

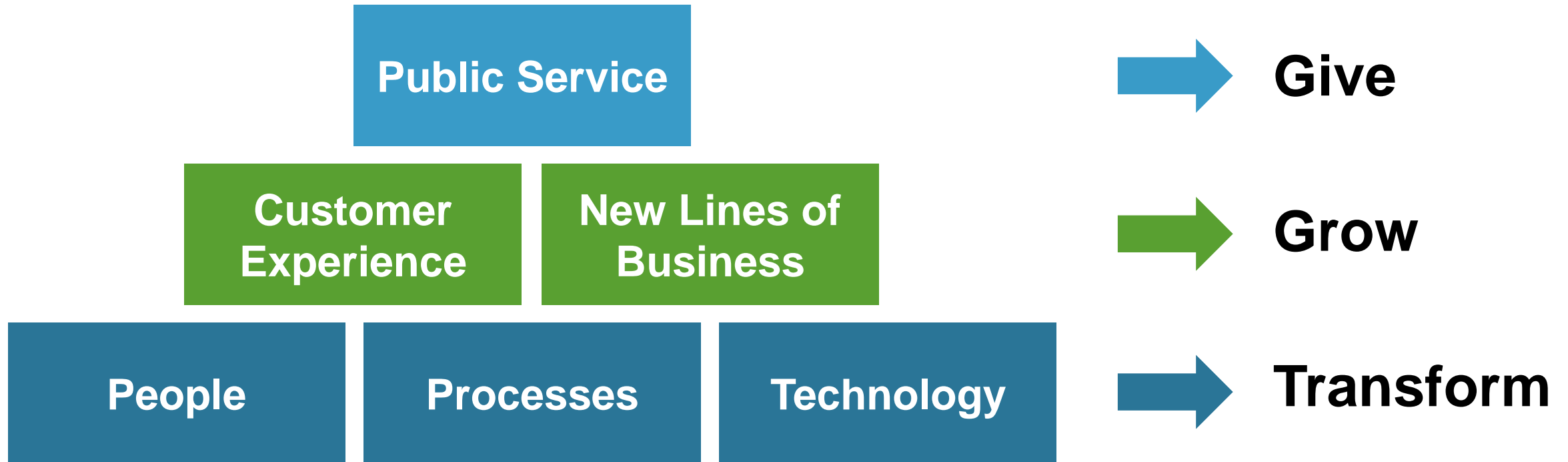


# State Grant & Special Programs Update

Jim Steeley

Elizabeth McCloud

# Creating Access to Higher Education





More than 2,900 Pennsylvania students and families assisted

We have approved loan applications for more than \$47 Million dollars to Pennsylvania students and families

Student Borrowers = 2,038 for \$39.6 million

Parent Borrowers = 381 for \$7.6 million

The weighted average annual interest rate for the program is 6.63%

[PHEAA.org/PA-Forward](https://PHEAA.org/PA-Forward)

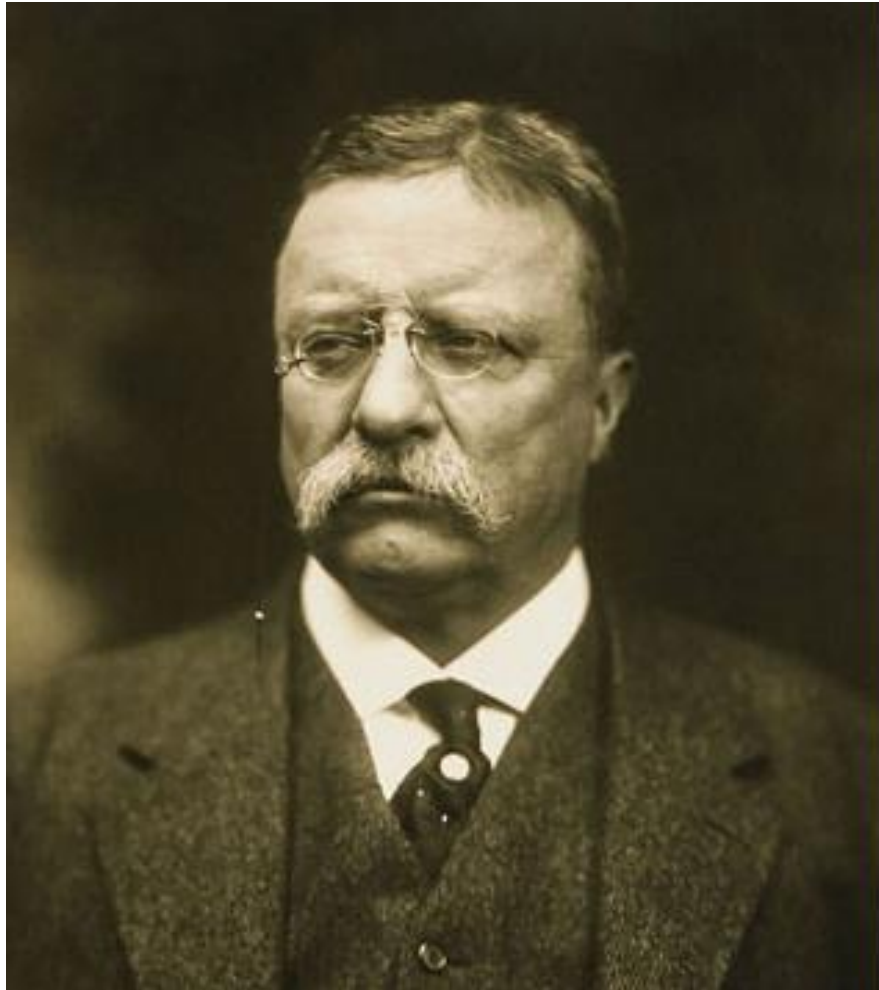
# PA State Grant Program

PHEAA's Board is requesting a \$30 million increase in 2020-21 appropriation funding

- \$340.733 million, a 9.7 percent increase compared to 2019-2020
- If PHEAA finds that the Agency is able, a supplement to the program will be made available.

Focus on maintaining current awards and working toward future increases for students

# Financial Aid Administration



Far and away  
the best prize  
that life offers  
is the chance  
to work hard at  
work worth doing.

- Theodore Roosevelt

# 2018-19 & DE Integration

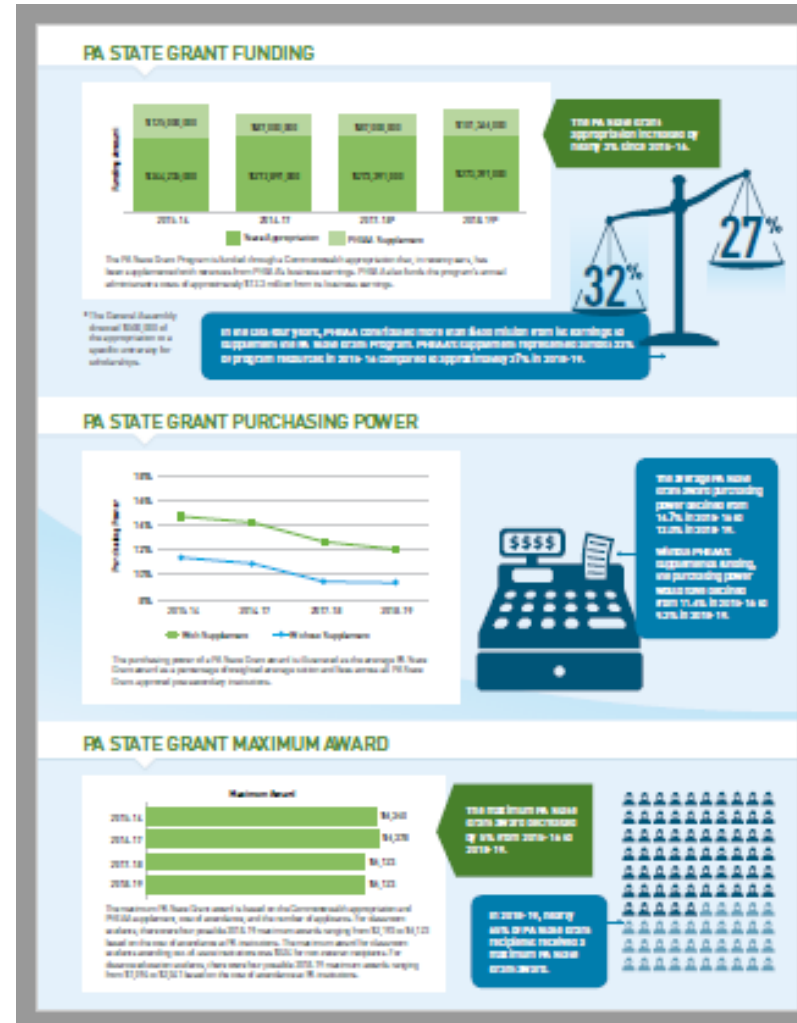
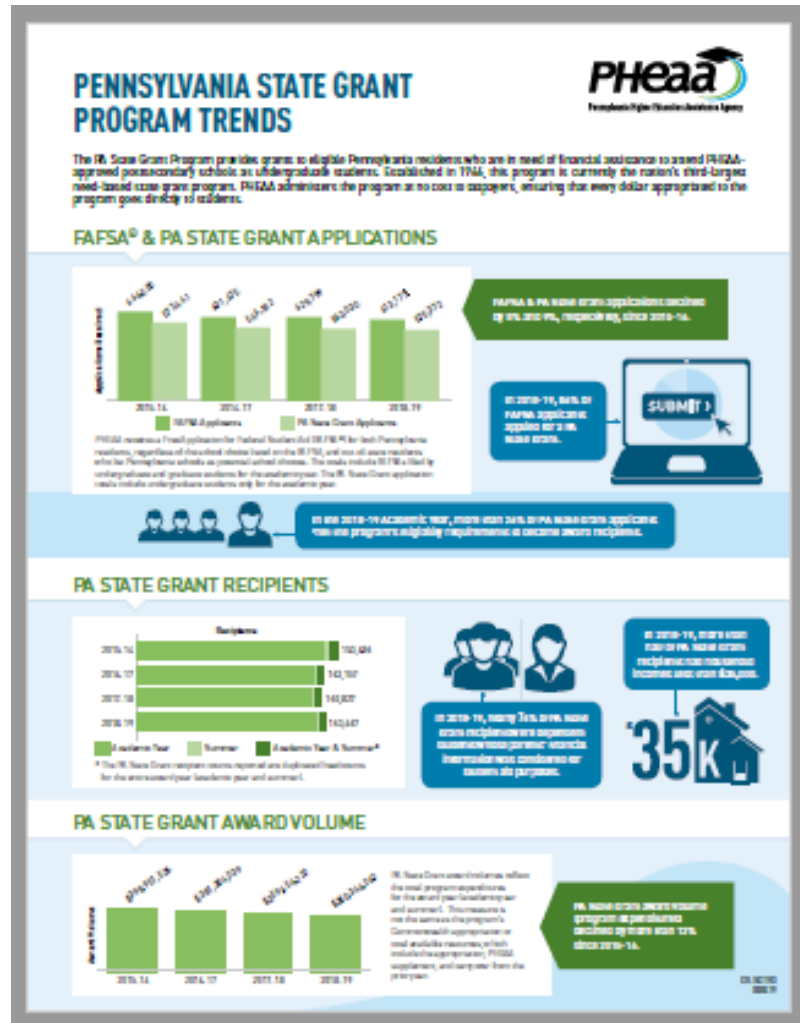
2018-19 Maximum Awards

Cost Tier	Final Maximum Award	Final DE Award
\$0 - \$12,000	\$2,193	\$1,096
\$12,001 - \$19,000	\$3,509	\$1,754
\$19,001 - \$29,000	\$3,772	\$1,886
\$29,001 - \$32,000	\$4,123	\$2,061



New report on 1<sup>st</sup> year of integration available on website

# PA State Grant Program Trends

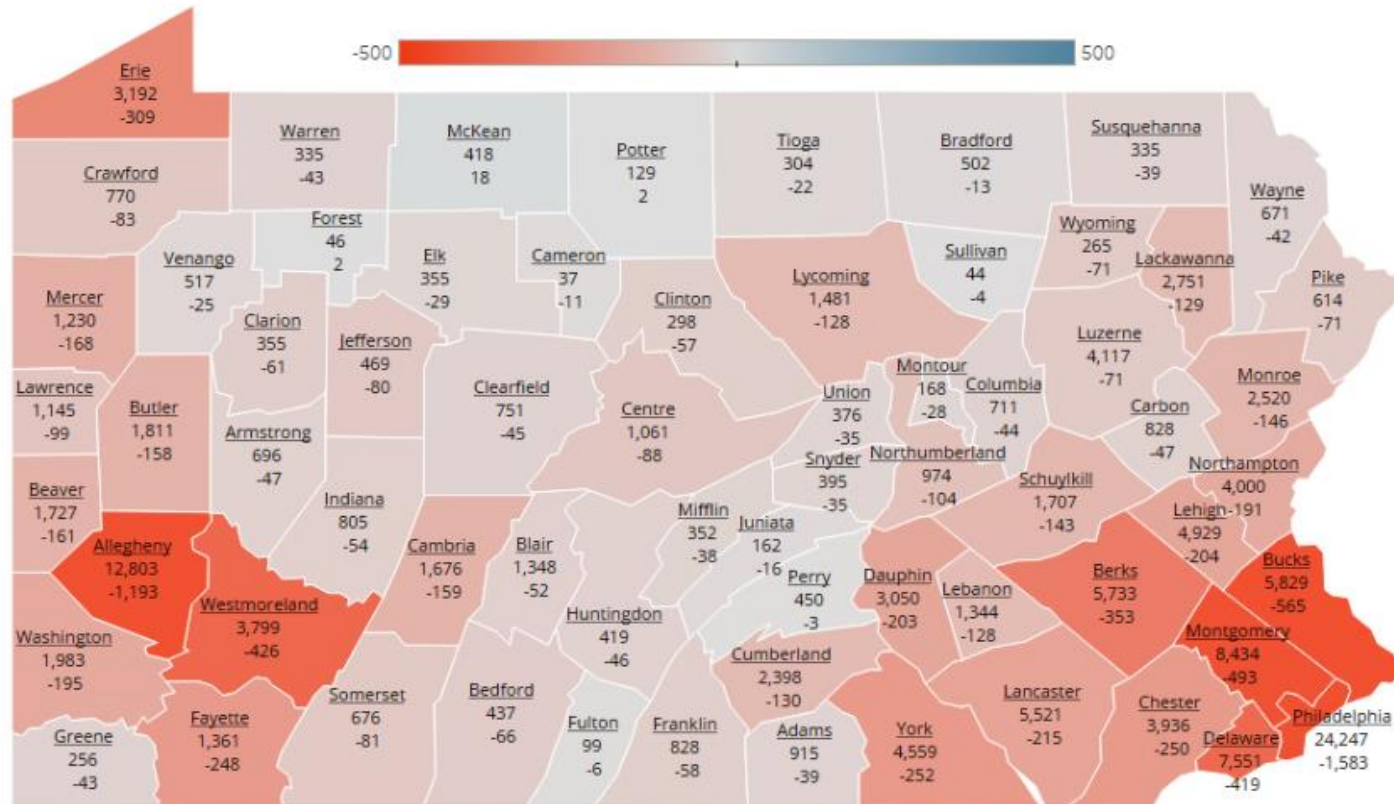




# 2019-20 Comparison to 2018-19

## Pennsylvania State Grant Recipients

The change in the number of PA State Grant recipients from 2018-19 to 2019-20, per County



This map represents each county's change in the number of PA State Grant recipients from 2018-19 to 2019-20, as of August 2, 2019. For each county, the first value represents the number of 2019-20 PA State Grant recipients and the second value represents the decrease or increase in the number of PA State Grant recipients from 2018-19. Overall, the number of PA State Grant recipients in Pennsylvania decreased by 10,323 students or 6.69% from 2018-19 to 2019-20.



# 2019-20 Commonwealth Appropriations

Programs (in millions)	2018-2019 Budget	2019-2020 PHEAA Requested Budget	2019-2020 Governor's Recommendation	2019-2020 Approved Budget	Change from 2018-2019
<b>Pennsylvania State Grant Program</b>	\$273.391*	\$368.233	\$310.233	\$310.733*	13.7%
<b>Institutional Assistance Grants (IAG) Program</b>	26.521	27.847	26.521	26.521	0.0%
<b>Matching Funds Program</b>	12.496	13.121	13.121	13.121	5.0%
<b>Higher Education for the Disadvantaged (Act 101)</b>	2.246	2.358	2.358	2.358	5.0%
<b>Higher Education for Blind or Deaf Students</b>	.047	.049	.049	.049	4.3%
<b>Ready to Succeed Scholarships</b>	5.000	5.250	5.000	5.550	11.0%
<b>Pennsylvania Targeted Industry Program (PA-TIP)**</b>	6.000 (Agency funded)	6.300	6.300	6.300	5.0%
<b>Cheyney University Keystone Academy Program</b>	1.813***	2.500	3.500	3.500***	93.1%
<b>Horace Mann Bond-Leslie Pinckney Hill Scholarship Program</b>	.697	1.800	.800	.800	14.8%
<b>Pennsylvania Internship Program Grants</b>	.450	.450	.450	.450	0.0%
<b>TOTAL</b>	\$328.661	\$427.908	\$368.332	\$369.382	12.39%

\* The appropriation includes \$500,000 for 2018-2019 and \$1,000,000 for 2019-2020 that was directed by the General Assembly to Mansfield University of Pennsylvania.

\*\* PHEAA-supported program for 2018-2019

\*\*\*The General Assembly directed \$500,000 of Agency resources to the program.

# 2019-20 Awards

## Historic Increase to the PA State Grant Program

- Carryover available from PHEAA's 2018-19 resources
- Maintain max award of \$4,123

**2019-20 Maximum Awards**

Cost Tier	Final Maximum Award	Final DE Award
\$0 - \$12,000	\$2,193	\$1,645
\$12,001 - \$19,000	\$3,509	\$2,631
\$19,001 - \$29,000	\$3,772	\$2,829
\$29,001 - \$32,000	\$4,123	\$3,092

Anticipate serving 135,000 students

# 2019-20 Awards

**ESTIMATOR FOR PENNSYLVANIA INSTITUTIONS**  
**2019-20 PENNSYLVANIA STATE GRANT PROJECTIONS**

Enter College Cost, EFC and Academic Schedule

College Cost	\$32,000
EFC	0
Pell	\$6,195
Unmet Need	\$25,805
Percent Multiplier	.50
Enrollment Mode	<b>Classroom</b>
Full Year Award	<b>\$4,123</b>

Distance Ed	<b>\$3,092</b>
	\$1,546
	\$0
	\$1,546

Fall	\$2,061
Winter	\$0
Spring	\$2,061

Academic Schedule	2
-------------------	---

Student's Name and/or SSN

John Smith 123-45-6789
------------------------

EFC	Percent Multiplier
0 to 4,000	50%
4,001 to 6,000	38%
6,001 to 8,000	32%
8,001 to 10,000	27%
10,001 to 12,000	14%
12,001 and above	3%

College Cost	Maximum Award
\$0 to \$12,000	\$2,500
\$12,001 to \$19,000	\$4,000
\$19,001 to \$29,000	\$4,300
\$29,001 to \$32,000	\$4,700

College Cost	Minimum Award
\$0 to \$12,000	\$500
\$12,001 to \$19,000	\$500
\$19,001 to \$29,000	\$500
\$29,001 to \$32,000	\$500

**Dependent and Independent Students with Dependents**

# Validation Review Process Improvements

- The review timeline has been moved to an earlier point in the year.
- In some cases, PHEAA is now automatically updating the student's tax-deferred income based on information from PDR.
- The majority of students are now placed in review before eligibility has been determined.
- Schools will likely experience fewer students who have been placed under review.

# Virtual Hold Callback

Mid-August implementation

If a hold-time crosses over the 5-minute threshold, callers will have the option to provide their phone number for a callback.

One attempt is made to place the callback.

Normal student authentication will occur.

# State Grant Form

## Data Sharing Consent Information

### PA Forward Student Loan Information

Through the PA Forward student loan program, PHEAA offers private loan options for undergraduate, graduate, and parents to enable PA students to pursue their higher education dreams. By selecting this box, you agree to allow PHEAA to send you PA Forward student loan product information.

☐ I agree to receive PA Forward marketing material.



# New Report - Outstanding Items

Includes rosters, refunds, and program-specific reports for all of State Grant and Special Programs.

00312300						
Outstanding Items Report - PHEAA University						
OE Code	Dept	Program	Year	Outstanding Item	Item Date	Item Amount
00322900		SG	2016	REFUND DUE	10/05/2017	\$94,056.00
00322900		FWS-CS	2018	YEAR-END REPORT		
00322900		FWS-ON	2018	YEAR-END REPORT		
00322900		FWS-CS	2019	ALLOCATION REQUEST FORM		
00322900		FWS-ON	2019	ALLOCATION REQUEST FORM		
00322900		FWS-ON	2019	REQUIREMENTS REPORT		

# Meanwhile... 2020-21 Activity is Underway

- October 1 – application window opened
- SGF also available October 1
- Budget request submitted to Governor
- 2018 Income = revised tax forms = FAFSA questions modified

# 2020-21 Processing

## Mid-October:

- SGF emails
- Postcards and paper forms

## Coming in late October/early November:

- Grant Applicant Status (GAPS) reports
- FAA Status Listings/transmission
- Student Display (FG59)
- Partner Interface activated

# 2020-21 Processing

- Tracking 2020-21 FAFSA and PA State Grant Program applicants on a weekly basis to assist with 2020-21 award projections
- Expecting a slight decline in PA State Grant applicants compared with 2019-20

# 2020-21 Funding

Do what you can, with  
what you have, where  
you are.

—Theodore Roosevelt



# 2020-21 Early Estimator

Coming next week!

- Using 2019-20 Pell Charts at this time

All schools must use for PA State Grant estimates

- Provide uniform awards across sectors and schools
- Awards must be +/- \$100 of Early Estimator

EARLY ESTIMATOR FOR PENNSYLVANIA INSTITUTIONS  
2020-21 PENNSYLVANIA STATE GRANT PROJECTIONS

Enter College Cost, EFC and Academic Schedule

College Cost	\$32,000
EFC	0
Pell	\$6,195
Unmet Need	\$25,805
Percent Multiplier	.50
Full Year Award	\$3,694

Fall	\$1,847
Winter	\$0
Spring	\$1,847

Academic Schedule	2
-------------------	---

Student's Name and/or SSN  
John Smith 123-45-6789

EFC	Percent Multiplier
0 to 4,000	50%
4,001 to 6,000	38%
6,001 to 8,000	32%
8,001 to 10,000	27%
10,001 to 12,000	14%
12,001 and above	2%

College Cost	Maximum Award
\$0 to \$12,000	\$2,500
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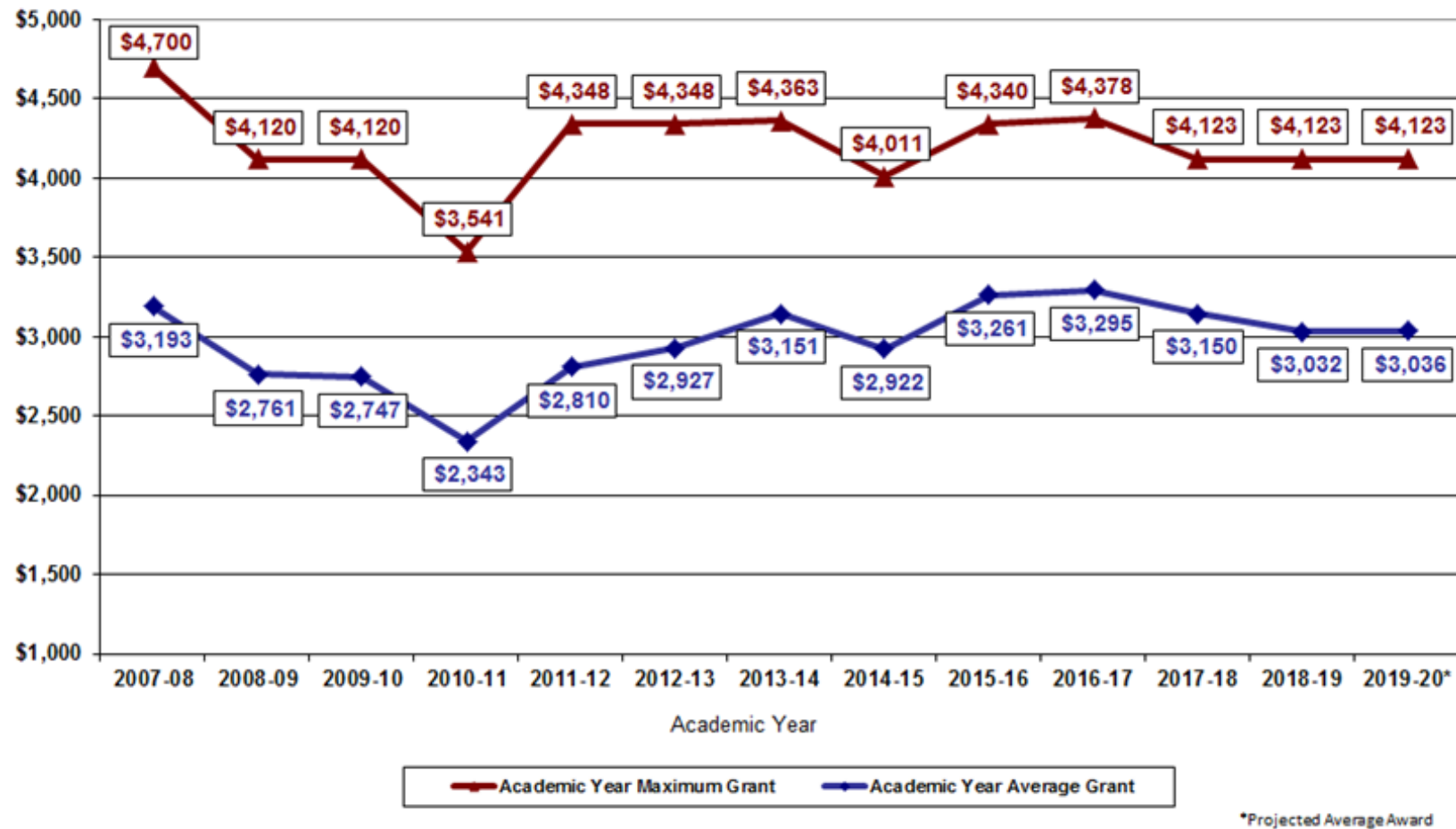
College Cost	Minimum Award
\$0 to \$12,000	\$500
\$12,001 to \$19,000	\$500
\$19,001 to \$29,000	\$500
\$29,001 to \$32,000	\$500

Dependent and Independent Students with Dependents



# Award History

**Average and Maximum PA State Grants to Pennsylvania College Students, 2007 to 2019**



# 2020-21 Budget

## 2020-2021 State Grant and Special Programs Budget Request

Programs (in millions)	2018-2019 Budget	2019-2020 Budget	2020-2021 Requested Budget	2019-2020 to 2020-2021 Percent Change
Pennsylvania State Grant*	\$273.391	\$310.733	\$340.733	9.7%
Institutional Assistance Grants	26.521	26.521	27.847	5.0%
Matching Funds	12.496	13.121	13.777	5.0%
Higher Education for the Disadvantaged (Act 101)	2.246	2.358	2.476	5.0%
Higher Education for Blind or Deaf Students	0.047	0.049	0.051	5.0%
Ready to Succeed Scholarships	5.000	5.550	15.000	170.3%
Pennsylvania Targeted Industry Program (PA-TIP)**	6.000	6.300	6.615	5.0%
<b>Cheyney University Keystone Academy***</b>	1.813	3.500	5.000	42.9%
Horace Mann Bond-Leslie Pinckney Hill Scholarship	0.697	0.800	1.800	125.0%
Pennsylvania Internship Program Grants	0.450	0.450	0.450	0.0%
<b>Total</b>	<b>\$328.661</b>	<b>\$369.382</b>	<b>\$413.749</b>	<b>12.0%</b>

\*The appropriation includes \$500,000 in 2018-2019 and \$1,000,000 in 2019-2020 that was directed by the General Assembly to Mansfield University of Pennsylvania.

\*\* PHEAA-supported program for 2018-2019

\*\*\*The General Assembly directed \$500,000 of Agency resources to the program for 2018-2019 and 2019-2020.

# Ready to Succeed Scholarships (RTSS)

Effective with the Fall 2018 term:

- The minimum GPA requirement for RTSS eligibility increased from 3.25 to 3.50.
- Schools are no longer required to report any student GPA data below the minimum eligible GPA for the program.

The General Assembly, through a trailer budget bill, is suggesting that PHEAA reduce the minimum GPA to 3.25 for 2020-21.

For 2019-20, however, the minimum GPA for RTSS eligibility remains at 3.50.

# Ready to Succeed Scholarships (RTSS)

In 2018-19, there were 38 schools that were approved to participate but didn't nominate any students.

Training materials are available at [pheaa.org/training](https://pheaa.org/training). Please contact PHEAA staff at [rtss@pheaa.org](mailto:rtss@pheaa.org) with any questions.

2020-21 funding request of \$15 million

- It is estimated that this would fund all eligible students with a 3.25 GPA.

- 2018-19 *per capita* of \$654
- Estimated *per capita* for 2019-20 is approximately \$670

# PA-TIP Program of Study Review

Since 2012-13, PA-TIP has awarded grants to students enrolled in short-term programs of study in:

- Energy
- Advanced Materials and Diversified Manufacturing, and
- Agriculture and Food Production

The founding legislation requires that PA-TIP train for “areas of immediate workforce need.”

Review conducted this year, working with PDE and L&I, and consulting with schools that comprise the vast majority of participating PA-TIP institutions.

From this process, a theme of health occupations emerged.



# PA-TIP Expansion for 2019-20

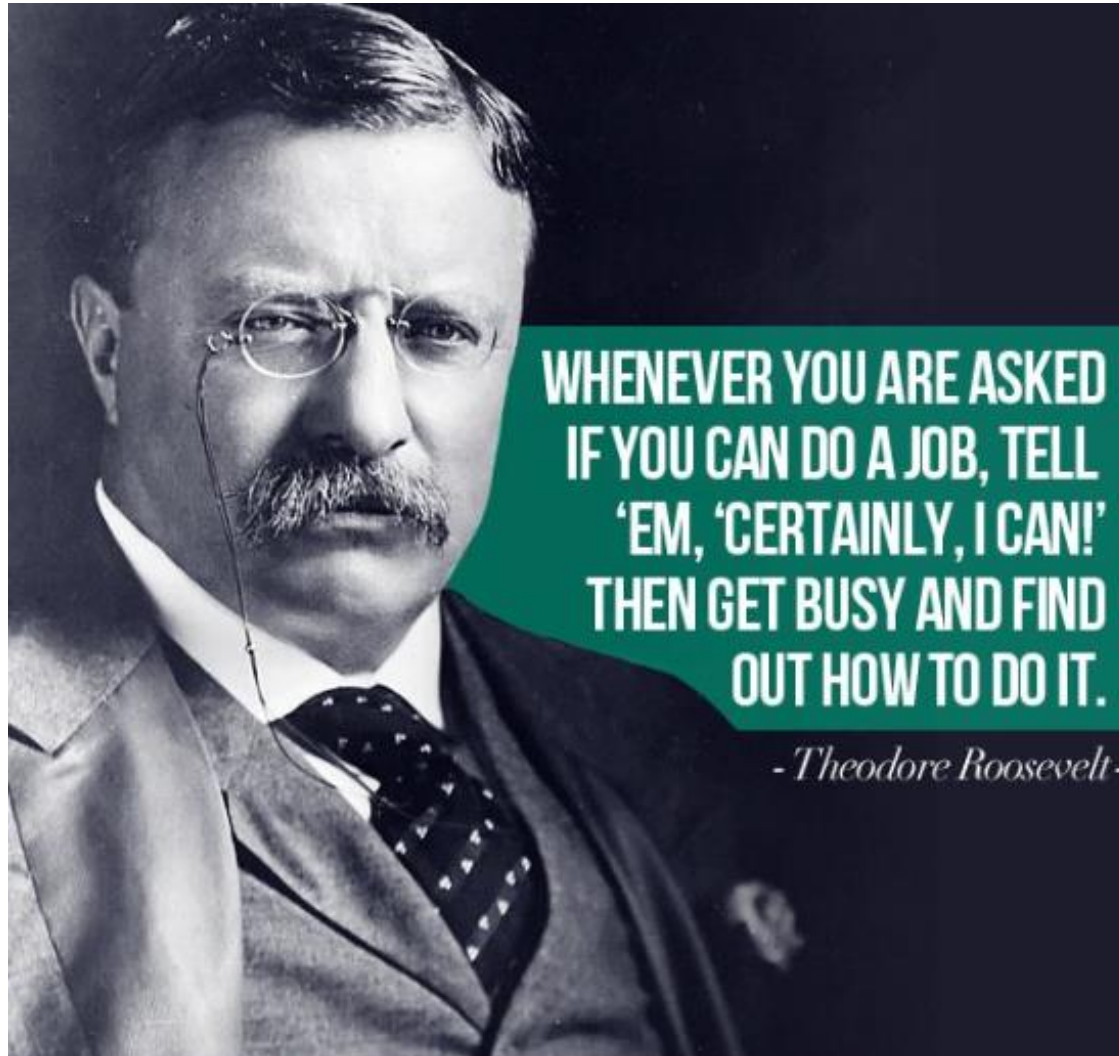
The PHEAA Board of Directors voted on September 19 to expand PA-TIP eligibility to certain eligible health programs of study.

These health programs of study are eligible for the 2019-20 program year.

Healthcare CIP Codes that Require a Short-Term Postsecondary Diploma or Certificate Based on the PA Department of Labor & Industry's 2019 In-Demand Occupations List

CIP Code	CIP Title
51.0601	Dental Assisting/Assistant
51.0707	Health Information/Medical Records Technology/Technician
51.0709	Medical Office Computer Specialist/Assistant
51.0710	Medical Office Assistant/Specialist
51.0712	Medical Reception/Receptionist
51.0713	Medical Insurance Coding Specialist/Coder
51.0716	Medical Administrative/Executive Assistant and Medical Secretary
51.0801	Medical/Clinical Assistant
51.0809	Anesthesiologist Assistant
51.0811	Pathology/Pathologist Assistant
51.0813	Chiropractic Assistant/Technician
51.0904	Emergency Medical Technology/Technician (EMT Paramedic)
51.0909	Surgical Technology/Technologist
51.1009	Phlebotomy Technician/Phlebotomist
51.1012	Sterile Processing Technology/Technician
51.1802	Optometric Technician/Assistant
51.1803	Ophthalmic Technician/Technologist
51.1804	<u>Orthoptics/Orthoptist</u>
51.2601	Health Aide
51.3901	Licensed Practical/Vocational Nurse Training
51.3902	Nursing Assistant/Aide and Patient Care Assistant/Aide
51.3999	Practical Nursing, Vocational Nursing and Nursing Assistants, Other

# Legislation and New Programs



WHENEVER YOU ARE ASKED  
IF YOU CAN DO A JOB, TELL  
'EM, 'CERTAINLY, I CAN!'  
THEN GET BUSY AND FIND  
OUT HOW TO DO IT.

*-Theodore Roosevelt-*

# PA National Guard Education Assistance Program (EAP)

HB 1324 signed into law on July 1, 2019 as Act 32 of 2019

EAP applicants are no longer required to be PA residents.

Schools that charge a technology fee can add it to tuition for both undergraduate and graduate degree candidates, FT or PT.

Graduate degree candidates or those who already hold a bachelor's degree receive the same funding level as an undergraduate part-time student.

# PA National Guard Military Family Education Program (MFEP)

Tuition assistance program for dependents (spouses and children) of PA Guard Members who enter into an additional 6-year service commitment

## Eligible Guard Member:

Someone who completed an initial service obligation, on or after July 1, 2019, in the PA National Guard and eligible to reenlist in the PA National Guard for a period of 6 years

## Eligible Family Member:

Someone who is a spouse or child of a Pennsylvania National Guard member who meets the above criteria and has assigned the benefit to the family member

Someone who is enrolled in a degree or certificate-granting program of study at an approved Pennsylvania institution

# MFEP continued

## MFEP Webpage

<https://www.pheaa.org/funding-opportunities/aid-for-military-national-guard/military-family-education.shtml>

- Program Description
- PA National Guard Member Eligibility Requirements
- PA National Guard Family Member Requirements
- How Much Can I Expect to Receive?
- How Long are Dependents Eligible to Use MFEP?
- How Do I Apply? <https://www.pheaa.org/funding-opportunities/aid-for-military-national-guard/military-family-education.shtml>

# Fostering Independence through Education

Tuition waiver program administered in collaboration with PA Departments of Education, L&I, and Human Services (PA DHS)

PHEAA is developing outreach material for distribution in county youth offices as well as campus aid offices. This material will be available in December 2019.

Also working to establish program guidelines for school and agency use for the 2020-21 academic year

The law requires participating institutions to establish a point-of-contact to be active in verifying youth eligibility for the tuition waiver, where this verification is not readily available to PA DHS or PHEAA.





# Coming Soon...

## **SGSP Not Enrolled Solution for Schools**

A solution for schools looking to report students as not enrolled, when they do not meet existing criteria for the cancel reason (i.e. no award value to cancel).

# PHEAA's Student Loan Notification Solution

## COMING THIS DECEMBER!

### PHEAA's Student Loan Notification Tool

Looking for a cost-effective way to promote student loan awareness and comply with House Bill 2124? PHEAA's NEW Student Loan Notification tool offers a great solution through our comprehensive and secure portal.

#### PA House Bill 2124 Requirements

- Schools must provide student loan debt information to students on an annual basis
- Information must be provided to students no later than July 1 of each year\*

PHEAA has collaborated with the Pennsylvania Department of Education (PDE) to create a solution that satisfies Pennsylvania's provisions of the bill and reporting requirements.

#### Affordable Pricing Options

0-500 Notices Annually	501+ Notices Annually
\$500	\$800

**Note:** Pricing only includes email distribution & a downloadable PDF of notices. A mailing option will be offered in a future enhancement.

# PHEAA's Student Loan Notification Solution

Mark your calendar  
for a **FREE** webinar!

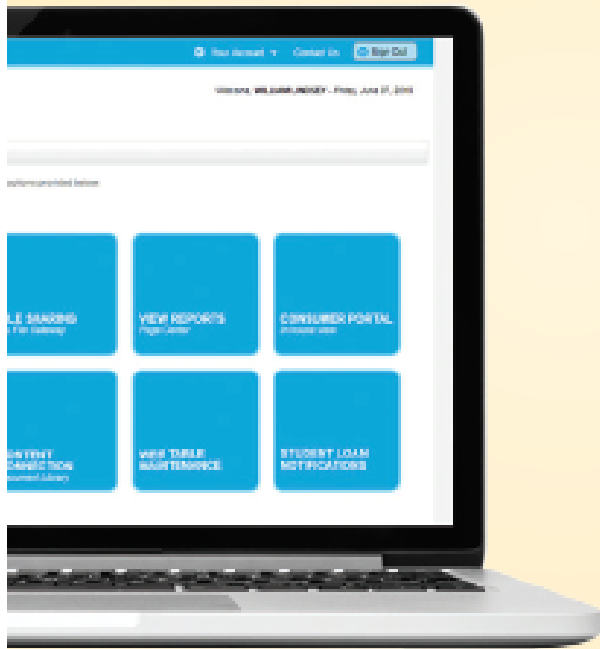
## TOOL DEMO

**OCT 22 - 2:30-3:30PM**

**OCT 23 - 2:00-3:00PM**

Registration available.

You received a registration link via email  
on September 24. Contact William  
Lindsey for additional information.



Contact Will Lindsey  
for the webinar  
registration link:

[wlindsey@pheaa.org](mailto:wlindsey@pheaa.org)

717-720-1529

# Regulatory Review

PHEAA has begun the process of amending and updating its regulations at 22 PA Code §§121.1 – 121.35.

An internal group of staff members are reviewing the regulations and compiling a number of proposed changes.

Our goal in making the proposed changes is to bring the existing regulations up to date and, where feasible, simplify our processes.

- Ex: DE integration



## Resources and Training

Education is of the utmost importance to us here at PHEAA.

That is why we want to ensure that our school, employers, and community partners have easy access to various resources in one easy-to-use location. From this page you will be able to:

- View training events
- Sign up for educational workshops
- Locate resources for many of the PHEAA-administered programs

### > PARTNER INTERFACE TRAINING

Let us help you keep current with the latest tools for postsecondary schools to report and verify key components used in evaluating eligibility and disbursement for PA State Grant awards.

### > STATE GRANT AND SPECIAL PROGRAMS RESOURCES New!

View and download a wide range of resources that will provide you with program-specific information essential for your staff and students.

### > TRAINING EVENTS

View our training events, including those sponsored by Pennsylvania Financial Aid Training (PFAT), Pennsylvania School Services, and PA State Grant and Special Programs.


#### Alec Partner Access

[SIGN IN](#)

[Request/Approve Access System](#)

#### Contact Us

Need more information on the PA State Grant Program or the other Special Programs?

Don't hesitate to [contact us!](#) 

# State Grant & Special Programs Training



- ✓ Featuring PA State Grant and Special Programs
- ✓ Explore difficult eligibility and certification topics
- ✓ Get program updates
- ✓ Ask your questions to PHEAA staff

**Fall Series Registration is Open!**

# 2019-20 Webinar Series

## Fall Schedule

October 30 – **PA-TIP Updates** (2:00PM-3:30PM)

November 21 – SWSP Application & Hours Entry (10:00AM-11:30AM)

December 10 – Chafee Program Overview (2:00PM-3:30PM)

Registration is now open for each of these WebEx sessions.

To sign-up, visit the [Training Events](#) page on PHEAA.org and click the “Register for an upcoming session” link.

# Outreach

- 13 Access Partners ready to assist with financial aid nights, FAFSA Completion events, and other outreach activities
- Contact Will Lindsey at [wlindsey@pheaa.org](mailto:wlindsey@pheaa.org)



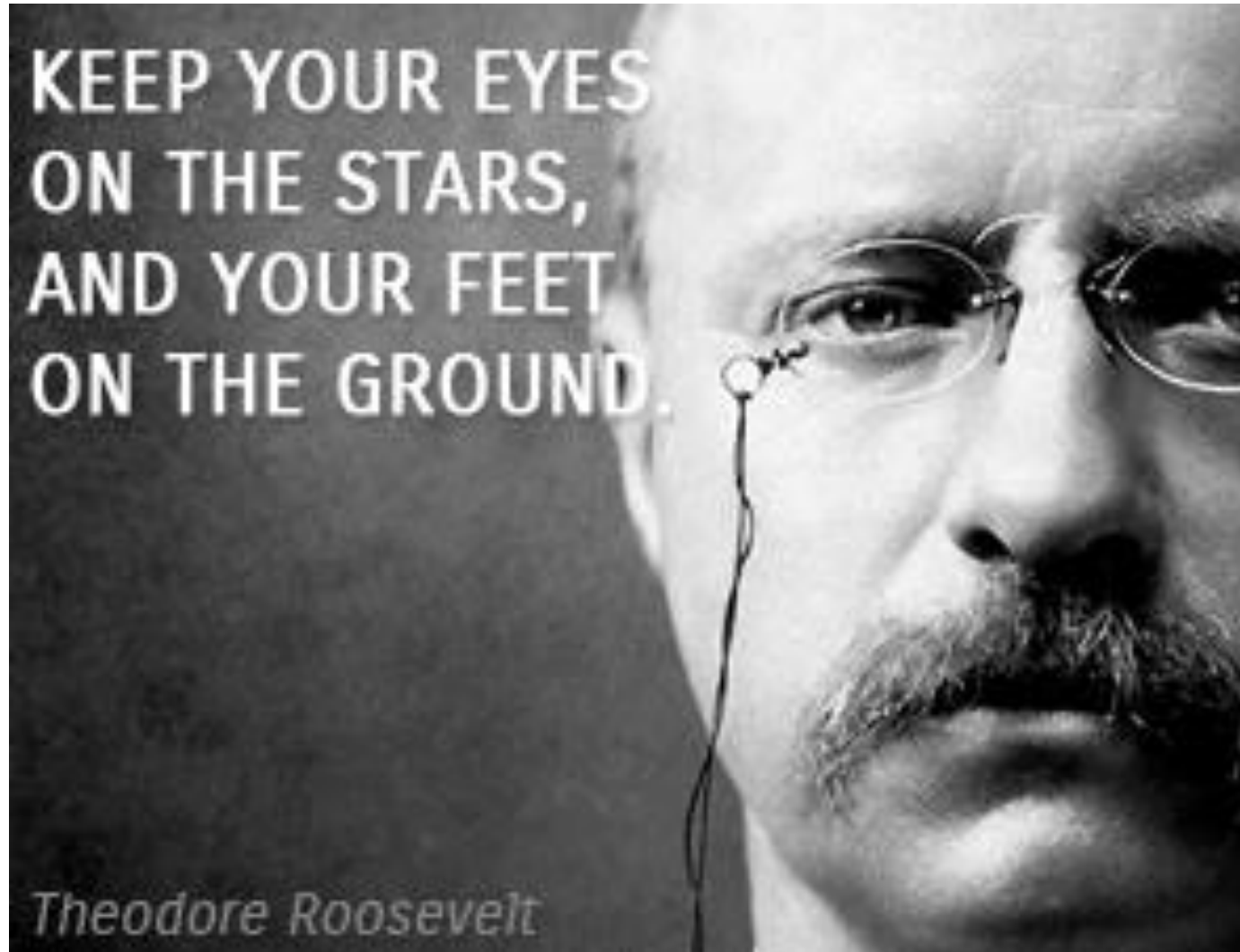


# Social Media

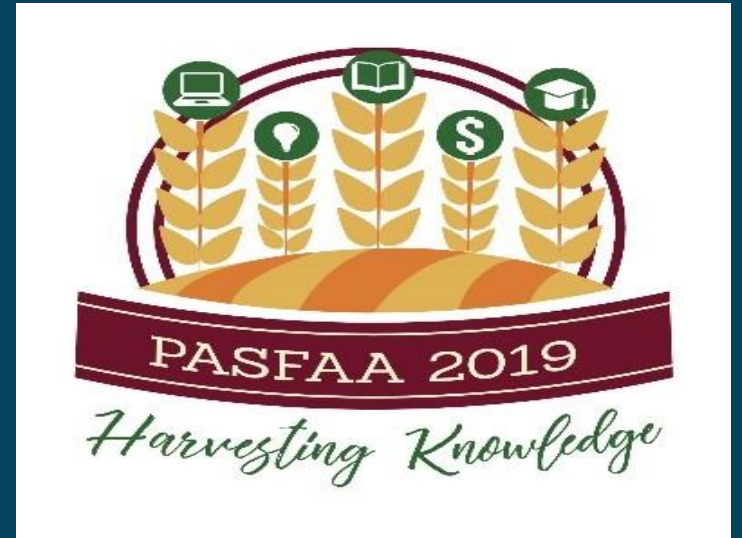
Follow us today!



# Thank you



# Thank You



Elizabeth McCloud  
717-720-1600  
[emccloud@pheaa.org](mailto:emccloud@pheaa.org)



Pennsylvania Higher Education Assistance Agency