Creating Access to Higher Education

People
Processes
Technology
Public Service
Customer Experience
New Lines of Business
Give
Grow
Transform
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
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
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

New report on 1st year of integration available on website

<table>
<thead>
<tr>
<th>Cost Tier</th>
<th>Final Maximum Award</th>
<th>Final DE Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0 - $12,000</td>
<td>$2,193</td>
<td>$1,096</td>
</tr>
<tr>
<td>$12,001 - $19,000</td>
<td>$3,509</td>
<td>$1,754</td>
</tr>
<tr>
<td>$19,001 - $29,000</td>
<td>$3,772</td>
<td>$1,886</td>
</tr>
<tr>
<td>$29,001 - $32,000</td>
<td>$4,123</td>
<td>$2,061</td>
</tr>
</tbody>
</table>
2019-20 Comparison to 2018-19

Creating Affordable Access to Higher Education

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 16,323 students or 6.89% from 2018-19 to 2019-20.
2019-20 Commonwealth Appropriations

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania State Grant Program</td>
<td>$273.391*</td>
<td>$388.233</td>
<td>$310.233</td>
<td>$310.733*</td>
<td>13.7%</td>
</tr>
<tr>
<td>Institutional Assistance Grants (IAG) Program</td>
<td>26.521</td>
<td>27.847</td>
<td>26.521</td>
<td>26.521</td>
<td>0.0%</td>
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<tr>
<td>Matching Funds Program</td>
<td>12.406</td>
<td>13.121</td>
<td>13.121</td>
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<td>5.0%</td>
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<td>Higher Education for the Disadvantaged (Act 101)</td>
<td>2.246</td>
<td>2.358</td>
<td>2.358</td>
<td>2.358</td>
<td>5.0%</td>
</tr>
<tr>
<td>Higher Education for Blind or Deaf Students</td>
<td>.047</td>
<td>.049</td>
<td>.049</td>
<td>.049</td>
<td>4.3%</td>
</tr>
<tr>
<td>Ready to Succeed Scholarships</td>
<td>5.000</td>
<td>5.250</td>
<td>5.000</td>
<td>5.550</td>
<td>11.0%</td>
</tr>
<tr>
<td>Pennsylvania Targeted Industry Program (PA-TIP)**</td>
<td>6.000</td>
<td>6.300</td>
<td>6.300</td>
<td>6.300</td>
<td>5.0%</td>
</tr>
<tr>
<td>*Cheyney University Keystone Academy Program</td>
<td>1.813***</td>
<td>2.500</td>
<td>3.500</td>
<td>3.500***</td>
<td>93.1%</td>
</tr>
<tr>
<td>Horace Mann Bond-Leslie Pinkney Hill Scholarship Program</td>
<td>897</td>
<td>1.800</td>
<td>.800</td>
<td>.800</td>
<td>14.8%</td>
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<tr>
<td>Pennsylvania Internship Program Grants</td>
<td>450</td>
<td>450</td>
<td>.450</td>
<td>.450</td>
<td>0.0%</td>
</tr>
<tr>
<td>**TOTAL</td>
<td>$328.601</td>
<td>$427.908</td>
<td>$368.332</td>
<td>$369.382</td>
<td>12.39%</td>
</tr>
</tbody>
</table>

* 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

Anticipate serving 135,000 students
### 2019-20 Awards

**Creating Affordable Access to Higher Education**

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#### ESTIMATOR FOR PENNSYLVANIA INSTITUTIONS

**2019-20 PENNSYLVANIA STATE GRANT PROJECTIONS**

<table>
<thead>
<tr>
<th>Enter College Cost, EFC and Academic Schedule</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>College Cost</td>
<td>$32,000</td>
</tr>
<tr>
<td>EFC</td>
<td>0</td>
</tr>
<tr>
<td>Pell</td>
<td>$8,195</td>
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<tr>
<td>Unmet Need</td>
<td>$25,805</td>
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<tr>
<td>Percent Multiplier</td>
<td>.50</td>
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<table>
<thead>
<tr>
<th>Enrollment Mode</th>
<th>Classroom</th>
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<tbody>
<tr>
<td>Full Year Award</td>
<td>$4,123</td>
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<tr>
<td>Distance Ed</td>
<td>$3,092</td>
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</table>

<table>
<thead>
<tr>
<th>EFC</th>
<th>Percent Multiplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 to 4,000</td>
<td>50%</td>
</tr>
<tr>
<td>4,001 to 6,000</td>
<td>38%</td>
</tr>
<tr>
<td>6,001 to 8,000</td>
<td>32%</td>
</tr>
<tr>
<td>8,001 to 10,000</td>
<td>27%</td>
</tr>
<tr>
<td>10,001 to 12,000</td>
<td>14%</td>
</tr>
<tr>
<td>12,001 and above</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>College Cost</th>
<th>Maximum Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0 to $12,000</td>
<td>$2,500</td>
</tr>
<tr>
<td>$12,001 to $19,000</td>
<td>$4,000</td>
</tr>
<tr>
<td>$19,001 to $29,000</td>
<td>$4,300</td>
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<tr>
<td>$29,001 to $32,000</td>
<td>$4,700</td>
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</table>

<table>
<thead>
<tr>
<th>College Cost</th>
<th>Minimum Award</th>
</tr>
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<tbody>
<tr>
<td>$0 to $12,000</td>
<td>$500</td>
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<tr>
<td>$12,001 to $19,000</td>
<td>$500</td>
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<td>$500</td>
</tr>
<tr>
<td>$29,001 to $32,000</td>
<td>$500</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic Schedule</th>
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</thead>
<tbody>
<tr>
<td>Student's Name and/or SSN</td>
<td>John Smith 123-45-6789</td>
</tr>
</tbody>
</table>

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**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.
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.

<table>
<thead>
<tr>
<th>OE Code</th>
<th>Dept</th>
<th>Program</th>
<th>Year</th>
<th>Outstanding Item</th>
<th>Item Date</th>
<th>Item Amount</th>
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<tr>
<td>00322900</td>
<td>SG</td>
<td>FWS-CS</td>
<td>2016</td>
<td>REFUND DUE</td>
<td>10/05/2017</td>
<td>$94,056.00</td>
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<tr>
<td>00322900</td>
<td>FWS-CS</td>
<td>2018</td>
<td></td>
<td>YEAR-END REPORT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00322900</td>
<td>FWS-CN</td>
<td>2018</td>
<td></td>
<td>YEAR-END REPORT</td>
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<td></td>
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<tr>
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<td></td>
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<td>FWS-CN</td>
<td>2019</td>
<td></td>
<td>ALLOCATION REQUEST FORM</td>
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<tr>
<td>00322900</td>
<td>FWS-CN</td>
<td>2019</td>
<td></td>
<td>REQUIREMENTS REPORT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
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
Award History

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

*Projected Average Award*
## 2020-21 Budget

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

<table>
<thead>
<tr>
<th></th>
<th></th>
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<tr>
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<tr>
<td>Matching Funds</td>
<td>12.496</td>
<td>13.121</td>
<td>13.777</td>
<td>5.0%</td>
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<tr>
<td>Higher Education for the Disadvantaged (Act 101)</td>
<td>2.246</td>
<td>2.358</td>
<td>2.476</td>
<td>5.0%</td>
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<tr>
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<td>0.047</td>
<td>0.049</td>
<td>0.051</td>
<td>5.0%</td>
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<tr>
<td>Ready to Succeed Scholarships</td>
<td>5.000</td>
<td>5.550</td>
<td>15.000</td>
<td>170.3%</td>
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<td>6.000</td>
<td>6.300</td>
<td>6.615</td>
<td>5.0%</td>
</tr>
<tr>
<td>Cheyney University Keystone Academy***</td>
<td>1.813</td>
<td>3.500</td>
<td>5.000</td>
<td>42.9%</td>
</tr>
<tr>
<td>Horace Mann Bond-Leslie Pinckney Hill Scholarship</td>
<td>0.697</td>
<td>0.800</td>
<td>1.800</td>
<td>125.0%</td>
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<tr>
<td>Pennsylvania Internship Program Grants</td>
<td>0.450</td>
<td>0.450</td>
<td>0.450</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$328.661</td>
<td>$369.382</td>
<td>$413.749</td>
<td>12.0%</td>
</tr>
</tbody>
</table>

*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.
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. Please contact PHEAA staff at 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
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.
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.
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-
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


- Program Description
- PA National Guard Member Eligibility Requirements
- PA National Guard Family Member Requirements
- How Much Can I Expect to Receive?
- How Long are Dependants Eligible to Use MFEP?
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

<table>
<thead>
<tr>
<th>0-500 Notices Annually</th>
<th>501+ Notices Annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500</td>
<td>$800</td>
</tr>
</tbody>
</table>

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

717-720-1529
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

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.
• 13 Access Partners ready to assist with financial aid nights, FAFSA Completion events, and other outreach activities

• Contact Will Lindsey at wlindsey@pheaa.org
Follow us today!
Thank you

KEEP YOUR EYES ON THE STARS, AND YOUR FEET ON THE GROUND.

Theodore Roosevelt
Thank You

Elizabeth McCloud
717-720-1600
emccloud@phea.org