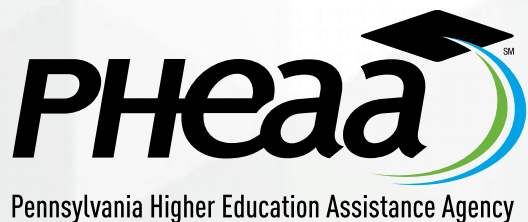


PA State Grant & Special Programs Update

PASFAA 2021



Elizabeth K. McCloud

October 25, 2021

PA State Grant Program – History

- Program began in the 1960s
- Peak appropriation in 2008-09 at \$407.4 million
- Recent History
 - DE Integration in 2018-19 (Act 5 of 2018)
 - HQD schools: full DE integration
 - Non-HQD schools: eligibility unchanged
 - Level funding + PHEAA supplement + CARES \$ in 2020-21

Where We Were – 2020-21 Award Year

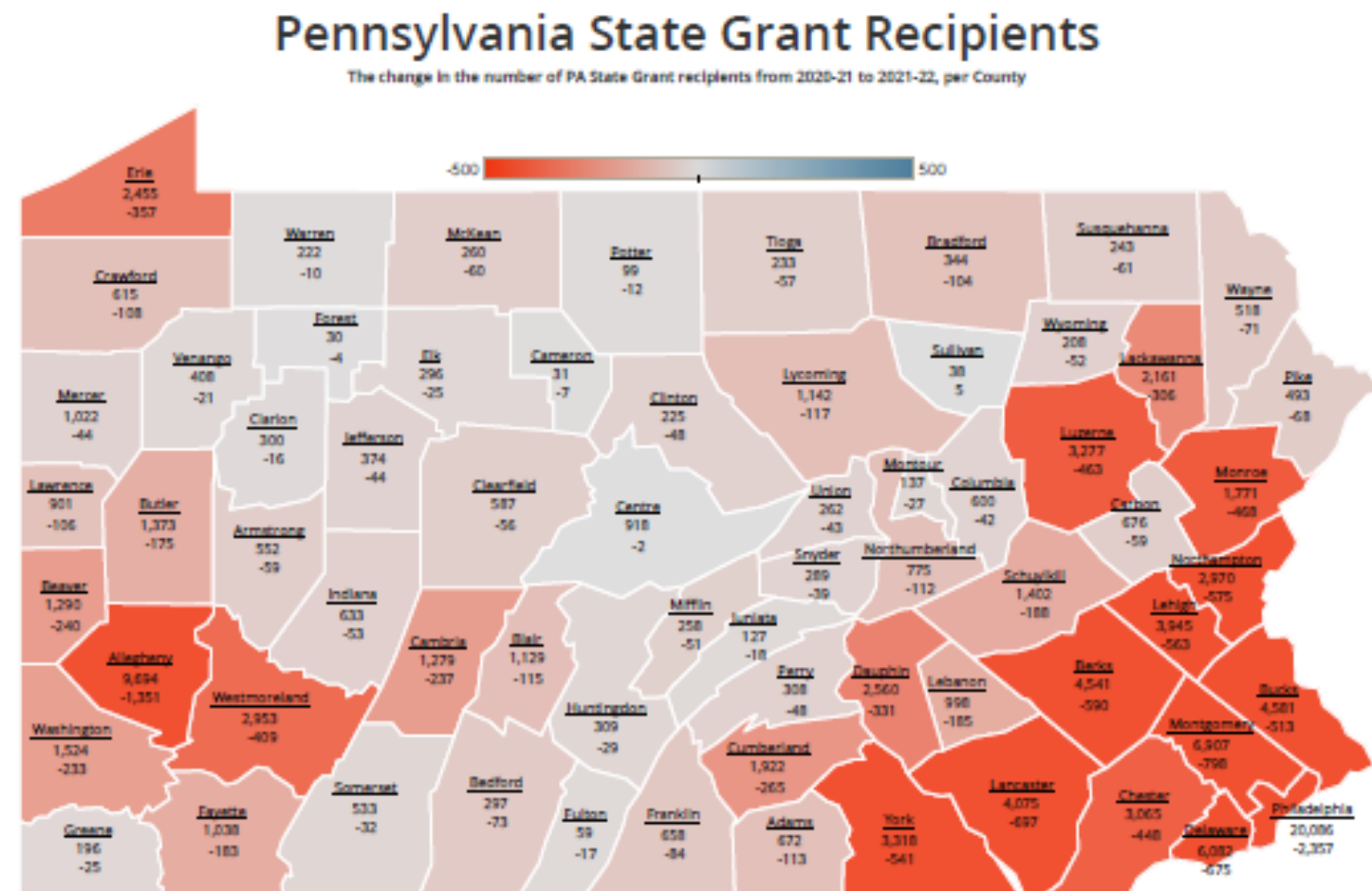
- 2020-21 Awards
 - 2-week extension of May 1 deadline due to COVID impact
 - Level funding of \$310.733 million
 - Added support of up to \$15 million in PHEAA supplement + \$30 million in CARES Act funds
 - Increased max award of \$4,525

Cost Tier	Classroom Maximum Award	Final DE Award
\$0-\$12,000	\$2,407	\$2,407
\$12,001-\$19,000	\$3,851	\$3,851
\$19,001-\$29,000	\$4,140	\$4,140
\$29,001-\$32,000	\$4,525	\$4,525

COVID Impact on the PA State Grant Program

- What has impacted the PA State Grant Program?
 - Ongoing pandemic-related disruption to higher ed
 - Increased cancellation of 2020-21 awards
 - Continued decline in applicants for 2021-22
- What did these factors mean for the program?
 - Attention to impact on students
 - Benefit to recipient award values
 - Focus on the future of higher ed funding in PA

2021-22 Comparison to 2020-21



This map represents each county's change in the number of PA State Grant recipients from 2020-21 to 2021-22, with data through August 1, 2021. For each county, the first value represents the number of 2020-21 PA State Grant recipients and the second value represents the decrease or increase in the number of PA State Grant recipients from 2020-21. Overall, the number of PA State Grant recipients, with a valid Pennsylvania county, decreased by 15,275 students or 11.89% from 2020-21 to 2021-22.

2021-22 Commonwealth Appropriations

PHEAA-Administered Programs	2020-21 Budget	2021-22 Budget
PHEAA-Administered		
Pennsylvania State Grant Program	\$310,733,000*	\$310,733,000*
Institutional Assistance Grants Program <i>Assists independent, postsecondary institutions maintain enrollment levels and stabilize their educational costs.</i>	\$26,521,000	\$26,521,000
Matching Funds Program <i>Provides a match for federal and other funds to postsecondary schools, foundations, and employers. Programs under this umbrella include Federal and State Work-Study Programs and Partnerships for Access to Higher Education (PATH).</i>	\$13,121,000	\$13,121,000
Higher Education for Disadvantaged Students (Act 101) Program <i>Provides support services for undergraduates whose economic or educational backgrounds might impede their ability to successfully pursue higher education opportunities.</i>	\$2,358,000	\$2,358,000
Pennsylvania Blind or Deaf Higher Education Beneficiary Grant Program <i>Helps to defray the necessary expenses of any PA blind or deaf student enrolled in an eligible institution of higher education.</i>	\$49,000	\$49,000
Ready to Succeed Scholarship Program <i>Funding for high-achieving students from middle-income Pennsylvania families.</i>	\$5,550,000	\$5,550,000
Pennsylvania Targeted Industry Program <i>Provides student grants for programs of study less than 2 years in length in the energy, health, agriculture, or manufacturing fields.</i>	\$6,300,000	\$6,300,000
Pennsylvania Internship Program <i>Provides scholarships to PA residents attending PA-based colleges and universities and pursuing an internship through The Washington Center for Internships and Academic Seminars.</i>	\$450,000	\$450,000
Horace Mann Bond-Leslie Pinckney Hill Scholarship Program (Co-Administered with PDE)	\$800,000	\$800,000
Cheyney University Keystone Academy Scholarship Program (Co-Administered with PASSHE)	\$3,500,000	\$3,500,000

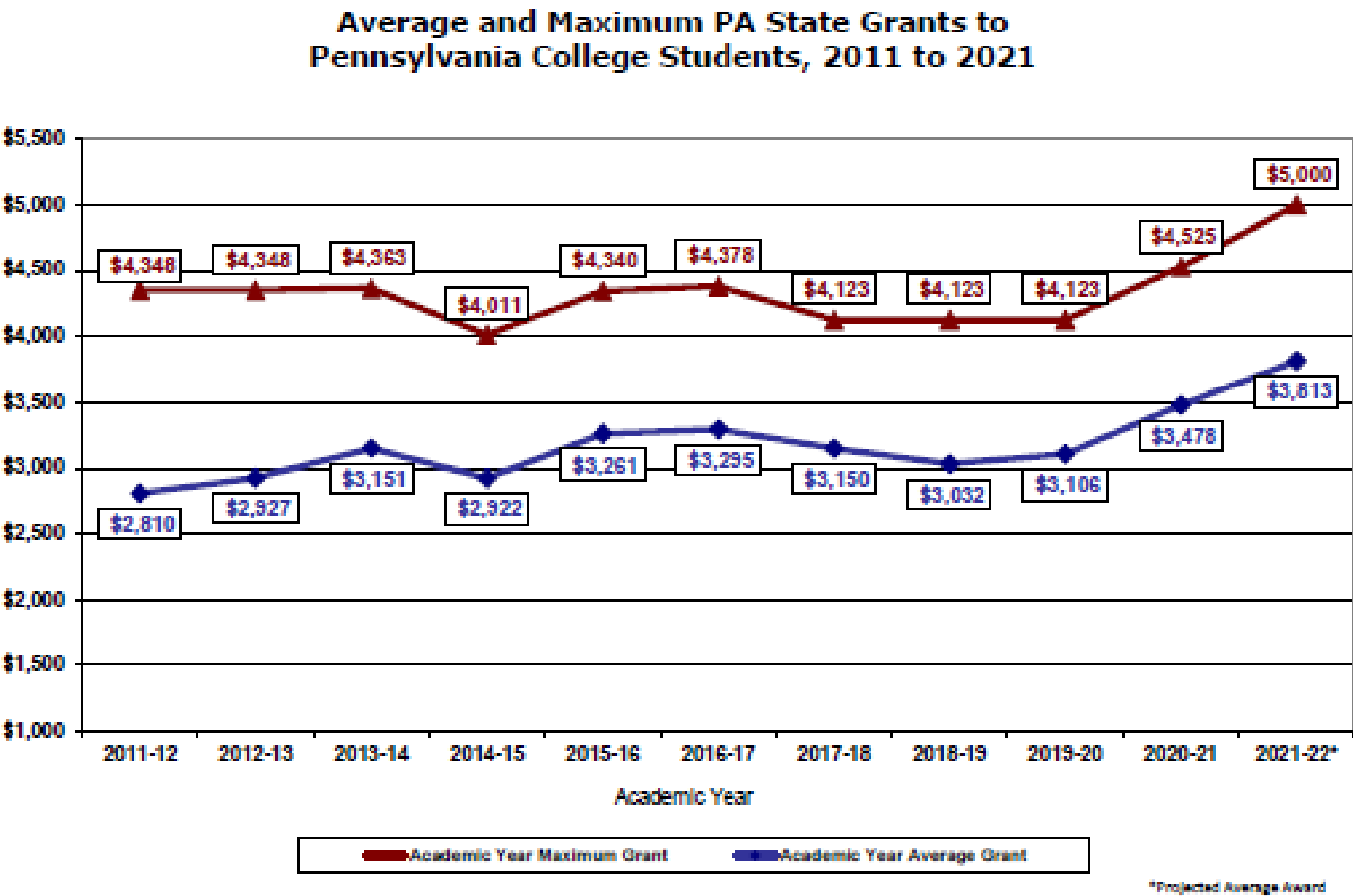
Where We Are – 2021-22 Award Year

- Appropriation
 - Level-funded at \$310.733 million
- Supplementation
 - Up to \$15 million from PHEAA's business earnings
 - Increased carryover due to 2020-21 cancellations
- Drop in Applications
- Drop in Recipients
- 2021-22 Awards
 - **Highest** max award in program history! \$5,000

2021-22 PA State Grant Program Awards

2021-22 PA State Grant Program Awards		
College Cost Tiers	Minimum Award	Maximum Award
\$0 to \$12,000	\$500	\$2,660
\$12,001 to \$19,000	\$500	\$4,254
\$19,001 to \$29,000	\$500	\$4,574
\$29,001 to \$32,000	\$500	\$5,000

PA State Grant Award History



Where We Are Headed – 2022-23 Activity is Underway!

- October 1 – application window opened
- PA State Grant application also available October 1
- Mid-October:
 - SGF emails
 - Postcards and paper forms
- Coming this week and next week:
 - Grant Applicant Status (GAPS) reports
 - FAA Status Listings/transmissions
 - Student Display (FG59)
 - Partner Interface activated
- Budget request submitted to Governor

2022-23 Budget Request

2022-2023 PA State Grant and Special Programs Budget Request

Programs (in millions)	2021-2022 Budget	2022-2023 Requested Budget	2021-2022 to 2022- 2023 Percent Change
Pennsylvania State Grant Program*	\$310.733	\$350.370	12.8%
Institutional Assistance Grants (IAG) Program	26.521	27.184	2.5%
Matching Funds Program	13.121	13.449	2.5%
Act 101 Program	2.358	2.417	2.5%
PA Blind or Deaf Higher Education Beneficiary Grant Program	0.049	0.050	2.5%
Ready to Succeed Scholarship Program	5.550	16.375	Funding to Meet Demand
Pennsylvania Targeted Industry Program (PA-TIP)	6.300	8.652	

2022-23 Budget Request (cont'd)

- **PA Ready to Succeed Scholarship (RTSS) Program**
 - Available resources do not meet need of all eligible students
 - \$16.375 million requested
- **PA Targeted Industry Program (PA-TIP)**
 - Demand exceeds resources
 - \$8.652 million requested
- **Matching Funds, IAG, Act 101, and BDBG**
 - 2.5% increase requested

2022-23 Early Estimator

- Released October 13, 2021
 - Using 2021-22 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

ESTIMATOR FOR PENNSYLVANIA INSTITUTIONS
2022-23 PENNSYLVANIA STATE GRANT PROJECTIONS

Enter College Cost, EFC and Academic Schedule

College Cost	\$32,000
EFC	0
Pell	\$6,495
Unmet Need	\$25,505
Percent Multiplier	.50

Full Year Award	\$4,401
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Fall	\$2,200
Winter	\$0
Spring	\$2,200

Academic Schedule	2
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Student's Name and/or SSN
Taylor 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
\$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

Partner Interface Enhancements

- Review and certify Disbursement Rosters
- Memo to schools in early October
- Training video available on PHEAA.org/training
- Replaces the roster certification page in Doc Library



School Portal
**State Grant Partner Interface
User Guide**



Partner Interface Enhancements

- Rosters & Disbursements

Rosters & Disbursements

[View Weekly Update and Roster](#) [Download from PageCenter](#)

▼ Disbursement Summary (Last Updated 08/31/2021)			
Total Awards	\$540,941.00	Total Special Checks	\$0.00
Calculated Disbursements	\$559,197.00	Total College Refund	\$0.00
Adjusted Disbursement	\$447,358.00	Total Program Review Refund	\$0.00
Actual Disbursed Amount	\$447,358.00	Total PHEAA Collectible Refund	\$0.00
Less Prior Year Refund	\$0.00	Balance Due to PHEAA	\$0.00
		Balance Due to Institution	\$93,583.00

- Certification Statement

Certification Statement

Close

By selecting to certify this roster, I am confirming that I am an authorized representative of the educational institution displayed and that:

SUMMER DISBURSEMENT

Incomplete

Status

08/03/2021

Disbursement Roster Date

Certify Roster

PageCenter Reminders

- Internet Explorer or Microsoft Edge browsers
- If you encounter issues viewing or printing data, ensure that your plugins are up to date
- Check out the SGSP Resources page on PHEAA.org/training for our PageCenter tips and a User Guide
- Review Outstanding Items Report
- Future Program Review findings for missed roster, report, and refund deadlines

Selective Service & Title IV Drug Conviction Questions

- Under the FAFSA Simplification Act, the U.S. Department of Education (ED) has removed the Selective Service and drug conviction requirements for Title IV eligibility.
- There is no impact to the PA State Grant Program or PHEAA-administered special programs since the responses to these two questions were not and are not used in eligibility determination.

Unemployment Compensation & 2020 Taxes

- The American Rescue Plan, signed into Law on March 11, 2021, made the first \$10,200 of 2020 unemployment compensation benefits non-taxable for each taxpayer with incomes less than \$150,000.
 - Up to \$20,400 excluded for those who filed as married filing jointly with both taxpayers having received unemployment benefits.
- If you are aware of a student or parent who:
 - Reported all their unemployment compensation as income when filing their 2020 U.S. Income Tax Return, or
 - Reported the excluded unemployment benefits as untaxed income on their 2022-23 FAFSA.
- Please advise them to send PHEAA a complete copy of their 2020 U.S. Income Tax Return, as filed with the IRS, including their unemployment tax statements, W-2 forms, and all other forms and schedules for PA State Grant staff to review.

2021-22 October Verification

- October verification letters were sent out on Wednesday, October 6 to students who were processed based on reduced income for the fall term of 2021-22.
- In order to determine the student's eligibility for the winter and spring terms, students must provide an updated estimate of income from January 1, 2021 through December 31, 2021 for:
 - Parents (if dependent), or
 - Student and spouse (if independent).
- These forms are sent one time only to those previously processed on reduced income.

PA Ready to Succeed Scholarship Program

- The initial 2021-22 PA Ready to Succeed Scholarship (RTSS) Program eligibility run was conducted on Wednesday, October 13, making awards available for schools to certify.
- Eligibility and review letters were sent to RTSS students last week.
- The first fall disbursement will run this Wednesday, October 27.
 - As a reminder, only awards that are certified by the institution are eligible for disbursement.

Chafee Education & Training Grant Program

- PHEAA partners with the Pennsylvania Department of Human Services (DHS) in the administration of the Chafee Education and Training Grant (Chafee ETG) Program.
- The Consolidated Appropriations Act, 2021 provided funding and temporary expansion of the eligibility within the program.
- **Funding:** Following consultation with PHEAA, DHS made the decision to raise the maximum award for Chafee ETG eligible youth to \$6,000.
 - This award increase extends to students that apply by the Dec 31, 2021 deadline.
- **Eligibility:** Students who applied by September 30, 2021 had expanded eligibility.
 - Youth are eligible for services until age 27.
 - The satisfactory academic progress (SAP) requirement is waived.
 - Youth may utilize the grant for less-than-half-time enrollment.
 - Unmet cost is not considered in determining need.

PA Targeted Industry Program (PA-TIP)

2019-20

- Expansion to include select health programs of study

2020-21

- Realignment of eligible programs of study utilizing the PA IDOL

***NEW* for 2021-22**

- Policy changes to simplify and standardize treatment for all programs/terms
 - Standardization of terms
 - Calculation of student awards
 - Program-level award counter
 - Summer award consideration
 - Applicant Certification and Status Listing (ACSL) reporting elements

PA Targeted Industry Program (PA-TIP)

2021-22 Policy Changes

- **Term Standardization:** PA-TIP is standardizing quarter, semester, and clock hours into “terms” which will follow the traditional semester schedule.
- **Award Calculation Process:** For full-time students, the award amount is the lesser of the student’s total program costs minus all gift aid resources OR the PA-TIP max award.
- **Applicant Certification & Status Listing Changes:** No longer required to report student-level data such as gift aid, Pell, or EFC to PHEAA.
- **Student Auto-Renewal:** All students awarded in the current year with remaining terms of eligibility will have their PA-TIP Application automatically renewed for the new program year.
- **Programs Longer than 60 Weeks:** PA-TIP eligible programs that are over 60 weeks in length will automatically be considered as part-time programs.
- **Term Length:** Terms and pay periods exceeding the maximum term length of 18 weeks will require a student to be enrolled in additional credits/clock hours to meet the FT requirement.

Act 101 Program – 50th Anniversary

- The Act 101 Program is a state-funded program, administered by PHEAA, which allocates funds to PA schools that operate an Act 101 Program at their institution.
- Schools use these funds to provide services to academically and financially qualified students to assist them in successfully completing their higher education.
- In celebration of 50 years of helping students, visit PHEAA.org/Act101video to hear Act 101 directors, alumni, and current students shared their stories.



Student Loan Relief for Nurses (SLRN) Program

- Financial incentive for nurses who have worked during the pandemic to continue, and for those considering leaving the profession due to COVID-19 to reconsider
- PHEAA will make payments direct to loan servicers
- Each nurse enrolled in the program will be eligible to receive up to \$7,500 in payments to reduce their outstanding student loan debt
 - Payments are capped at \$2,500 per year for 3 years
- Working with Governor's Office and PA Departments of State and Human Services to build out the framework of this new program
- Information on [PHEAA.org](https://www.pheaa.org) coming soon!
- Application window targeted to open January 1, 2022

Student Loan Relief for Nurses (SLRN) Program

- To be eligible, a nurse must:
 - be licensed through the Department of State;
 - be a resident of the Commonwealth; and
 - work in a “qualifying nursing facility” and have begun work prior to December 31, 2021
 - A qualifying nursing facility includes:
 - assisted living residences
 - home care agency
 - home health care agency
 - hospital
 - living independence for the elderly program
 - long-term care facility
 - personal care home
 - pre-K through 12 education facility

Program Contacts

- Need more information on the PA State Grant Program or the other Special Programs?
- Don't hesitate to [contact us!](#)

PA STATE GRANT & SPECIAL PROGRAMS CONTACT LIST



IF YOU ARE A FINANCIAL AID OFFICER, EMPLOYER, OR PARTNER, YOU MAY CONTACT US...

BY PHONE	800-443-0646 Toll-Free (United States, Canada) Representatives are available Monday to Friday 8:00 AM to 5:00 PM (ET)	
BY FAX	717-720-3786	
BY MAIL	PHEAA (Insert Specific Program Name) P.O. Box 8157 Harrisburg, PA 17105-8157	
BY EMAIL	Act 101 Program	act101@pheaa.org
	Blind or Deaf Beneficiary Grant (BDBG) Program	bdbg@pheaa.org
	Cheyney University Keystone Academy Program	cheyneykeystone@pheaa.org
	Federal Work-Study On-Campus (FWS-ON) & Federal Work-Study Community Service (FWS-CS) Programs	matchingfunds@pheaa.org
	Fostering Independence Tuition Waiver (FosterEd) Program	fostered@pheaa.org
	Horace Mann Bond - Leslie Pinckney Hill Scholarship Program	bondhill@pheaa.org
	Institutional Assistance Grants (IAG) Program	iag@pheaa.org
	Military Family Educational Program (MFEP)	mfep@pheaa.org
	National Guard Educational Assistance Program (EAP)	eap@pheaa.org
	Partnerships for Access to Higher Education (PATH) Program	path@pheaa.org
	Pennsylvania Chafee Education and Training Grant (Chafee/ETG) Program	paetg@pheaa.org
	Pennsylvania State Grant Program	sghelp@pheaa.org
	Pennsylvania Targeted Industry Program (PA-TIP)	patip@pheaa.org
	Pennsylvania State Work-Study Program (SWSP)	swsp@pheaa.org

Postsecondary Educational Gratuity Program (PEGP) and Act 105 Programs	pegp@pheaa.org
Ready to Succeed Scholarship (RTSS) Program	rtss@pheaa.org

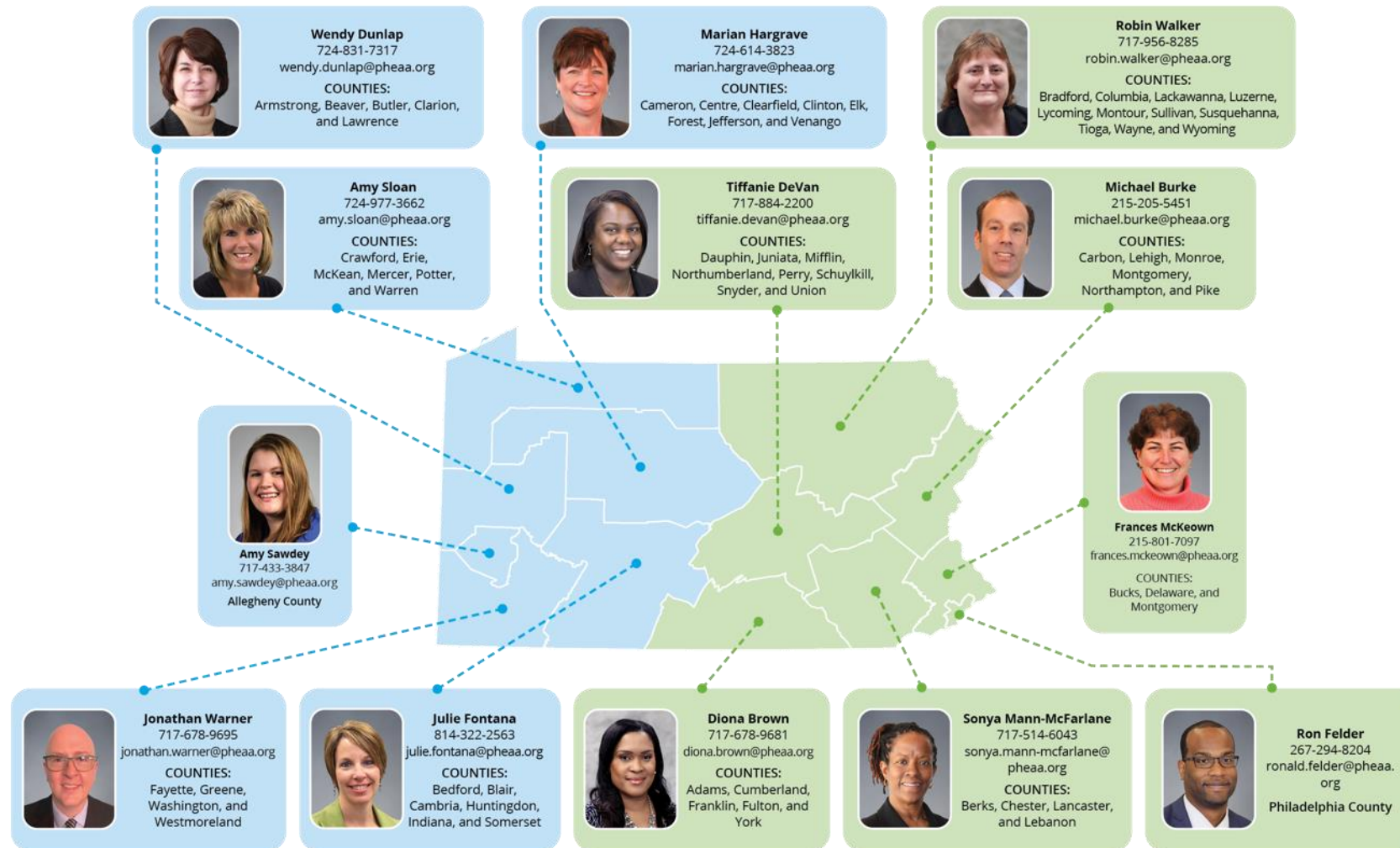
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2021-22 Webinar Series



- PHEAA.org/training
- The Role of the FosterEd POC,
 - Thursday, November 18, 2021 at 10 a.m.
- Spring series coming soon!
 - To sign-up, visit the [Training Events](#) page on PHEAA.org and click the “Register for an upcoming session” link.

PA School Services – Higher Education Access Partners



Get Social w/ PHEAA



PHEAA
American Education Services
FedLoan Servicing



@PHEAAaid
@FedLoan Servicing
@aesSuccessorg



PHEAA

Financial Aid Community

commonwealth noun



Save Word

com·mon·wealth | \ 'kă-mən-,welth also -,welth \

Definition of *commonwealth*

- 1 : a nation, state, or other political unit: such as
 - a : one founded on law and united by compact or tacit agreement of the people for the common good

Thank You!



Elizabeth K. McCloud



elizabeth.mccloud@pheaa.org



717-720-1600



Pennsylvania Higher Education Assistance Agency