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MISSISSIPPI POST-SECONDARY EDUCATION FINANCIAL ASSISTANCE BOARD



IHL Executive Offices, Room 218
3825 Ridgewood Road, Jackson, MS 39211

September 18, 2023, at 2:00 p.m.

Teleconference: 1-888-822-7517, Access code: 2791682#

Zoom: <https://itsmsgov.zoom.us/j/88972500616>

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BE IT REMEMBERED, that the Mississippi Postsecondary Education Financial Assistance Board held a regular meeting on Monday, September 18, 2023 at 2:00 p.m. Members of the Board participated in the meeting remotely via Zoom or teleconference. Members of the media and public were invited to attend the meeting in Room 218 of the Education and Research Center, 3825 Ridgewood Road, Jackson, Mississippi, 39211.

The following member(s) participated remotely:

- Ben Burnett, MAICU institutional appointee
- Barney Daly, Lt. Governor's appointee
- Jason Dean, MAICU association appointee
- Tyrone Jackson, MCCB institutional appointee
- Mark Keenum, IHL institutional appointee
- Jim Turcotte, Governor's appointee and Chairman
- Dianne Watson, MCCB Board appointee

The following member(s) did not participate:

- Steven Cunningham, IHL Board appointee

Also in attendance either in person or remotely were:

- Jennifer Rogers, Director of Student Financial Aid and Postsecondary Board Director
- Tiffany Allen-Barner, Office and Program Assistant, Student Financial Aid
- Meg Harris, Assistant Director of Operations, Student Financial Aid
- Adele Russell, Student Service Representative, Student Financial Aid
- Frances West, Program Administrator, Student Financial Aid
- Casey Prestwood, Associate Commissioner for Academic and Student Affairs, IHL
- Melissa Temple, Director of Nursing, IHL
- Terry Bland, Postsecondary Board Advisory Committee, Itawamba Community College

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- Laura Diven-Brown, Postsecondary Board Advisory Committee, University of Mississippi
- Nicole Patrick, Postsecondary Board Advisory Committee, Mississippi University for Women
- David Williamson, Postsecondary Board Advisory Committee, University of Southern Mississippi
- Heather Dearman, President of MASFAA, Mississippi Gulf Coast Community College
- Toren Ballard, Director of K-12 Policy, Mississippi First
- Grace Breazeale, K-12 Policy Associate, Mississippi First
- Rebecca Cockrell, Bower Foundation
- Molly Minta, Mississippi Today

The meeting was called to order at 2:00 p.m. by Chairman Turcotte.

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On motion by Tyrone Jackson and seconded by Diane Watson, all Board Members legally present and participating voted unanimously to approve the minutes of the board meeting held on June 22, 2023, as originally drafted.

ITEMS FOR CONSIDERATION

Item 1: Jennifer Rogers presented a request to approve updates to the FAITH Scholarship Rules and Regulations to clarify the initial requirements for continuing college students. On motion by Barney Daly, seconded by Ben Burnett, all Board Members legally present and participating voted unanimously to approve the request.

1. Approve Updates to APA Part 623: FAITH Scholarship Rules and Regulations to Clarify Initial Requirements for Continuing College Students

Summary:

The 2022 Legislature created the State Representative Bill Kinkade Fostering Access and Inspiring True Hope (FAITH) Scholarship to provide scholarships up to the full Cost of Attendance for students who have interacted with the state's foster care system. The Board approved the Rules for the FAITH Scholarship in September 2022. SFA is making awards for the first time for the 2023-24 aid year.

The approved rules address the renewal academic eligibility requirements of continuing college students but not the initial academic eligibility requirements of continuing students. This first year, many first-time FAITH applicants and recipients are continuing college students.

Renewal recipients must maintain a 2.0 GPA and meet the institution's satisfactory academic progress (SAP) requirements. The proposed amendment clarifies that initial recipients who are continuing college students must not be on financial aid suspension for failure to meet the institution's SAP requirements. The amendments further clarify the student should complete the institution's SAP appeal process if necessary.

Request:

SFA requests approval of the following updates to APA Part 623: State Representative Bill Kinkade Fostering Access and Inspiring True Hope (FAITH) Scholarship Rules and Regulations.

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Title 10: Education Institutions and Agencies
Part 623: State Representative Bill Kinkade Fostering Access and Inspiring True Hope
(FAITH) Scholarship Rules and Regulations

II. APPLICATION REQUIREMENTS

A. First-time applicants must:

~~4.6.~~ If a continuing college student, the recipient must not be on financial aid suspension for failure to meet the attending institution's satisfactory academic progress (SAP) requirements.

B. Renewal Applicants Must:

5. Make satisfactory academic progress toward the completion of a certificate or degree with a minimum cumulative GPA of 2.0 on a 4.0 scale, as certified by the registrar, based on ~~that the~~ attending institution's calculation at the end of each semester, trimester, or term for which the applicant is enrolled.

IV. LOSS OF ELIGIBILITY

B. Placement on financial aid suspension due to failure to meet the attending institution's SAP requirements, make Satisfactory Academic Progress toward a certificate or degree will result in cancellation of the recipient's eligibility for the FAITH Scholarship; however, the student may file an appeal for reconsideration with the Mississippi Office of Student Financial Aid and may be granted an exception for cause. Students should follow the attending institution's SAP appeal process to re-establish eligibility.

Source: *Miss. Code Ann.* § 37-106-75.

The full rules are included as Exhibit 1 on page 49.

Recommendation:

Board staff recommends approval of this item, contingent upon completion of the Administrative Procedures Act process.

Item 2: Jennifer Rogers presented a request to approve updates to the SREB Regional Contract Forgivable Loan Program Rules and Regulations to change the application deadlines. On motion by Diane Watson, seconded by Barney Daly, all Board Members legally present and participating voted unanimously to approve the request.

2. **Approve Updates to APA Part 674: SREB Regional Contract Forgivable Loan Rules and Regulations to Change the Application Deadlines**

Summary:

Mississippi has participated in the SREB Regional Contract Program for Optometry for many years. The annual SFA appropriation bill includes a line-item appropriation for nine new students and all eligible renewal students each year. Students receive the loan while in school and may

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repay the loan by working in Mississippi after their residency and licensure for one year for each year of loan.

The program rules require students to complete the online application by March 30 each year and submit supporting documents by June 30 each year. These application dates are not practical. Program participants are selected by the out-of-state institution, and sometimes the institution does not notify the participant of their selection status in time for the student to meet the deadline.

The proposed update extends the application deadline to September 15 and the document deadline to October 15.

Request:

SFA requests approval of the following updates to APA Part 674: SREB Regional Contract Forgivable Loan Rules and Regulations.

Title 10: Education Institutions and Agencies
Part 674: SREB Regional Contract Forgivable Loan Program (SREB) Rules and Regulations

II. APPLICATION REQUIREMENTS FOR FORGIVABLE LOAN APPLICANT

A. First time applicants must:

1. Complete an application online at www.msfinancialaid.org by the deadline date of ~~March 31~~September 15.
2. If residency has not been established, submit two forms of documentation of current legal residency by the document deadline of ~~April June 30~~October 15. Acceptable forms of residency documentation are listed in the General Administration Rules and Regulations and published online at www.msfinancialaid.org.
3. Submit an official academic transcript or electronic grade verification from the school/college/university last attended by the document deadline of ~~June 30~~October 15. The transcript or grade verification must report grades from all postsecondary institutions attended.
4. Submit to the Board an official letter of acceptance from the accredited school of optometry, showing date admitted and entering classification by the document deadline of ~~June 30~~October 15.

B. Renewal applicants must:

1. Complete an application online at www.msfinancialaid.org by the deadline date of ~~March 31~~September 15.

Source: *Miss. Code Ann.* § 37-106-47.

The full rules are included in Exhibit 2 on page 53.

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Recommendation:

Board staff recommends approval of this item, contingent upon completion of the Administrative Procedures Act process.

Item 3: Jennifer Rogers presented a request to approve updates to the Nurse Retention Loan Repayment Program Rules and Regulations to change the application cycles and deadlines. On motion by Barney Daly, seconded by Mark Keenum, all Board Members legally present and participating voted unanimously to approve the request.

3. **Approve Updates to APA Part 687: Nurse Retention Loan Repayment Program Rules and Regulations to Change the Application Cycles and Deadlines**

Summary:

The Nurse Retention Loan Repayment Program (NULR) was created by the 2023 Legislature to provide loan repayment for early career nurses who work in a Mississippi hospital or skilled nursing home. The Board approved the rules for the program in June 2023. Shortly after obtaining Board approval for the rules, SFA learned that all program activities must first be authorized by HORNE, the agent hired by the Mississippi Department of Finance and Administration to manage the state's administration of all federal American Rescue Plan Act (ARPA) funds, including the Coronavirus State and Local Fiscal Relief Funds, which the Legislature used to fund NULR.

SFA was required to meet with HORNE weekly over the summer, submit an Initiative Overview, draft Standard Operating Procedures, and receive additional approval of the NULR Rules and Regulations. After obtaining approval from HORNE, SFA entered a subrecipient agreement with DFA to obtain the funds. The program rules are incorporated into the Subrecipient Agreement as an exhibit. Therefore, any changes to the program must first be approved by DFA by amendment to the Subrecipient Agreement.

The following change was presented to DFA and accepted. Nurses must be licensed and working for a full year before they can qualify for a year of loan repayment. Considering that, we originally set up the application periods to align with the fiscal years, so the deadline for each application cycle would be on June 30 for any nurse applicant who started working on or after the previous July 1. When we launched the program and started hearing from applicants, we realized that most nurses who graduate in May obtain licensure in July. According to the original application cycle dates, nearly all May 2023 nursing graduates would need to wait until October 1, 2024 to apply and would only be eligible to apply for a max of two years of funding. DFA approved our request to extend the application cycles beginning with the second cycle that opens October 1, 2023 to allow for nurses who started working through September 30 of a given year. By making this change, May 2023 graduates who earned licensure and started working this summer will be able to complete the application that opens October 1 and potentially receive the maximum three awards.

Request:

SFA requests approval of the following updates to APA Part 687: Nurse Retention Loan Repayment Rules and Regulations.

Title 10: Education Institutions and Agencies
Part 687: Nurse Retention Loan Repayment Program (NULR) Rules and Regulations

II. APPLICATION REQUIREMENTS FOR LOAN REPAYMENT APPLICANT

A. First time applicants must:

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1. Complete the Mississippi Aid Application (MAAPP) online at www.msfinancialaid.org by the deadline date of ~~June 30~~September 15 of the nurse's first year of nursing. ~~The deadline for applications submitted the inaugural year will be extended to September 15, 2023.~~
2. Submit the following documents to the Board by ~~July 31~~October 15 of the nurse's first year of nursing. ~~The deadline for the following documents to be submitted for the inaugural year will be extended to October 15, 2023.~~

B. Renewal applicants must:

1. Complete the Mississippi Aid Application (MAAPP) online at www.msfinancialaid.org by the deadline date of ~~June 30~~September 15.
2. Submit the following documents to the Board by ~~July 31~~October 15.

Source: ~~Miss. Code Ann. § 37-106 XXSB 2373, 2023 Legislative Session-~~

The full rules are included in Exhibit 3 on page 63.

Recommendation:

Board staff recommends approval of this item, contingent upon completion of the Administrative Procedures Act process.

Item 4A: Jennifer Rogers presented two legislative requests to the Board for approval. The first request was to ask the Legislature to update the HELP Grant code section to remove the curriculum requirement, align the requirements with the federal rules related to family size; and to remove outdated language. The Board discussed the possible cost of these changes. On motion by Mark Keenum and seconded by Barney Daly, all Board Members legally present and participating voted unanimously to approve the request to seek legislative support for the changes, contingent upon the emergence of other legislation related to the redesign of state aid and upon the overall appropriations outlook for higher education. Rogers will keep the Board updated on continuing conversations.

4. Approve Legislative Requests for 2024 Legislative Session

- A. **Amend HELP Grant to Remove the Curriculum Requirement; Align Grant Requirements with Federal Rules Related to Family Size and Determination of Need; and Remove Outdated Language**

Purpose:

Remove the HELP core curriculum requirement, align the requirements related to the definition of family and determination of need with the federal rules, and remove outdated language.

Reason for Request:

1. Remove the curriculum requirement that appears in Section 1(3)(c). The HELP Grant requires students to complete a high school curriculum that is equal to the IHL Required College Prep Curriculum. Students must also have a minimum score of 20

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on the ACT and a 2.5 or higher high school GPA. For the 23-24 aid year, 98.1% of HELP Grant applicants were certified by their counselors as having completed the HELP Core Curriculum. The curriculum is a requirement for graduation at many high schools. It is also required for admission to all IHL institutions. Therefore, the curriculum requirement does not serve as a meaningful indicator of merit to separate students who are “college-ready” and therefore worthy of receiving the HELP Grant from those who are not. Under the current rules, a high school counselor must certify completion of the HELP curriculum for each HELP Grant applicant. The student information systems used by the schools do not have the capacity to evaluate a student’s transcript and determine whether the curriculum meets the requirements or not. Therefore, the high school counselors must complete the transcript review and curriculum certification process for each student individually and manually. This places a heavy administrative burden on counselors, many of whom are already serving far more students than is recommended and have many other responsibilities beyond college advising. Although it does not happen frequently, some students miss out on the HELP Grant because their high school counselor does not provide the required curriculum certification.

2. Align the requirements related to the definition of family and determination of need with the federal rules in Section 1(7). Currently, the law defines financial need as having an adjusted gross income below a given threshold, but the income can be higher if the family has more children. The income is derived from the FAFSA, but the family size is defined by the number of children under 21, which is not the same definition for determining the family size that appears on the FAFSA. Therefore, SFA must ask each applicant to complete a Household Size Verification Worksheet as part of the application and we must derive the family size from that form and our own calculations. SFA often discovers discrepancies between what is submitted on the FAFSA and what is submitted on the form. When discrepancies occur, the student is required to submit additional documentation to resolve the discrepancy. This causes delays in the awarding process and places an additional application burden on the student. SFA also experiences a heightened administrative burden.
3. Remove outdated language in Section 1(4) and (6)(c). The ability to award the grant to an applicant who fails to meet the requirements by an amount of 10% or less has never been utilized and should be removed. There is no need for the language to establish a waiver of the curriculum requirement through the 1996-1997 academic year.

Suggested Legislation:

Suggested legislation is included in *Exhibit 4 on page 67*.

Fiscal Note:

The proposed changes could result in a modest increase in the cost of making awards. More students may be able to complete the application process because they are no longer dependent upon a counselor to submit curriculum information. The proposed changes will also result in a reduction of administrative costs at the school level and in SFA.

Recommendation:

Board staff recommends approval.

Item 4B: Jennifer Rogers presented two legislative requests to the Board for approval. The second request was to ask the Legislature to amend Section 37-106-36 of the Mississippi Code of 1972 to expand eligibility for the Winter-Reed Teacher Loan Repayment Program, remove the cap on the number of annual awards allowed under the program, and to continue the program. On motion by Mark Keenum and seconded by Jason Dean, all Board Members legally present

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and participating voted unanimously to approve the request to seek legislative support of the changes.

4. Approve Legislative Requests for 2024 Legislative Session

B. Amend Winter-Reed Teacher Loan Repayment Program to Expand Eligibility; Remove Cap on Annual Awards; and Continue Program

Purpose:

Expand eligibility to all teachers with loans and remove the cap on the number of annual awards allowed under the Winter-Reed Teacher Loan Repayment Program.

Reason for Request:

1. Expand eligibility beyond first-year teachers to all teachers. June marked the end of the second year of administration of Winter-Reed. Over the first two years, SFA has heard from many teachers with student loans who feel slighted, overlooked, or unappreciated because they cannot benefit from the program simply because they are no longer in their first year of teaching. The program should be expanded to serve all teachers, not just new teachers.
2. Remove the cap on the number of new awards. SFA has learned that limiting the number of recipients may result in money being forfeited. The current law states that a maximum of 150 new teachers may be awarded each year. SFA awarded all 150 potential recipients at the beginning of the first year, but not everyone submitted their completion paperwork at the end of the year. So, SFA ultimately paid only 136 new teachers. Also, some of the teachers were teaching in non-shortage areas and therefore received smaller awards. SFA could have awarded more than 150 teachers and still stayed within the established budget. Rather than controlling the program size with a quota of awards, the Legislature can control the program size with the annual appropriation.
3. Continue the program by removing the repeal date of July 1, 2024.

Suggested Legislation:

Suggested legislation is included in *Exhibit 5 on page 70*.

Fiscal Note:

The proposed change will not carry any additional cost. As written, the maximum annual cost of the program would be \$2.25 million. If the Legislature removes the quota and continues to fund the program at that level, SFA will adjust the annual number of new awards to ensure awards do not exceed available funds.

Recommendation:

Board staff recommends approval.

Item 5: Jennifer Rogers presented a revised state aid redesign proposal that emerged from the State Aid Redesign Task Force, initially convened in 2022 by the Woodward Hines Education Foundation. The Board discussed the proposal but took no action.

5. Discuss Revised State Aid Redesign Proposal

Summary:

The Woodward-Hines Education Foundation convened a State Aid Redesign Task Force in the summer of 2022. The task force proposed legislation to expand MTAG and change the award structure of HELP. The legislation did not pass in the 2023 Session. Conversations about state

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aid redesign have continued since the legislative session ended. A revised proposal has been crafted to address the objections raised last year.

Item 6: On motion by Mark Keenum, seconded by Barney Daly, all Board Members legally present and participating voted unanimously to select Dr. Jim Turcotte to continue as Chairperson for 2023-2024.

6. Selection of Chairperson for 2023-24

Summary:

According to APA Part 601, Chapter 2, Rule 2.1, Section III, the board shall elect from its membership a chairman. Dr. Jim Turcotte was elected as chairman in September 2022. The Board should elect a chairperson to serve during 2023-2024 academic/aid year. The rules allow a chairperson to serve consecutive terms.

Item 7: Jennifer Rogers presented updates and announcements. The Board remains short of one member as the Board awaits an appointment by Governor Reeves. Rogers will follow up with his office again. Rogers will circulate a Doodle Poll to Board members in November if the need arises for the Board to meet in December.

7. Updates and Announcements

ADDITIONAL AGENDA ITEMS IF NECESSARY

The Board did not consider any additional agenda items.

EXECUTIVE SESSION IF DETERMINED NECESSARY

The Board did not consider the need to enter Executive Session.

ADJOURNMENT

There being no further business to come before the Board, Dr. Turcotte called the meeting adjourned.



Director, Mississippi Postsecondary Education Financial
Assistance Board