-18 Academic Year
• Opened on March 10
• Due date for submission is April 11, 2017
• Provide room and board amounts for statistical purposes
• 2016-17 costs used if new data is not submitted
2017-18 Cost on the Web

Alec™
THE FINANCIAL AID KNOW-IT-ALL

State Grants

- View State Grants Dashboard
  Standard Lists and Worklists
- 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
2017-18 State Grant Training

THE 2017-18 STATE GRANT PROGRAM WORKSHOPS ARE COMING TO A LOCATION NEAR YOU!

WORKSHOP DATES & LOCATIONS:

June 15, 2017 – La Salle University
June 20, 2017 – Community College of Allegheny County - North
July 13, 2017 – Westmoreland County Community College
July 20, 2017 – Delaware County Community College
July 25, 2017 – King’s College
July 27, 2017 – PHEAA Headquarters

Registration details will be announced in the coming weeks.
## 2017-18 State Grant Training

Workshops offered this summer

<table>
<thead>
<tr>
<th>Location</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>La Salle University</td>
<td>Thursday, June 15, 2017</td>
<td>9:00 a.m. - 1:00 p.m</td>
</tr>
<tr>
<td>Community College of Allegheny County - North</td>
<td>Tuesday, June 20, 2017</td>
<td>9:00 a.m. - 1:00 p.m</td>
</tr>
<tr>
<td>Westmoreland County Community College</td>
<td>Thursday, July 13, 2017</td>
<td>9:00 a.m. - 1:00 p.m</td>
</tr>
<tr>
<td>Delaware County Community College</td>
<td>Thursday, July 20, 2017</td>
<td>9:00 a.m. - 1:00 p.m</td>
</tr>
<tr>
<td>King's College</td>
<td>Tuesday, July 25, 2017</td>
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<td>Thursday, July 27, 2017</td>
<td>9:00 a.m. - 1:00 p.m</td>
</tr>
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</table>
2017-18 State Grant Training

- 2017-18 State Grant Program Handbook
  - *New* Appendix J
    - “Determining Students’ Status and Providing Assistance”
      - Resources for resolving incomplete student records
2016-17 Awards

• Please cancel any active awards for students who are not eligible as currently indicated on school roster

• April 1, 2017 is the deadline for reinstatement or reconsideration of a 2016-17 State Grant award
2016-17 Reconciliation

- 2016-17 AY Reconciliation Rosters generate March 27
- Due date for reconciliation and refunds is June 1
- Sign and submit the Certification Page of the roster, preferably using the **online Web Certification Page** available on Alec
2017 Summer State Grant

- Reminder of change with Summer 2017
  Minimum term = 5 weeks of at least HT enrollment for students in degree-granting programs
- Student application period is March 15 through August 15
- Awards not determined until after 2017-18 AY awards are announced
- Disbursements to schools at calculated percentage of prior three years utilization
Domicile Requirement

Current policy through 2016-17:
Student must be a PA resident for 12 months before May 1 (or August 1), exclusive of enrollment in a PA educational institution.
Domicile Policy

Effective with the 2017-18 Award Year:

Students attending a community college or BTT school located in PA still have to meet the 12 month domicile requirement, however the exclusion of enrollment in school is no longer applicable.
Home School

- Home School instructions for the State Grant Form have been modified
  - to better serve home-schooled students who received a diploma via Act 196
  - graduated on or after October 31, 2014
SAP Clarification

Counting a repeated class when it was first taken during a term in which no State Grant was received.

- First year: no grant, student earns a "D" in one class
- Sophomore year: student takes 24 credits, repeats the "D" class, has a full-time State Grant
- Junior year: Guidelines had changed for 2016-17 to say that repeated course could not be counted and thus the student would fail progress
- Return to previous policy that permitted a repeat course to be counted in this situation
Document Library

• New naming convention for documents
• Reordering of documents in reverse chronological order
• Only retaining documents in the three most recent processing years
Headquartered and Domiciled

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

• Reciprocal states for 2017-18:
  • DC
  • DE
  • MA
  • OH
  • VT
  • WV
SGDEPP: 2016-17

• 2016-17 funding had been exhausted in late fall, leading to Reject N and $-Adjusted notices for some students
• PHEAA was able to make cancellation and reject funds available, and subsequently has been able to fund Spring 2017 awards
• It is likely that funding will also be available for Summer 2017
  – nominate your students!
SGDEPP: 2017-18 and beyond

• 2017-18 is the last year of the five year State Grant Distance Education Pilot Program
  – The program has expanded each year
  – Legislation to integrate stalled in the fall
  – Three potential paths forward for DE
Ready to Succeed Scholarship

• Funds over 3,000 students per year with $5 M
• Approximately $10 M more needed to fund all of the remaining 6,000+ eligible students
• Reconciliation begins early May; due July 1
• August 1 disbursement deadline
IAG

• SG reconciliation must be completed by late April to be reflected on the IAG reconciliation roster in early May
• Estimated *per capita* for 2016-17 is $644, subject to change
• Proposed 2017-18 budget for IAG would lead to an estimated 2017-18 *per capita* of $330
2017 Summer SWSP Application

2017 SUMMER PENNSYLVANIA STATE WORK-STUDY APPLICATION

Frequently Asked Questions

What is the SWSP?
The State Work-Study Program is a FAFSA-approved grant-program made possible through General Assembly funding and with the cooperation of Pennsylvania's post-secondary institutions and employers. The purpose of the SWSP is to provide students with an opportunity to gain career-related work experience and, at the same time, earn funds to assist them in meeting today’s costs for postsecondary education.

How Much Can I Earn?
Eligible students will be notified of their SWSP award and amount, which can be up to $2,000 during the summer term. This award amount is the maximum amount of earnings an employer may submit to PHEAA for placement purposes. However, your employer may choose to pay you more than the fixed award amount.

PHEAA will reimburse your employer a percentage of your dollar earnings up to your SWSP award amounts. Your employer is required to pay you 100% of your earnings. Below are your SWSP award services.

How to Apply

1. DETERMINE IF YOU ARE AN ELIGIBLE STUDENT

To be considered eligible, you must:
- Be a Pennsylvania resident.
- Be enrolled in a degree-seeking institution or have earned 60 credit hours.
- Be in Good Academic Standing and have a cumulative GPA of at least 2.0 or be a rising senior. Want to participate in a degree program.
- Have completed a FAFSA application and been approved for Federal Work-Study.

2. FIND AN ELIGIBLE JOB

To find an eligible SWSP, you can:
- Search for an approved SWSP employer online at PHEAA.org/SWSP-EligibleEmployers.
- License your own employer. Tips for locating an employer, as well as an employer’s work experience, can be found in the program’s employers’ guide.

3. APPLY

To apply for the SWSP, you must:
- Complete Section 1 of the SWSP Application/Placement Form and submit to your personnel employer for completion.
- Submit your completed SWSP Application/Placement Form to PHEAA on or before the filing deadline. PHEAA will verify your eligibility with your personnel employer.

For more information, please visit www.PHEAA.org.

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Pennsylvania Higher Education Assistance Agency

Pennsylvania Higher Education Assistance Agency
2016-17 PA-TIP

- EFC eligibility up to 12000
- Student application deadline is May 1, 2017
- School deadline to certify pending awards is July 1, 2017
- EFC and aid resources are no longer to be included in the award calculation for veterans of the U.S. Armed Forces who were honorably discharged
FAFSA Completion Initiative

- FAFSA Completion Initiative is a presidential initiative promoted by USDE in which PA participates.
- Provides FAFSA completion data to Local Educational Agencies (LEAs) and other designated entities.
- Data elements include:
  - Name, date of birth, zip code, FAFSA submission and processing date, completion status.
High School Initiatives

• PHEAA will continue to send Certificates of Merit to the top 5,000 scorers on SAT/ACT tests.
• FAFSA Completion Initiative continues with high schools and school districts.
• Access Partners conducting FAFSA Completion and College Information presentations.
High School Initiatives

- **Funding Your Future**
  - brochures sent to high school seniors in December
- **Follow-up postcards**
  - to non-FAFSA filers in March
High School Initiatives

NEED MONEY FOR COLLEGE?
START WITH THE FAFSA®
Free Application for Federal Student Aid

PHEAA
PHEAA.org/FAFSA

DEADLINES ARE APPROACHING!

MAY 1
If you plan to enroll in a degree program or a college transferable program at a junior college or other college or university (excludes community colleges and designated PA Open-Admission institutions)

AUGUST 1
If you plan to enroll in a community college, a designated PA Open-Admission institution, a business, trade or technical school, a hospital school of nursing, or a 2-year program that is not transferable to another institution

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TIME is RUNNING OUT...

File the FAFSA today!
Renewal Student Reminder

May 1st is the deadline for submitting your FAFSA if you are applying for a PA State Grant.

You must fill out the FAFSA form again if you are seeking financial aid for the upcoming school year. By submitting the FAFSA online, you take the crucial first step to determine if you qualify for a PA State Grant in addition to Federal Pell Grant, low-cost federal student loans, and many scholarships.

Get Started Today

Filing the FAFSA adds up to money for college.

You are receiving this e-mail because you previously provided PHEAA with your e-mail contact information. If you want to be excluded from future e-mail messages, please unsubscribe here.
Other Web Resources
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?

- Elizabeth McCloud
  - 717.720.1600
  - emccloud@phea.org