

May 22, 2024 at 12:30 p.m.
Via Videoconference and PBS North Carolina Livestream
UNC System Office
223 S. West Street, Room 1809
Raleigh, North Carolina

AGENDA

OPEN SESSION

- A-1. Approval of the Minutes of January 24, 2023 Reginald Holley
- A-2. Navigating FAFSA Delays, Implementing New Student Access Initiatives.....Shun Robertson
Sharon Oliver, North Carolina Central University
Andrea Poole, North Carolina State Education Assistance Authority
Joseph Montgomery, North Carolina A&T State University
Farrah Ward, Elizabeth City State University
- A-3. Adjourn

DRAFT MINUTES

January 24, 2024 at 3:15 p.m.
Via Videoconference and PBS North Carolina Livestream
UNC System Office
223 S. West Street, 1809
Raleigh, North Carolina

This meeting of the Committee on Historically Minority-Serving Institutions was presided over by Chair Reginald Holley. The following committee members, constituting a quorum, were also present in person or by phone: Lee Barnes, Kellie Hunt Blue, Woody White, and Sonja Nichols.

Interim Chancellor Anthony Graham and PBS North Carolina CEO David Crabtree also participated.

Staff members present included Shun Robertson and others from the UNC System Office.

1. Call to Order and Approval of OPEN Session Minutes (Item A-1)

The chair called the meeting to order at 3:19 p.m. on Wednesday, January 24, 2024. The open session minutes from the January 18, 2023, meeting were approved by unanimous consent.

2. Positive Impacts of State Investments in Historically Minority-Serving Institutions (Item A-2)

Chair Holley began the roundtable discussion with a brief overview of the importance and impacts of the state's historically minority-serving institutions. Chair Holley then opened the floor to the HMSI chancellors to speak to their individual institutions' situation and experience with the state's investments they have received thus far.

There being no further business and without objection, the meeting adjourned at 4:35 p.m.

Kellie Hunt Blue, Secretary

AGENDA ITEM

- A-2. Navigating FAFSA Delays, Implementing New Student Access Initiatives.....Shun Robertson
Sharon Oliver, North Carolina Central University
Andrea Poole, North Carolina State Education Assistance Authority
Joseph Montgomery, North Carolina A&T State University
Farrah Ward, Elizabeth City State University

Situation:	Representatives from three UNC System institutions and the North Carolina State Education Assistance Authority (NCSEAA) will discuss the enrollment and fiscal impacts of this year's Free Application for Federal Student Aid (FAFSA) delays and new efforts to increase access to System institutions.
Background:	Late last year, the U.S. Department of Education released a new version of the FAFSA. The changes were made in an effort to simplify the form and allow more students to be eligible for financial aid. But due to a number of processing problems, students, families, and institutions have had to deal with major delays. While we face challenges for the 2024-25 academic year due to the FAFSA disruptions, the UNC System is implementing new initiatives that should increase student's access to our institutions.
Assessment:	In partnership with the North Carolina Department of Public Instruction and the North Carolina State Education Assistance Authority, the UNC System will implement a direct admissions pilot to increase awareness of and enrollment in postsecondary institutions and simplify the admissions process for qualified applicants. In addition, the new Next NC Scholarship that covers more than half, if not all, of tuition and fees to attend any UNC System institution should help improve access to UNC System institutions for most students with household incomes below \$80,000. The committee will hear more information about these initiatives from institutional and NCSEAA representatives. The additional materials will be available in hard copy on the day of the meeting and via BoardEffect at the conclusion of the meeting.
Action:	This item is for discussion only.



**THE UNIVERSITY OF
NORTH CAROLINA SYSTEM**

COMMITTEE ON HISTORICALLY MINORITY SERVING INSTITUTIONS

Navigating FAFSA Delays, Implementing New Student Access Initiatives

May 22, 2024

Impact on HBCU's/HMSI's

Student stories:

Rising Senior at the University of North Carolina at Pembroke:

- First Generation
- Incomplete application / Mailing option
- Relearn/Teach
- Undocumented parents/SSN
- UNCP Financial aid consulting is very helpful
- Winter Break drop prevented assistance/overflow of student requests

High School student matriculating to North Carolina A&T State University:

- Read and Translated for Guardians
- Difficulty with creating a login and email accounts
- Verification of parents and their information
- Delay in funding
- Limited assistance from school faculty
- Student community have all been impacted/similar stores



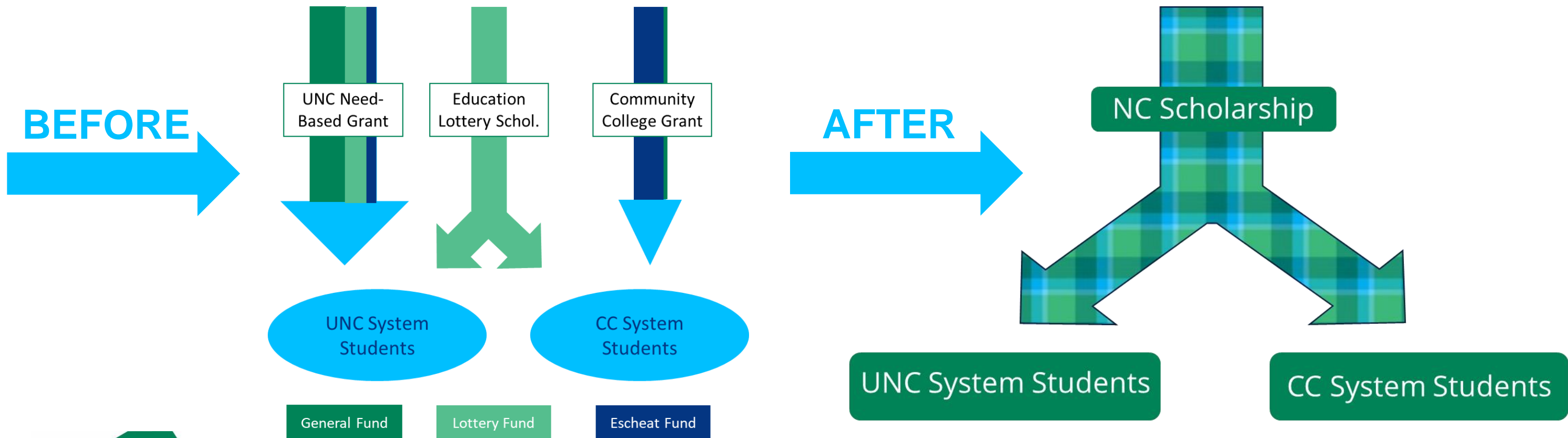
Next NC Scholarship and FAFSA Update

Presentation to UNC Board of Governors'
Committee on Historically Minority-Serving Institutions

May 2024

NC STUDENT AID STUDY GROUP RECOMMENDATION

- Consolidate state's three public need-based grants into one program
- Allows students and families to understand options and eligibility earlier
- Approved in 2021 State Budget



NEXT NC SCHOLARSHIP 2024-25



Most NC students with $\text{AGI} \leq \$80\text{K}$ will qualify for at least \$5K to attend a UNC institution and \$3K to attend a NC community college



File a FAFSA to apply

How it works:

- Combines federal Pell Grants and state funds to ensure students get at least the minimum awards of \$5,000 for UNC and \$3,000 for NCCCS
- Eligible students have $\text{AGI} \leq \$80,000$ and $\text{SAI (federal need calculation)} \leq \$7,500$
- More aid is available based on need

FAFSA DELAY AND IMPACTS

Launch of 2024-25 FAFSA delayed from Oct. to Jan.

- “Countdown to College” in October could not include a FAFSA completion push
- Students have 3 fewer months to complete the FAFSA

•Technical issues with FAFSA completion for students

- Students did not have the ability to correct their FAFSAs until late April
- Additionally, students with a parent without an SSN were not able to complete at all until March and have had inconsistent access since – full workaround not implemented until mid-May

•Student record data shared more than 6 months late

- Student records began to arrive in mid-March, but with problems
- Financial aid awards were delayed to students
- School counselors have reduced ability to help seniors complete the FAFSA
- Delayed completion data in FAFSA Tracker

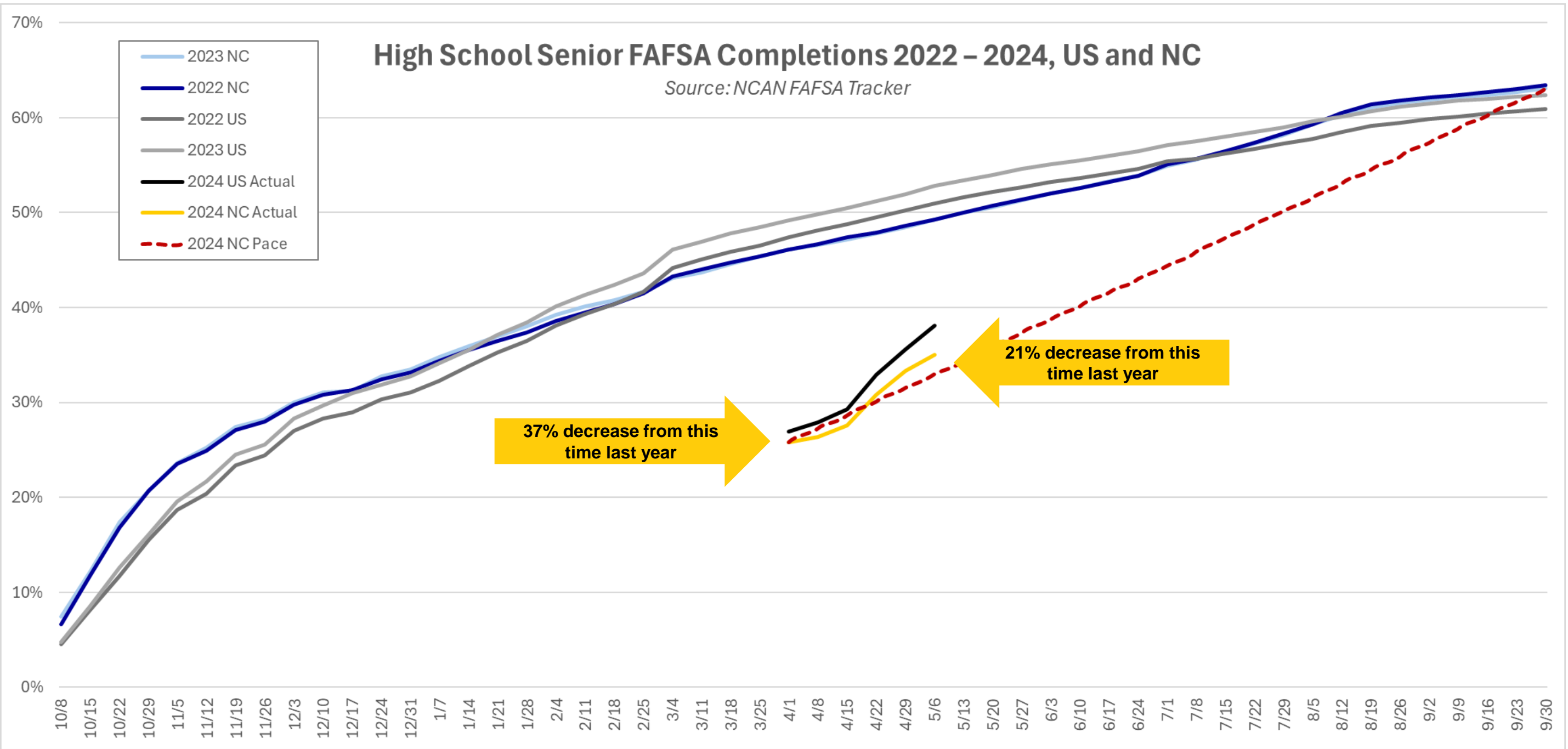
•Student record data initially incorrect

- Some records were initially missing asset data for dependent students leading to an incorrect SAI
- Some records initially had incorrect tax information included leading to an incorrect SAI

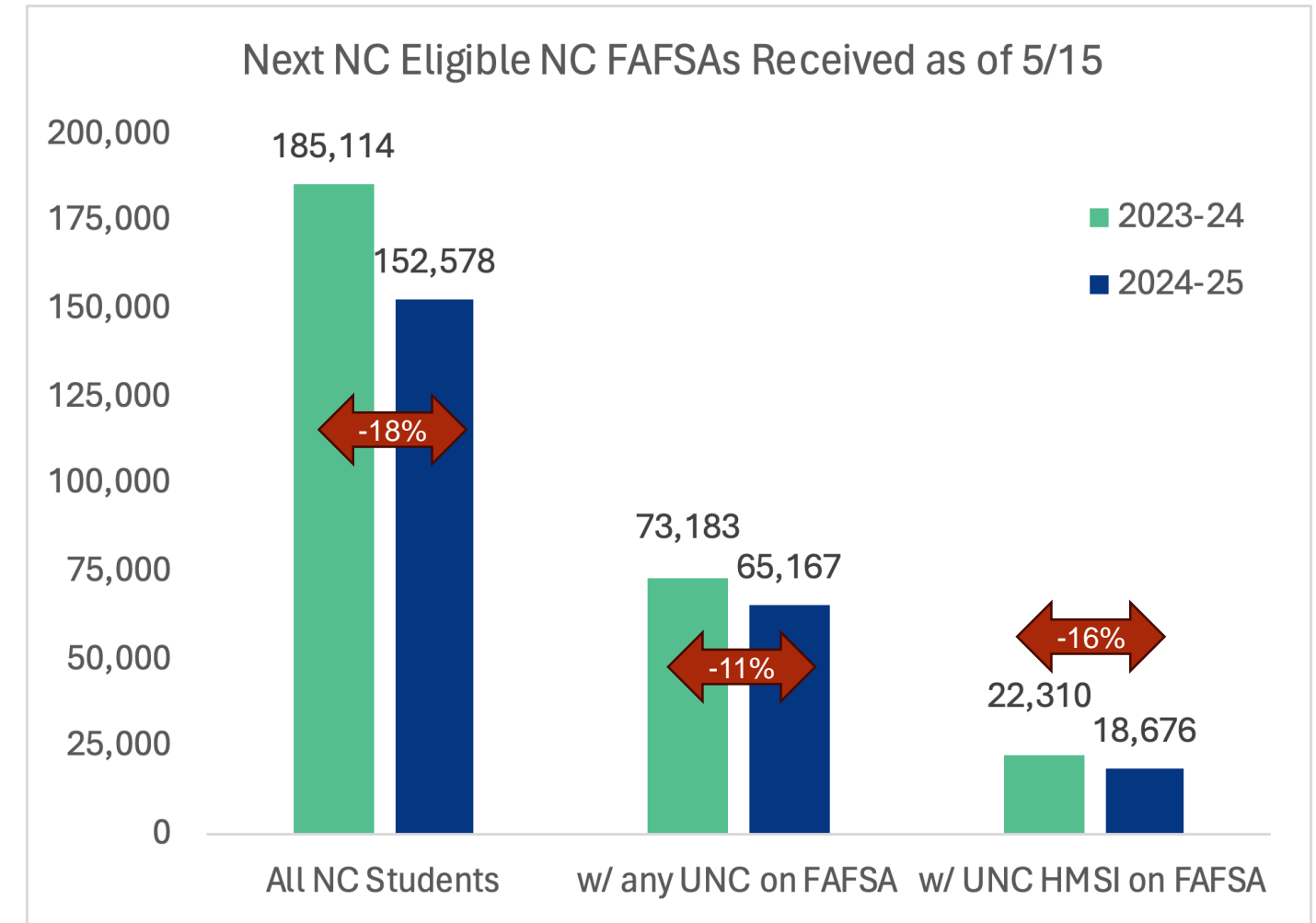
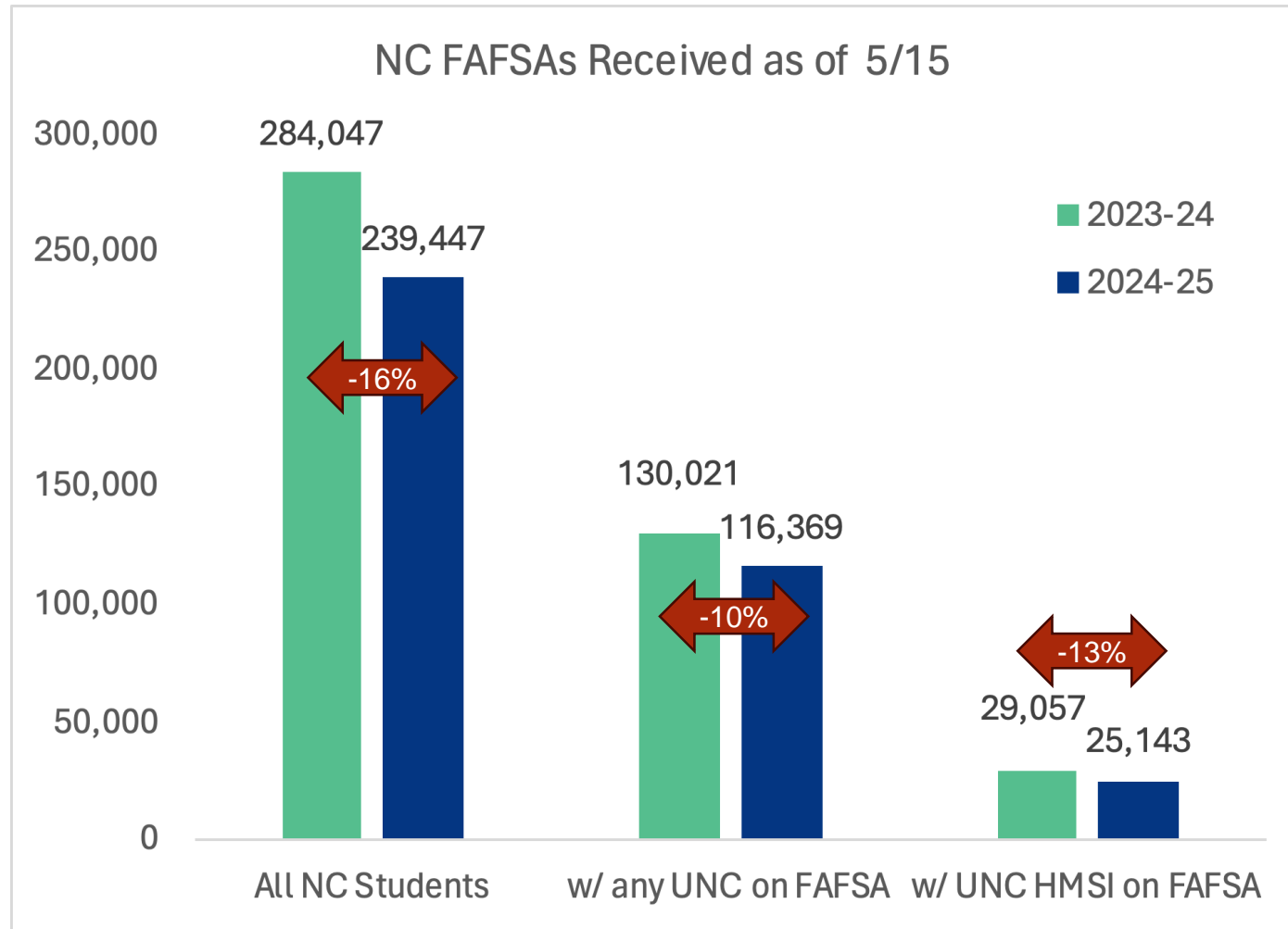
Signs of improvement

- Nonprofit partners regained access to data on 4/30
- HS completions are increasing
- Needed corrections are getting resolved

NC FAFSA COMPLETIONS: How are we doing?

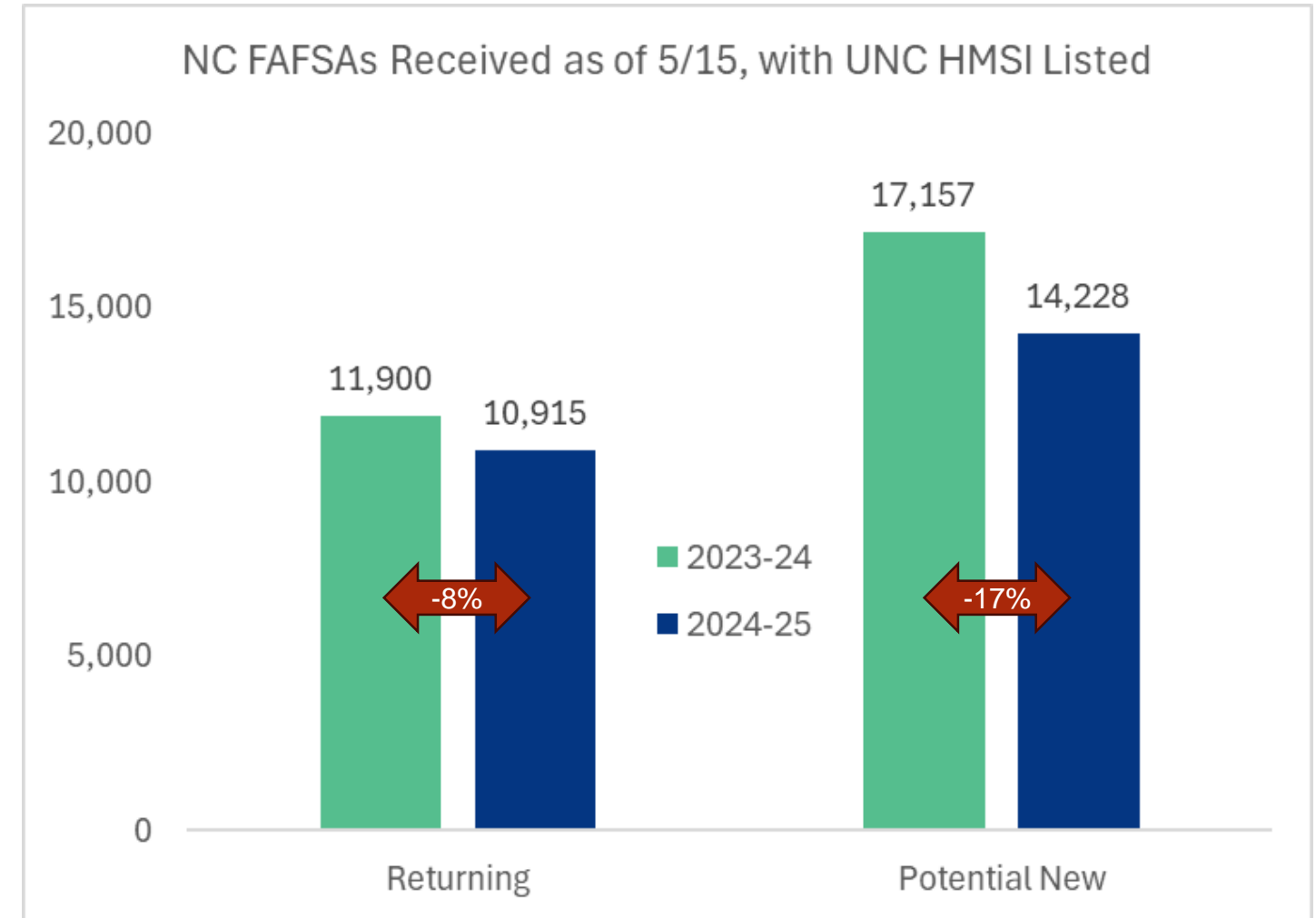
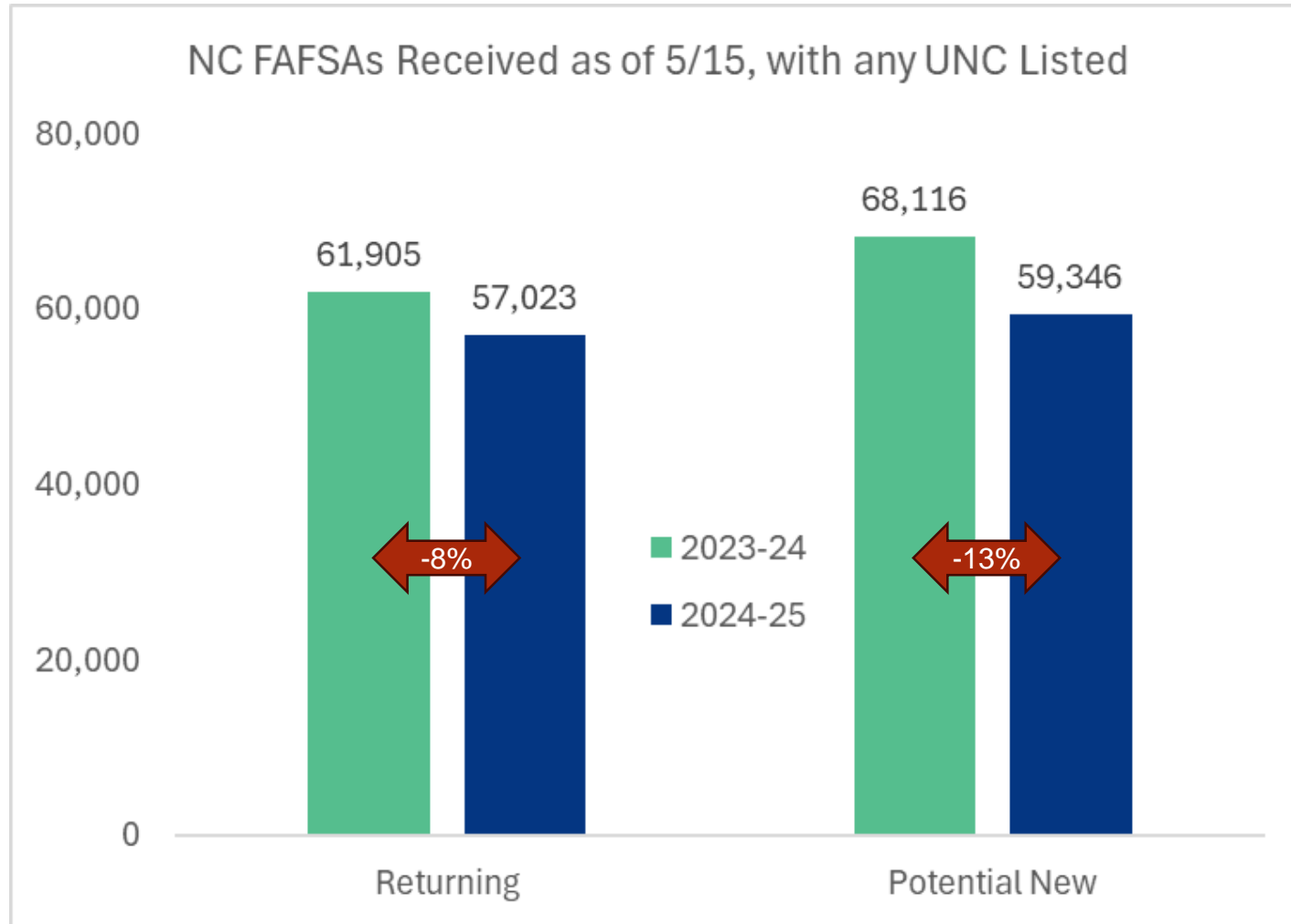


NC FAFSAS RECEIVED : How are we doing?



Note: Includes ISIRs received as of May 15 for 2023-24 and 2024-25 FAFSA for students with an NC address and no prior bachelor's degree. "w/ any UNC on FAFSA" and "w/UNC HMSI on FAFSA" include students that listed any UNC institution or specifically a UNC HMSI in their first three schools selected on the FAFSA. "Next NC Eligible" is an estimate based on EFC or SAI at or below 7,500.

NC FAFSAS RECEIVED: UNC Students



Note: Includes ISIRs received as of May 15 for 2023-24 and 2024-25 FAFSA for students with an NC address and no prior bachelor's degree. "w/ any UNC on FAFSA" and "w/UNC HMSI on FAFSA" include students that listed any UNC institution or specifically a UNC HMSI in their first three schools selected on the FAFSA. "Returning" includes students that were enrolled in a UNC institution the preceding fall. "Potential new" includes students that were not enrolled in a UNC institution in the preceding fall.

FAFSA DELAY AND IMPACTS: RESPONSE TO DATE

- ✓ Research-based Next NC Scholarship public awareness campaign focuses on FAFSA completion
- ✓ Created [NC FAFSA Hub](#) with FAFSA resources for education professionals
- ✓ Statewide FAFSA Day in January with over 60 institutions and 1,500 students participating
- ✓ “How to Pay for College” webinars during Financial Aid Awareness Month in February
- ✓ Updated [NC FAFSA Tracker](#), which shows state, district, and school-level FAFSA completion information

NEXT NC TOOLKIT: www.nextncscholarship.org/toolkit/




Next NC Scholarship Toolkit & User Guide



Next NC Scholarship Toolkit

Includes all the resources and materials you need to share about the Next NC Scholarship with your network – around campus or in your community, on social media, during info sessions and more!


[Click Here to Download](#)



Next NC Scholarship User Guide

Looking for tips on how to best use the toolkit resources? This guide is filled with suggested Next NC Scholarship language and best practices that will help you make the most of the toolkit!

[Click Here to Download](#)



COLLEGE JUST GOT WAY MORE AFFORDABLE FOR MANY NORTH CAROLINIANS

The *Next NC Scholarship* is a financial aid program that helps most North Carolinians from households making \$80,000 or less pursue a higher education, by fully covering tuition and fees at any community college or more than half, if not all, of tuition and fees to attend any public university in the state. The best part? It's money that doesn't have to be repaid.

It combines the federal Pell Grant with the state-funded financial aid program to form a simplified and predictable scholarship award that is easier to understand and makes education more affordable so a greater number of North Carolinians can pursue a degree.

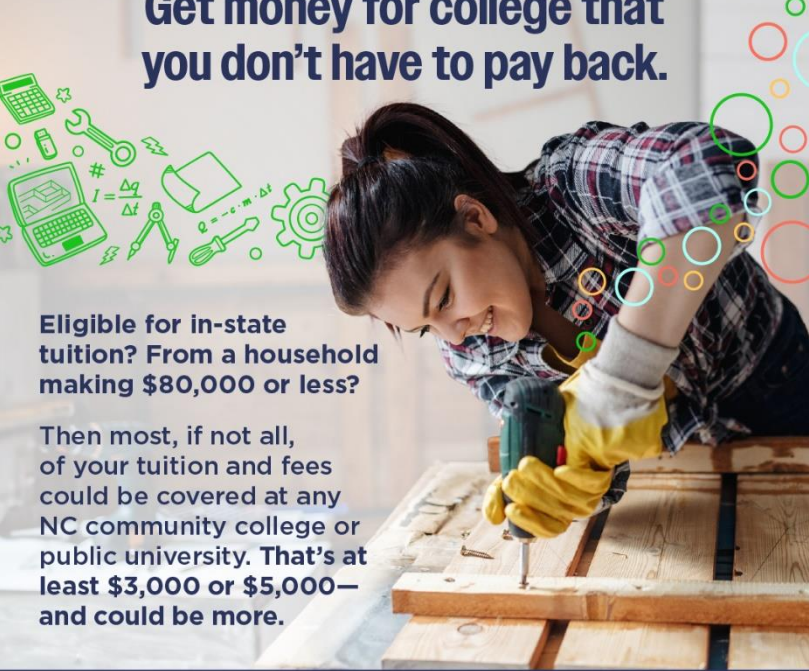
To receive the *Next NC Scholarship*, you must be:

- 1 A North Carolina resident who is eligible for in-state tuition
- 2 A high school graduate (high school equivalency completers are eligible)
- 3 From a household with an annual Adjusted Gross Income (AGI) of \$80,000 or less
- 4 Enrolled in an eligible undergraduate curriculum program for the 2024-2025

Get money for college that you don't have to pay back.

Eligible for in-state tuition? From a household making \$80,000 or less?

Then most, if not all, of your tuition and fees could be covered at any NC community college or public university. That's at least \$3,000 or \$5,000—and could be more.




credit hours per semester students will receive (award)

factory Academic standards of the school you

s completed the 2024-2025 resulting Student or below 7,500 (once financial aid office at the or you plan to attend and confirm eligibility)

where you're going.
nextncscholarship.org



Know what you're getting. Know where you're going.

WHAT'S NEXT

- ✓ Working with partners to develop a FAFSA completion campaign in late spring and summer
- ✓ Working with UNC and NCCCS institutions to continue promoting Next NC to potential students
- ✓ Working with communications departments to help make financial aid clearer on college websites



HMSI Committee

Farrah J. Ward, Provost and Vice Chancellor for Academic Affairs

May 22, 2024

FAFSA Delays

- ECSU sent 1st packages to students on April 29, 2024
- Packaging for continuing students was delayed by nearly 2 months
- Substantial increase in the number of FAFSA corrections required
- Verification selection delayed

FAFSA Outreach to New Students

- Increased communications to students via texts, emails, and social media
- On-Campus Events (Open House, Guidance Counselors)
- Off-Campus Events (FAFSA nights in local high schools, at church events, and other community gatherings)
- Virtual FAFSA nights
- Distributed personalized financial videos to new students

FAFSA Outreach to Continuing Students

- FAFSA signs with QR code throughout campus
- FAFSA videos from Chancellor on TV monitors around campus
- Hosted FAFSA completion events on campus, including inside residence halls. Targeted groups such as Honors, Athletics, Band, Choir, etc.
- Employed remote financial aid advisor (funded by Education Advancement). Advisor contacting continuing students who have not completed a FAFSA and offering FAFSA completion support.

Effects of FAFSA Delays

New Students

- 4% increase in the number of admitted students with no FAFSA filed

Continuing students

- 7% decline in the number of FAFSAs received
- 30% decline in number of students who have completed their FAFSA

Next NC Scholarships

For Fall/Spring, students who receive \$5,000 have:

- more than 70% of their costs covered if living off-campus
- more than 35% of their cost covered if residing on-campus

Next NC Summer Scholarships

- 47% of eligible students were awarded and enrolled in summer school
- Average award \$1,207
- Helps students get back on track/graduate

Carolina Connect

- Direct Admission Pilot Program
- Begins Fall 2025

ECSU's Initial Target Population includes:

- Hispanic students
- Students in rural schools, particularly schools in ECSU's 21-county service area, with low percentages of students pursuing college



NORTH CAROLINA AGRICULTURAL AND TECHNICAL STATE UNIVERSITY





NC Central
UNIVERSITY

Impact of FAFSA Delays

Sharon Oliver

Associate Vice Chancellor for
Enrollment Management

May 22, 2024

How Has FAFSA Delays Impacted NCCU?

- ❑ Increased Late and Non-FAFSA Filers Impact Enrollment
 - Fall Registration Financial Clearance/Validation
 - Continuing Students Applications (1,500)
 - Rejected FAFSAs – No SAI (900)
 - Decrease in Fall Enrollment Due to Financial Challenges
- ❑ Re-deployed Staff to Focus on FAFSA Completion/Rejected Records
 - Competing Priorities for Limited Staff
 - Conducting FAFSA Outreach Sessions During Critical Award Cycle
 - Hiring Temporary Employees to Survive Peak Period
- ❑ Increased Support for the Eagle Service Center (Call Center)
 - High Call Volume for FAFSA Assistance
 - Callers Requested Guidance w/ Navigating Rejected Applications
- ❑ Depleted Appropriated Grants (Federal and Institutional)
 - Highly Needy Students Award Offers Have Less Grant Funds
 - Increased Loan Debt
- ❑ Delayed Financial Aid Administrators Access to Corrections (June 2024)
 - Special Circumstances
 - Dependency Overrides
- ❑ Unable to Predict Summer Melt Using Historical Data Trends
 - Late Enrollment Cancellations for Out-of-State Prospective Students May Impact Enrollment
 - Students May Take A Gap Year Due to FAFSA Challenges

How Has the NEXT NC Scholarship Benefited Students and Families?

- ❑ Utilized Online Estimator for Campus Key Initiatives
 - Open House
 - Estimated Student Bills
 - Federal Pell and NEXT NC Scholarship Amounts
- ❑ Released the NEXT NC Scholarship Awards Immediately After SARs Were Delivered
- ❑ Updated FAFSA Corrections Rapidly
- ❑ Packaged Eligible NEXT NC Scholarship Recipients with Ease
- ❑ Funded NC Residents Award Offers Are Attractive
 - ❑ Awarded Less Loan Debt
 - ❑ Increased Grant Support
- ❑ Extended the Priority Date



Strategies Implemented to Increase Access

- ❑ Launched Text Messaging Campaigns
- ❑ Emailed FAFSA Reminder Notifications Weekly
- ❑ Notified Students with Rejected Records Specific Details to Resolve FAFSA record
- ❑ Hosted FAFSA Webinars w/ Students and Parents
 - Assessed Rejected Records
 - Designed Specialized Sessions to Address Key Issues
- ❑ Conducted One-on-One Virtual FAFSA Correction Sessions
- ❑ Employed External Entity to Conduct FAFSA Completion Campaigns
 - Setup Appointments
 - Remind Applicants to Submit FAFSA
 - Refer Student to the Eagle Service Center
- ❑ Specialized Account Review Sessions Will Be Developed
 - Financial Clearance/Validation
 - Publicize Financial Due Dates/Deadlines



THANK YOU

QUESTIONS?

ADDITIONAL INFORMATION

NC STUDENT AID STUDY GROUP

Purpose

Evaluate primary state grant programs that serve North Carolina's public college students

The Grants

- UNC Need-based Grant
- Community College Grant
- Education Lottery Scholarship

Participants

- Led by UNC System and the NCCCS
- Higher education leaders
- Financial aid officers
- State policy makers



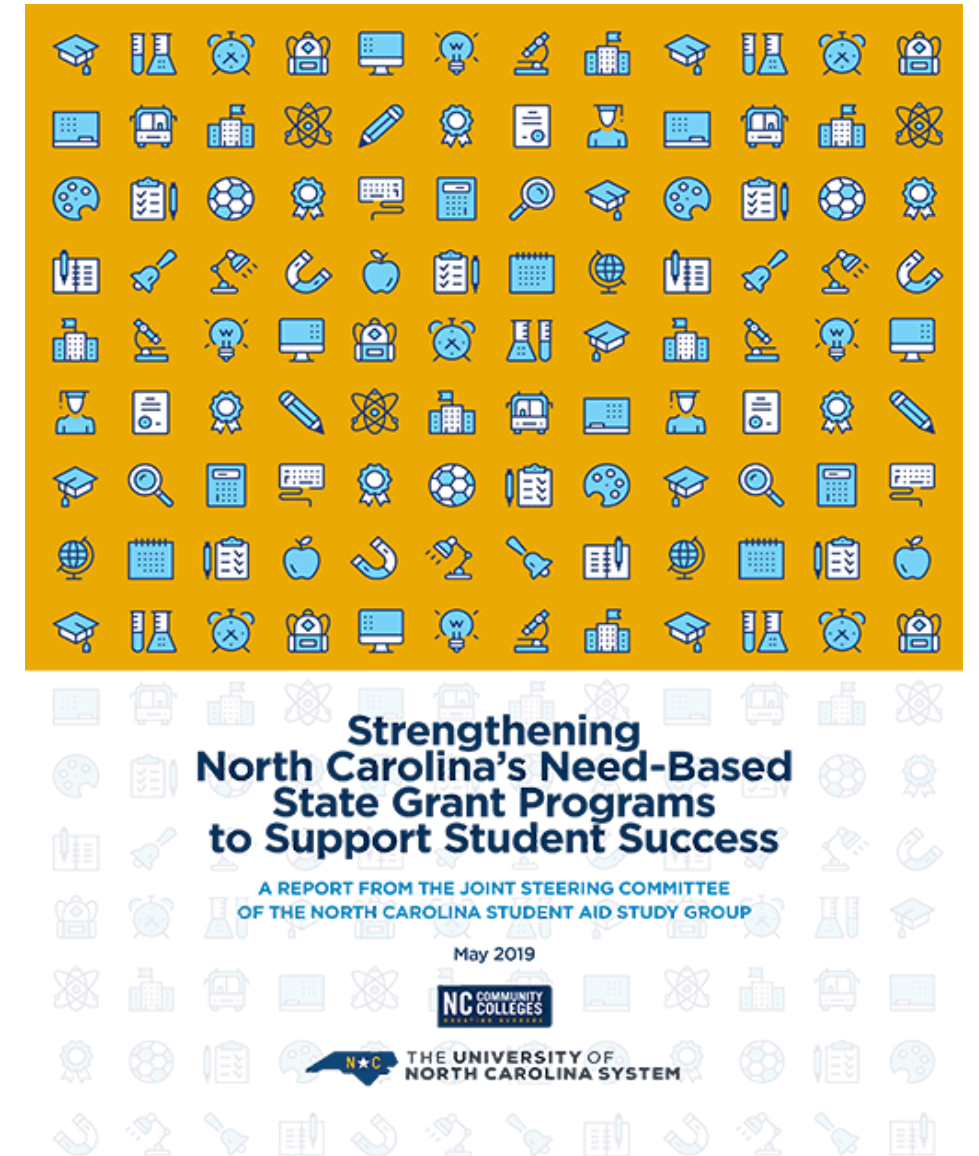
NC STUDENT AID STUDY GROUP

Study Group Process

- Assessed NC grant programs' strengths and weaknesses
- Heard from national experts in student financial aid practices across the country
- Gathered lessons learned through research and best practices in other states

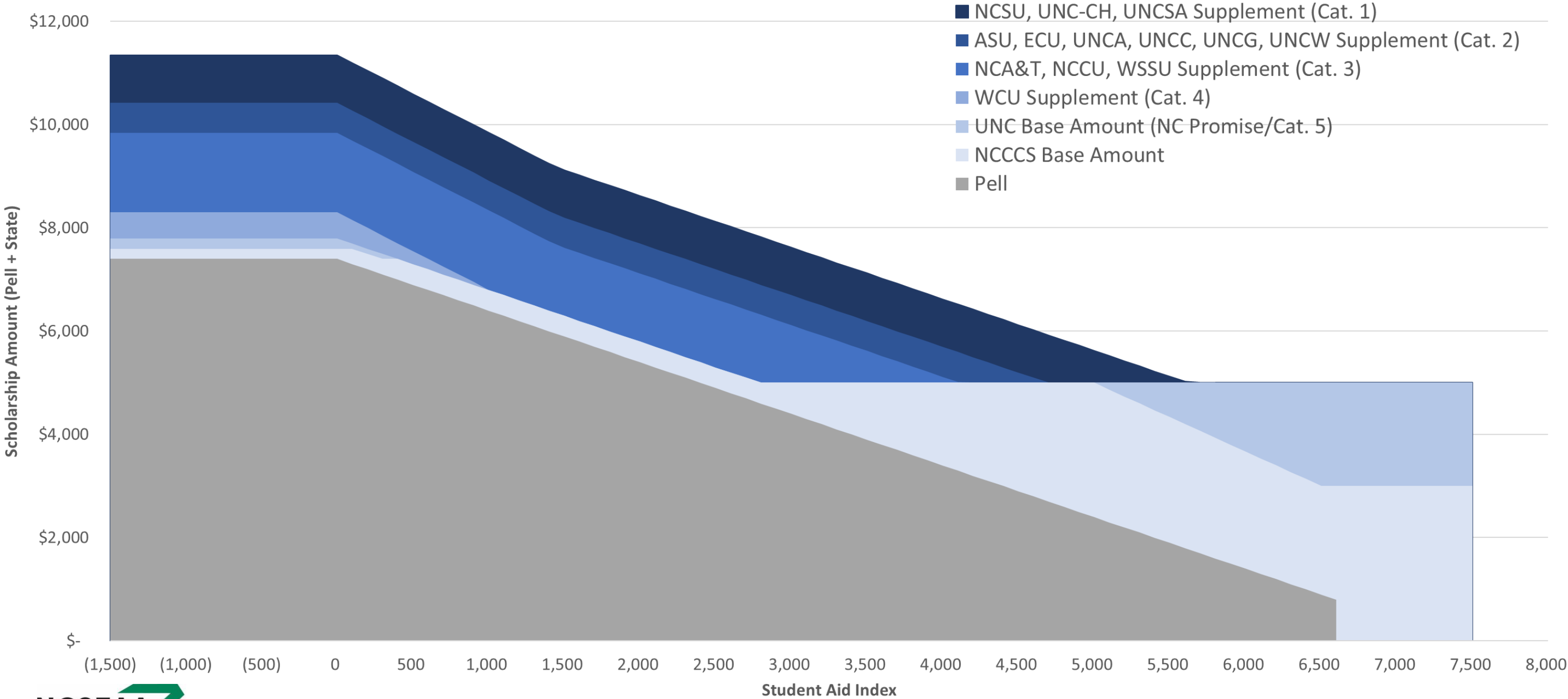
Outcomes

Based on its findings, the Aid Study Group developed evidence-based reforms to enhance the effectiveness of state aid investments.



FUNDING AMOUNTS

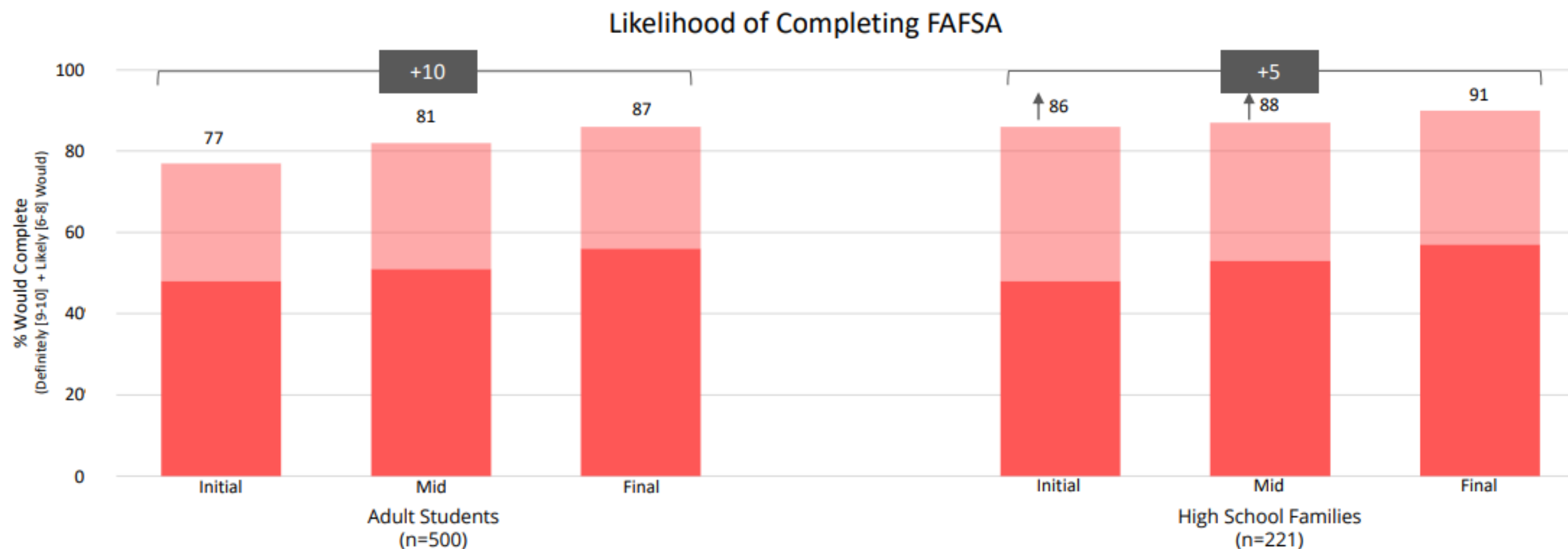
Next NC Awards



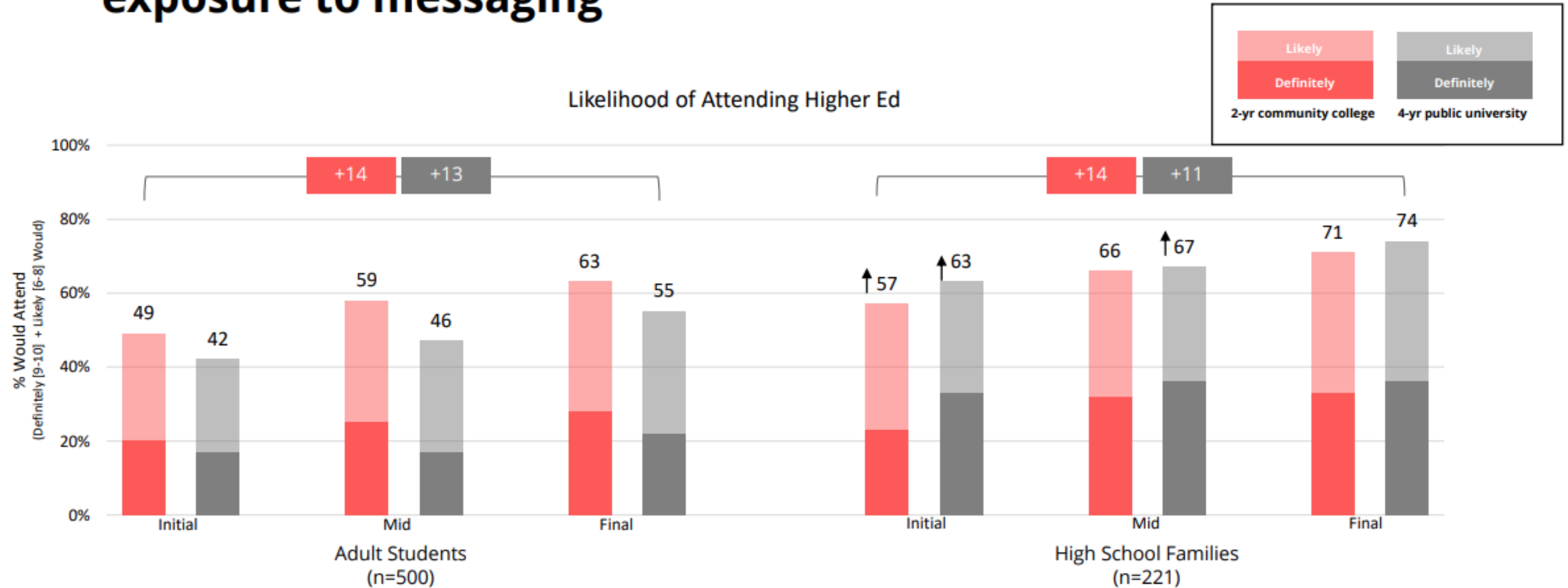
PUBLIC AWARENESS FUNDING

- **Funded by \$1.25M NR from 2021 Appropriations Act to “raise awareness of changes to the scholarship programs for students attending public colleges and universities”**
- **New contract with APCO Worldwide**
- **Temporary, specific campaign to increase awareness of available funding**
- **Focus of the campaign is making it easy for students to understand if they qualify, know how much they can count on, and completing the FAFSA**

Awareness and messaging drive likelihood to complete FAFSA



Students are more likely to attend higher education after exposure to messaging



NEXT NC WEBSITE: www.nextncscholarship.org

NEXT NC SCHOLARSHIP

Get money for college that you don't have to pay back.

That's right. The Next NC Scholarship is a financial aid program that helps most North Carolinians from households making \$80,000 or less pursue a higher education, by fully covering tuition and fees at any community college or more than half of, if not all, tuition and fees to attend any public university in the state. The best part? It's money that doesn't have to be repaid.



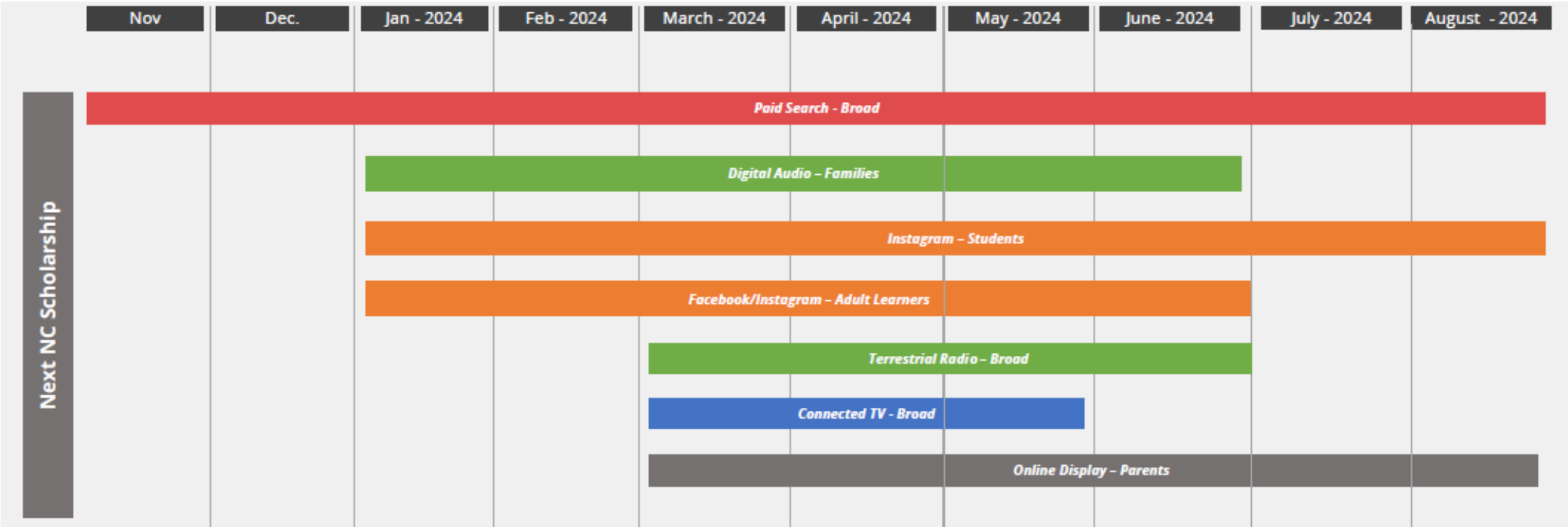
much they can get so they can make the most informed decisions for their future. The State of North Carolina has committed nearly \$180 million of financial aid for residents who qualify.



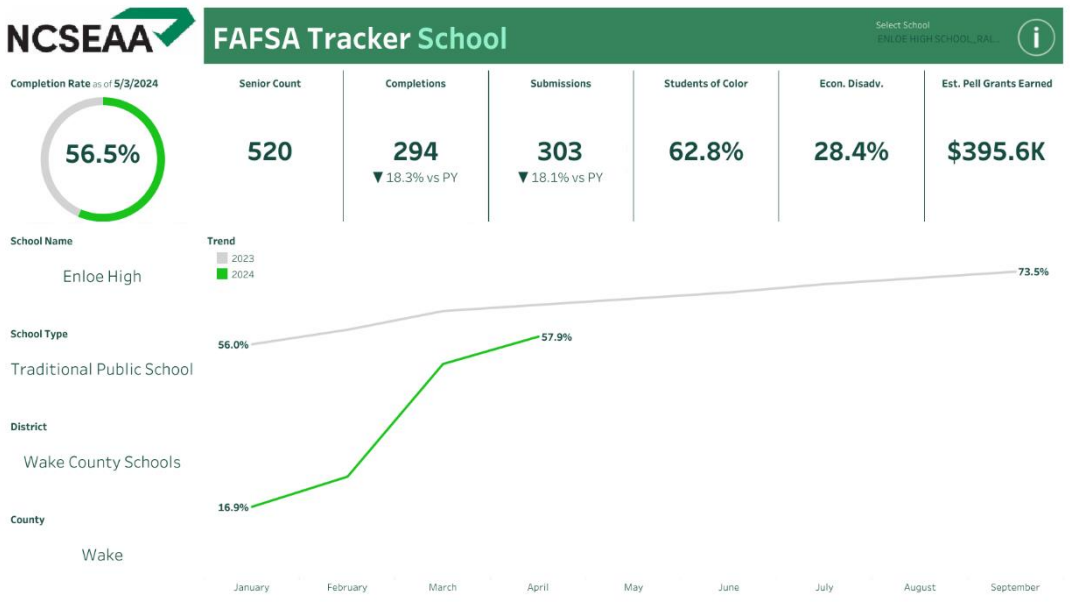
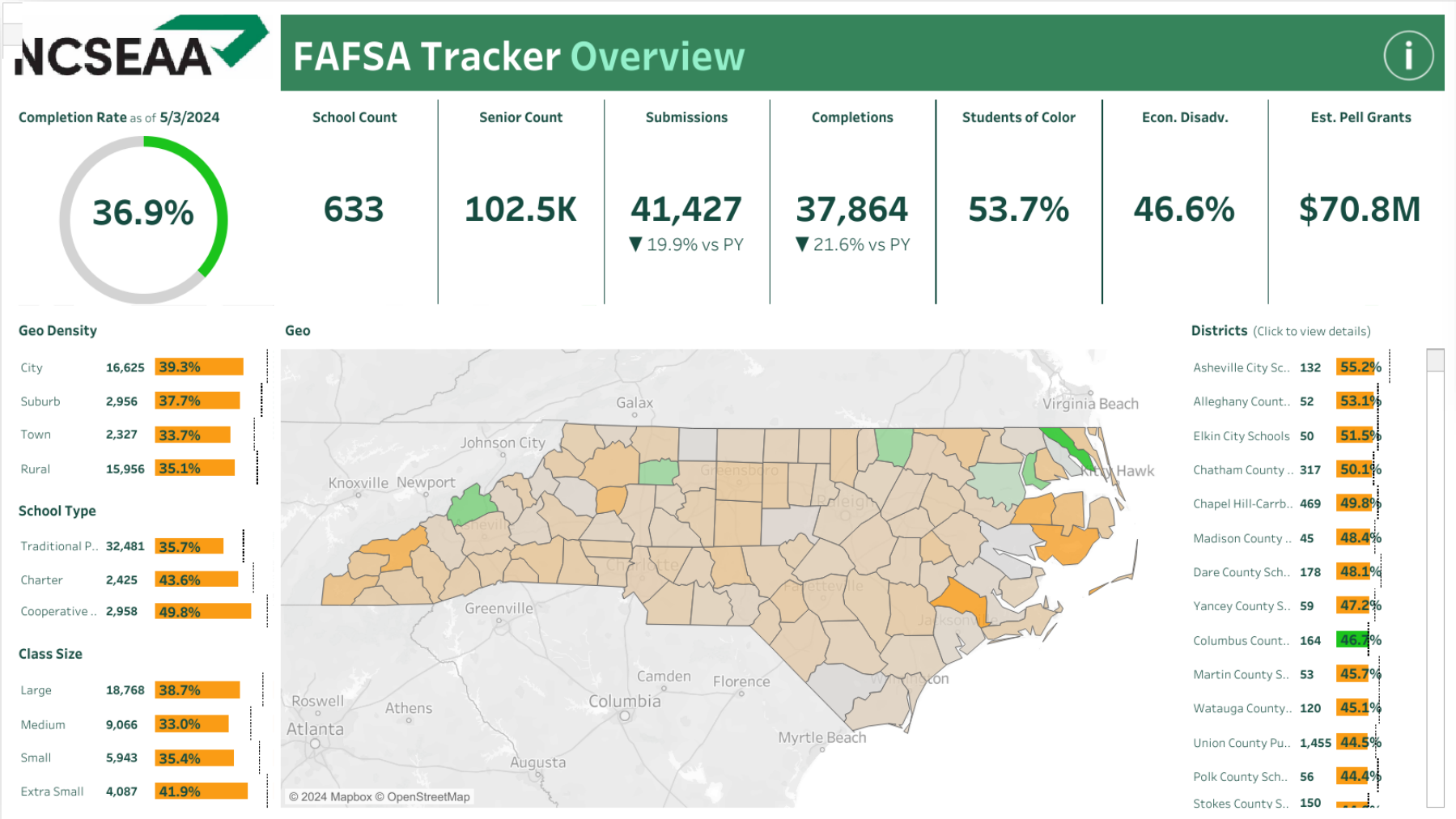
NEXT NC PAID MEDIA

Next NC Paid Channels – Currently Running

From now through August 2024, we have ads running across **seven** paid channels. The majority of these campaigns have been live for **over three months** and reach **targeted audiences across the state**.



NEW NC FAFSA TRACKER



School Name

Enloe High

School Type

Traditional Public School

District

Wake County Schools

County

Wake

Trend

2023

2024

16.9%

56.0%

57.9%

73.5%

January

February

March

April

May

June

July

August

September

NCSEAA

FAFSA Tracker Private Schools

Set Private School Senior Class Size
56

Private School Count

186

Completions

2,754

▼ 19.9% vs PY

Submissions

2,944

▼ 17.9% vs PY

Private School Detail

School Name Proper	Submissions CY	Submissions PY	Submitted diff	Completions CY	Completions PY	Completions diff	Completions Delta	Completion % CY
Alamance Christian School - Graham	0	8	-8	0	8	-8	▼ 100.0%	0.0%
Albemarle School - Elizabeth City	0	5	-5	0	5	-5	▼ 100.0%	0.0%
Antioch Christian Academy - Lumberton	0	0	0	0	0	0		0.0%
Arborbrook Christian Academy - Matthews	5	0	5	5	0	5		10.0%
Arendell Parrott Academy - Kinston	17	31	-14	16	29	-13	▼ 44.8%	32.0%
Asheboro Hybrid Academy - Asheboro	0	0	0	0	0	0		0.0%
Asheville Christian Academy - Swannanoa	46	36	10	45	36	9	▲ 25.0%	90.0%
Asheville School - Asheville	17	34	-17	16	34	-18	▼ 52.9%	32.0%
Berean Baptist Academy - Fayetteville	6	8	-2	6	7	-1	▼ 14.3%	12.0%
Bethel Assembly Christian Academy - Windsor	7	0	7	6	0	6		12.0%
Bethel Christian Academy - Kinston	7	10	-3	7	10	-3	▼ 30.0%	14.0%
Bishop McGuinness High School - Kernersville	61	82	-21	60	81	-21	▼ 25.9%	120.0%
Bradford Academy - Melbane	0	6	-6	0	6	-6	▼ 100.0%	0.0%
Brittain Academy - Thomasville	28	35	-7	18	24	-6	▼ 25.0%	36.0%
British International School Of Charlotte - Charlotte	5	0	5	5	0	5		10.0%
Burlington Christian Academy - Burlington	14	28	-14	12	27	-15	▼ 55.6%	24.0%
Caldwell Academy - Greensboro	16	28	-12	15	28	-13	▼ 46.4%	30.0%
Calvary Baptist Day School - Winston-Salem	34	45	-11	33	44	-11	▼ 25.0%	66.0%
Calvary Christian School - King	0	0	0	0	0	0		0.0%
Camelot Academy - Durham	6	5	1	6	5	1	▲ 20.0%	12.0%
Cannon School - Concord	44	65	-21	44	63	-19	▼ 30.2%	88.0%
Cape Fear Academy - Wilmington	23	32	-9	21	31	-10	▼ 32.3%	42.0%
Cape Fear Christian Academy - Erwin	9	14	-5	8	14	-6	▼ 42.9%	16.0%
Cardinal Gibbons High School - Raleigh	173	250	-77	161	240	-79	▼ 32.9%	322.0%