PA STATE GRANT & SPECIAL PROGRAMS

PENNSYLVANIA FOSTERING INDEPENDENCE TUITION WAIVER PROGRAM

PROGRAM OVERVIEW

April 2020
OBJECTIVE

Understand the program basics of the PA Fostering Independence Tuition Waiver (FosterEd) Program

PROGRAM BACKGROUND
Understand background for the Fostering Independence Tuition Waiver Program

ELIGIBILITY REQUIREMENTS
Explain the student and institutional eligibility requirements

POINT OF CONTACT
Examine the role of the Point of Contact (POC) for each institution

WAIVER CERTIFICATION
Review the waiver determination and certification processes

REMINDERS & RESOURCES
Recap program reminders and highlight additional resources available
PROGRAM BACKGROUND

• Enacted into law under Act 16 of 2019
  – Amended by Act 91 of 2019 to require students to apply for federal and state grants

• Program created to remove barriers in accessing postsecondary education for youth who are or have been in foster care
  – Provides a tuition and mandatory fee waiver for eligible students in the foster care system beginning Fall 2020
  – Assists students in completing studies, reducing student loan debt, and building a network of support
PROGRAM BACKGROUND

- Jointly administered by PHEAA and the PA departments of Education (PDE), Human Services (DHS), and Labor & Industry (L&I)

- No Commonwealth appropriation
  - Program is a waiver
  - Student’s tuition and mandatory fees must be eliminated or paid for by institutional funds

- Funds will not need repaid regardless of eligibility changes
INSTITUTION PARTICIPATION

• No institution application required for participation
  – Legislation provides details surrounding participation
  – Questions regarding your institution’s participation should be directed to your Legal Department

• Institutions must:
  – Be located in Pennsylvania
  – Have federal Title IV eligibility
  – Have an executed PHEAA Remote Access Agreement (RAA) on file
**Option 1**

- **Application**
  - Student applies/renews Chafee ETG eligibility directly with PHEAA

- **Confirmation**
  - PHEAA runs eligibility checks and advises the student

- **Waiver Listing Generated**
  - Eligible students presented on a biweekly Waiver Listing

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**Option 2**

- **Application**
  - Student self-identifies to school’s Point of Contact

- **Verification**
  - Student & school verify student’s eligibility and advise PHEAA
  - Student applies/renews Chafee ETG eligibility

- **Confirmation**
  - PHEAA runs eligibility checks and advises the student

- **Waiver Listing Generated**
  - Eligible students presented on a biweekly Waiver Listing
STUDENT ELIGIBILITY

• Student must be:
  – A resident of Pennsylvania
  – A recipient of a high school diploma or Commonwealth Secondary School Diploma
  – Under the age of 26
  – Eligible for services under Pennsylvania’s John H. Chafee Foster Care Program for Successful Transition to Adulthood
  – Identified as a youth in foster care or a youth discharged or adopted from foster care on or after attaining age 16
    • Or be a youth that has exited foster care on or after age 16 due to adoption or permanent legal guardianship
STUDENT ELIGIBILITY

• Student must:
  – File a FAFSA® for the award year coinciding with the waiver request (e.g., 2020-21 FAFSA for 2020-21 Award Year)
  – File an application for the PA Chafee Education and Training Grant (Chafee ETG) Program
    • Chafee ETG application not required for renewal applicants
    • Student does not have to be awarded Chafee ETG funds
  – Have “unmet costs” for the Chafee ETG Program as determined by the postsecondary institution
    • “Unmet costs” is the difference between the student’s cost of attendance and all other gift aid the student is receiving
STUDENT ELIGIBILITY

• Student must:
  – Enroll on at least a half-time basis
  – Be enrolled as an undergraduate student at an eligible PA institution
  – Maintain Satisfactory Academic Progress, as determined by the institution
  – Not be in default on a federal student loan or owe a refund on other Title IV aid
  – Have not previously received a waiver for five (5) years, consecutive or not (defined as 10 semesters or the equivalent)
• Each institution must identify one or more staff to serve as the Point of Contact (POC)

• POC is primary contact for eligible FosterEd students
  – Assist students in attaining FosterEd eligibility and financial aid
  – Provide students with information/referrals for on-campus and off-campus resources (e.g., tutoring, mental health, medical insurance, transitional housing, etc.)

• Institution determines who will fill the role

• Contact information for POC must be publicly available and posted online
  – Provide POC contact information to PHEAA
POINT OF CONTACT

• POC must assist students in obtaining verification of foster care status if student self-identifies
  – Verification will come from Commonwealth courts, County Children and Youth Agencies (CCYA), private provider agencies, or the student’s legal representative
  – No other sources of verification will be accepted

• Document verification source, date, and method in institutional records
  – Verification methods should be documented regardless of approval or denial

• Report approved eligibility verifications to PHEAA via email
POINT OF CONTACT

• POC will also assist student in accessing Federal, State, and other financial aid resources
  – Students not required to apply for PA State Grant if attending a non-approved institution or enrolled in a non-approved program of study
  – Resources to support students in applying for additional financial aid are available on PHEAA.org

Reminder: Some sources of financial aid (e.g., PA Chafee ETG, PA State Grant, etc.) can be used for various costs of attendance (e.g., room, board, transportation, books, supplies, etc.).
STUDENT ELIGIBILITY

• **Scenario:**
  – Raymond R. and Liz K. are enrolled at PHEAA College of the Arts, a Title IV eligible institution.
  – Raymond, an 18-year old freshman, has never received a Chafee ETG award and heard about the program from a friend.
  – Liz, a 25-year old junior, most recently had a Chafee ETG award in 2018-19. The school is aware of her prior eligibility.
  – Liz and Raymond reach out to Harold C., the POC for PHEAA College, at the start of the Fall 2020 term to inquire about the FosterEd Program.

• **Questions:**
  – What is the first thing Harold should do to begin assisting Raymond?
  – How can Harold assist Liz in establishing FosterEd eligibility?
• Answers:

– To assist:

• **Raymond**: As a first-time applicant, Raymond’s eligibility must be established by outreaching to external sources (e.g., CCYA, etc.). Once eligibility is verified, this should be routed to PHEAA and the POC should ensure he has submitted a Chafee ETG Application and FAFSA. Harold would also initiate discussion on additional support Raymond may need (e.g., other financial aid, tutoring, etc.)

• **Liz**: Harold should advise Liz to submit a Chafee ETG Application and FAFSA and then discuss the additional support services she may need.
  
  – Although Liz has prior Chafee ETG eligibility, her last award was the 2018-19 Academic Year so she would not be considered a renewal and must submit a new application.
WAIVER CERTIFICATION

- FosterEd waiver covers remaining balance of the student’s tuition and mandatory fees
  - Applicable after all gift aid applied (e.g., federal grants, state grants, outside scholarships, etc.)
  - Mandatory fees are those assessed to all students at the beginning of the term or fees associated with credential completion
    - Examples: health services fee, technology fee, student activity fee, laboratory fee, uniform fee, materials fee, etc.
  - Other charges (e.g., room, board, non-mandatory fees, etc.) are excluded and may be the student’s responsibility
WAIVER CERTIFICATION

PHEAA
• Initial eligibility checks performed by PHEAA
  – Example: FAFSA status, PA residency, age requirements, default status, etc.
• Students notified of eligibility determination via letter
• Eligible students move forward for school certification on Waiver Listing
  – Ineligible students added to Denial Listing

Schools
• Institution checks occur after PHEAA assesses eligibility
• Schools review Waiver Listing to confirm enrollment status, waiver amount, Satisfactory Academic Progress, etc.
• POC should:
  – Review Denial Listing and work with students to resolve eligibility issues
  – Assist students in identifying further financial aid, where needed
WAIVER CERTIFICATION

• Certify eligibility within 30 days of student appearing on Waiver Listing or 30 days of the term beginning, whichever is later

• After eligibility certification, institutions will:
  – Waive/apply credit for tuition and mandatory fees remaining after gift aid is applied
    • Waivers must be applied on a term-by-term basis
    • Waivers cannot be withheld or reduced due to optional gift aid
  – Refund any student payments on the student’s account that were applied to tuition or mandatory fees within 30 days

• Document terms when a student elects to decline the waiver
WAIVER CERTIFICATION

• Return Waiver Listings to PHEAA after eligibility is verified
  – Only return subsequent listings to report status changes or to verify eligibility for new students

• Report eligibility changes and ineligible students to PHEAA
  – Student withdrawals or drops to less than half-time before eligibility is certified, are ineligible
  – Student withdrawals or drops to less than half-time after eligibility is certified, retain waiver

• Waiver adjustments may be required due to financial aid increases or decreases
Dembe, a student at PHEAA College of the Arts, is listed on the Fall 2020 Waiver Listing. His cost of attendance information is:

### Costs

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Tuition</td>
<td>$17,000</td>
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<tr>
<td>Mandatory Fees</td>
<td>$1,000</td>
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<tr>
<td>Room &amp; Board</td>
<td>$0</td>
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<tr>
<td><strong>Total Costs</strong></td>
<td><strong>$18,000</strong></td>
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### Gift Aid

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<th>Item</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Federal Pell Grant</td>
<td>$3,000</td>
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<tr>
<td>PA State Grant</td>
<td>$2,000</td>
</tr>
<tr>
<td>PA Chafee ETG</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Resources</strong></td>
<td><strong>$5,000</strong></td>
</tr>
</tbody>
</table>

- The minimum amount the institution must waive is $13,000.
  - Eligible costs ($18,000) minus gift aid ($5,000) leave $13,000 uncovered.
- The school may opt to waive a higher amount however and allow Dembe’s gift aid to be applied towards other expenses (e.g., books, supplies, transportation, etc.).
Aram, a student at PHEAA College of the Arts, is listed on the Fall 2020 Waiver Listing. His cost of attendance information is:

- The minimum amount the institution must waive is $1,000.
  - Eligible costs ($6,500) minus gift aid ($5,500) leave $1,000 uncovered.
- The institution may elect to waive a higher amount and allow Aram to reserve his gift aid (e.g., PA Chafee ETG award) for other expenses (e.g., room, board, etc.).

<table>
<thead>
<tr>
<th>Costs</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>$6,000</td>
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<tr>
<td>Mandatory Fees</td>
<td>$500</td>
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<tr>
<td>Room &amp; Board</td>
<td>$3,000</td>
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<tr>
<td><strong>Total Costs</strong></td>
<td><strong>$9,500</strong></td>
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<td>PA Chafee ETG</td>
<td>$2,500</td>
</tr>
<tr>
<td><strong>Total Resources</strong></td>
<td><strong>$5,500</strong></td>
</tr>
</tbody>
</table>
REPORTING

• Reconciliation Listing must be submitted to PHEAA at the end of the award year

• Year-end annual report due to PDE by March 1, 2021
  – Legislatively required for institutions to report directly to PDE
  – Report focuses on student eligibility information, retention, and recommendations from the institution about the program
WHAT’S NEXT?

• 2020-21 Academic Year Chafee ETG Student Application now available on PHEAA.org/Chafee

• FosterEd and Chafee ETG eligibility processes will begin running in mid-May

• Waiver Listings begin generating to institution’s PageCenter mailboxes by mid-May

• FosterEd Program Guidelines and program FAQ available by early June
REMINDERS

• Eligibility begins with 2020-21 Award Year
• Ensure your institution has a designated and published POC
  – [Update this information](#) with PHEAA
• Waivers must be applied to tuition and mandatory fees
  – School choice if additional charges will also be waived
• Retain all records used in certifying and crediting student waiver eligibility for five (5) years
  – Program will be included in Program Reviews conducted by PHEAA staff
RESOURCES

• PAFosterCare.org
  – Features POC directories

• PA DHS Provider Directory
  – Contains a list of County Children and Youth Agencies

• Education Planner
  – Provides advice to help students prepare for college and a career

• StudentAid.ed.gov
  – U.S. Department of Education’s site providing information on preparing and funding education
• Web Resources:
  – PHEAA.org
    • Funding Opportunities
    • Partner Access
    • Online Order System.... and more!
  – Alec
    • Document Library
    • PageCenter

• Other Resources:
  – Contact Us:
    • Phone: 1-800-443-0646
    • Email: FosterEd@pheaa.org
Pennsylvania State Grant Program (PA SG)
Performing Satisfactory Academic Progress Reviews
Tuesday, May 12, 2020
10:00-11:30 AM (ET)

Military Family Education Program (MFEP)
Program Overview
Tuesday June 2, 2020
2:00-3:30 PM (ET)

Spring 2020 series registration and session descriptions available on PHEAA.org/SGSPtraining

Have a specific session that you would like to see featured?
Send us an email via the program mailbox with the subject line: Training Topic.