Program Authorization and Purpose

The Toward EXcellence, Access, & Success (TExAS) Grant Program is authorized by Chapter 56, Subchapter M of the Texas Education Code. Rules establishing procedures to administer the subchapter can be found in Chapter 22, Subchapter L of the Texas Administrative Code. The program is funded by appropriations authorized by the Texas Legislature from various revenues and gifts to the program. The purpose of the TExAS Grant Program is to provide grants of money to enable eligible students to attend public institutions of higher education in this state.

State Priority Deadline

Though all institutions are encouraged to do so, the General Academic Teaching Institutions (GATI’s) in Texas (public universities, Lamar-Orange, and Lamar-Port Arthur) are required to publicize and use March 15 as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions have the flexibility to define what it means to meet the priority deadline at their institution.

Allocations

Beginning in 2014-15, public community, technical, and state colleges will no longer be eligible to make initial year (IY) TExAS Grant awards to students at their institutions. These institutions may make renewal year (RY) awards to eligible students who received an IY award prior to fall 2014 through their institution or another public 2-year institution. These institutions will not receive an allocation for IY or RY awards. Funding for RY awards will be provided on an as-needed basis.

Public universities and Health-Related Institutions (HRI’s) will continue to be eligible to make IY and RY awards at their institutions. HRI’s will receive an allocation only for RY awards, and additional renewal funding will be provided on an as-needed basis. Public universities will receive a single allocation from which they are to make both initial and renewal awards.

Eligible renewal students should be given ample time to apply for and receive awards through the single allocation. The institution should establish a cut-off date for holding funds for renewal students. This cut-off date cannot be earlier than the state priority deadline of March 15.

Allocations dedicated for initial year students at the public universities must first be used for students meeting the priority model requirements by the priority deadline. If funds remain for IY awards after all eligible priority students who met the priority deadline have been awarded, the balance of allocated funds for IY students can go to students who met the basic IY requirements by the priority deadline. If funds remain for IY awards after all priority deadline eligible students have been awarded, then the balance of allocated funds for IY students can go to students who met the basic or priority model requirements after the priority deadline.

Basic Initial Year (IY) Student Eligibility Requirements

To receive a basic initial award through the TExAS Grant Program, a student must:

- Be enrolled at least three-quarter time as:
  - An undergraduate baccalaureate student who:
    - graduated from an accredited public or private high school in Texas;
    - completed the Foundation, Recommended, or Distinguished Achievement high school program (or the equivalent); and
    - enrolled in an undergraduate degree or certificate program at an approved institution within 16 months from high school graduation having not accumulated more than 30 SCH’s (excluding credits for dual enrollment or by examination); OR
  - An undergraduate baccalaureate student who:
    - earned an associate’s degree from a public or private nonprofit institution of higher education in Texas, and
    - enrolled in an eligible institution within 12 months after receiving the associate’s degree; OR
o An undergraduate baccalaureate student who:
  ▪ graduated from an accredited public or private high school in Texas May 1, 2013 or later;
  ▪ completed the Foundation, Recommended or Distinguished Achievement high school program (or the equivalent); and
  ▪ enlisted in military service within 12 months of high school graduation and enrolled in an eligible GATI within 12 months of receiving an honorable discharge; OR

o An undergraduate baccalaureate student who:
  ▪ transfers into a public university in Texas with at least 24 SCH’s and a minimum 2.5 GPA; and
  ▪ received an initial year (IY) Texas Educational Opportunity Grant (TEOG) in Fall 2014 or later;

• Be registered with Selective Service, or be exempt;
• Have a 9 month EFC of no more than $4,800;
• Be classified by the institution as a Texas resident; and
• Have not been convicted of a felony or crime involving a controlled substance.

**Priority Model Initial Year (IY) Student Eligibility Requirements**

To receive priority consideration for an IY award through the TEXAS Grant Program, a student must:
• Graduate from an accredited high school in Texas May 1, 2013 or later and enroll in a public university or health-related institution in Texas;
• Meet the basic initial year (IY) student eligibility requirements (see section above);
• Meet the state priority deadline of March 15; and
• Meet at least one requirement in at least 2 of the following 4 areas:

<table>
<thead>
<tr>
<th>AREA</th>
<th>REQUIREMENT(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Academic Program</td>
<td>12 hours of college credit (dual credit or AP courses), complete the Distinguished Achievement Program (DAP), or complete the International Baccalaureate Program (IB).</td>
</tr>
<tr>
<td>TSI Readiness</td>
<td>Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption.</td>
</tr>
<tr>
<td>Class Standing</td>
<td>Graduate in the top one/third of the HS graduating class or have a B average.</td>
</tr>
<tr>
<td>Advanced Math</td>
<td>Complete at least one math course beyond Algebra II as determined by the Texas Education Agency (TEA).</td>
</tr>
</tbody>
</table>

**Students On-Track to Meet the IY Requirements When Admitted to the Institution**

Applicants who are on-track to meet the IY requirements at the time they are admitted to the institution can be awarded an IY award. If the student does not complete the requirements as expected, the institution has the following options:
• **Priority Model IY Students:**
  Confirm whether or not the student originally awarded via the priority model criteria completed the basic eligibility requirements.
  o If yes, then no further action is required.
  o If no, then either:
    ▪ Decide to leave the award and prohibit future consideration for an RY award; or
    ▪ Cancel the award and use the available funding for another eligible student.

• **Basic IY Students:**
  Confirm whether or not the student completed the basic eligibility requirements.
  o If yes, then no further action is required.
  o If no, then either:
    ▪ Decide to leave the award and prohibit future consideration for an RY award; or
    ▪ Cancel the award and use the available funding for another eligible student.

• **Associate Degree Recipients:**
  Confirm whether or not the student completed the Associate’s Degree.
  o If yes, then no further action is required.
  o If no, then either:
    ▪ Decide to leave the award and prohibit future consideration for an RY award; or
    ▪ Cancel the award and use the available funding for another eligible student.
Renewal Year (RY) Student Eligibility Requirements

To receive consideration for a renewal year (RY) award through the TEXAS Grant Program, a student must:

- Be enrolled at least three-quarter time as:
  - an undergraduate student at a public 2-year institution who previously received an IY award prior to fall 2014 at a public 2-year institution,
  - an undergraduate student at a public 4-year or HRI institution who previously received an IY award prior to fall 2014 at a public 2-year, 4-year, or HRI institution, or
  - an undergraduate student enrolled in a baccalaureate program at a public 4-year or HRI institution who received an IY award fall 2014 or later.
- Be registered with Selective Service, or be exempt;
- Have a calculated financial need;
- Maintain satisfactory academic progress (see the Satisfactory Academic Progress sections below). NOTE: student status information is available to assist institutions with monitoring this requirement via the GSP Information Website (see Additional Program Information below).
- Be classified by the institution as a Texas resident; and
- Have not been convicted of a felony or crime involving a controlled substance.

Award Amounts for 2014-2015

Due to limited funding, institutions are requested to do what they can to stretch their TEXAS Grant allocated dollars to include a significant number of new recipients. The FY15 maximum and targeted average award amounts are listed below. Institutions are encouraged to achieve the target average award amounts to be able to fund eligible renewal students as well as fund newly eligible students.

IY awards can only be made to eligible students whose EFC’s are $4,800 or less (9-month EFC). RY awards can be made to eligible students with EFC’s higher than $4,800 as long as the student has a calculated need. A TEXAS Grant award cannot exceed the student’s calculated need.

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>Awd Max/Year</th>
<th>Awd Max/Sem</th>
<th>Target Awd/Year</th>
<th>Target Awd/Sem</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Universities, Health-Related Institutions, and State Colleges</td>
<td>$8,000</td>
<td>$4,000</td>
<td>$5,000</td>
<td>$2,500</td>
</tr>
<tr>
<td>Public Community Colleges</td>
<td>$2,700</td>
<td>$1,350</td>
<td>$1,325</td>
<td>$663</td>
</tr>
<tr>
<td>Public Technical Colleges</td>
<td>$4,700</td>
<td>$2,350</td>
<td>$2,500</td>
<td>$1,250</td>
</tr>
</tbody>
</table>

Award amounts must be prorated if the student is in one of the following situations:

1. The student has an approved hardship and is enrolled less than ¾-time, but at least ½-time (see the section Hardship Provisions below).
2. The student has fewer than 9 hours remaining of the 150 or 90 SCH limit and is enrolled at least ½-time.

Required matching for prorated amounts is limited to the amount of tuition and fees for the number of hours for which the grant is received (see the section Required Matching below).

The proration schedule is as follows for a hardship approval:

<table>
<thead>
<tr>
<th>Student Hardship Approved</th>
<th>Enrolled 9 Hours or More</th>
<th>Enrolled 6-8 Hours</th>
<th>Enrolled Less Than 6 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Hardship Approved</td>
<td>Maximum eligibility = 100% of a maximum award amount for the semester</td>
<td>Maximum eligibility = the maximum award for the semester divided by 12 and multiplied by the number of hours enrolled</td>
<td>No Award</td>
</tr>
</tbody>
</table>

The proration schedule is as follows for a student with fewer than 9 hours remaining of the 150 or 90 SCH limitation:

<table>
<thead>
<tr>
<th>Student Enrolled at Least ¾-Time</th>
<th>Remaining Hours = 9 Hours or More</th>
<th>Remaining Hours = 6 – 8 Hours</th>
<th>Remaining Hours = Fewer Than 6 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Maximum eligibility = 100% of a maximum award amount</td>
<td>Maximum eligibility = 50% of a maximum award amount</td>
<td>Maximum eligibility = 25% of a maximum award amount</td>
</tr>
<tr>
<td>Student Enrolled ½-Time</td>
<td>Only with approved hardship (see hardship schedule)</td>
<td>Maximum eligibility = 50% of a maximum award amount</td>
<td>Maximum eligibility = 25% of a maximum award amount</td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------------------------------------</td>
<td>---------------------------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>Student Enrolled Less Than ½-Time</td>
<td>No Award</td>
<td>No Award</td>
<td>No Award</td>
</tr>
</tbody>
</table>

**Required Matching**

TEXAS Grant is intended to cover an eligible student’s cost of tuition and fees for the award period. Since the annual maximum award amounts (see above) are based on state tuition and fee averages, the allowed award amount (both maximum and targeted average) might not cover the student’s actual tuition and fees for the award period. In this situation, additional non-loan aid must be matched with the grant to cover the costs of the student’s tuition and fees up to the student’s calculated need, whichever is less. Matching non-loan aid may include any non-loan program awarded to the student from federal, state, institutional, or outside sources. In order to strive for the average award amount to bring as many eligible students into the program pipeline as possible, institutions may be required to shift more of their non-loan aid resources to meet this statutory requirement.

**Texas Private High School Certification**

For determining eligibility of students graduating from a private high school in Texas, the private high school must submit a certification that the student has completed the equivalent of the required high school curriculum. The certification is located at [www.thecb.state.tx.us/UAP](http://www.thecb.state.tx.us/UAP) on the Coordinating Board website.

**Adhering to Program Controlled Substance Restrictions**

Institutions are required to collect a statement (electronically or on paper) from each TEXAS Grant recipient prior to the disbursement of funds confirming eligibility in regards to the controlled substance restrictions of the program. This statement must be retained with the student’s records at the institution and be made available if requested in the course of a program review or audit.

As long as a statement can be produced to prove a recipient’s eligibility for a given award period, the institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. The institution can require all TEXAS Grant recipients to complete the statement every year they receive a TEXAS Grant award. The institution can also choose to collect the statement at least once from each TEXAS Grant recipient at the institution and word the statement in such a way to indicate that by signing, the student agrees that it is his/her responsibility to inform the institution if his/her status changes in the future. By choosing the second option, the institution can limit the statement required each year to initial or incoming recipients at the institution.

An example statement follows:

<table>
<thead>
<tr>
<th>Statement of Student Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have you ever been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?</td>
</tr>
<tr>
<td>_____ Yes* _____ No**</td>
</tr>
</tbody>
</table>

* If your answer is yes, contact the financial aid office to determine your eligibility to receive a TEXAS Grant.
** If your answer is no, it is your responsibility to inform the financial aid office if this status changes at any time while attending the institution.

I hereby certify that the information I have provided in this statement is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed. I also understand that it is my responsibility to inform the financial aid office if my status concerning this statement of eligibility changes at any time while attending this institution.

________________________________________
Student Signature

________________________________________
Date
Institutions should consult with the institution’s legal counsel concerning individual student situations as they pertain to the conviction of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code.

**Satisfactory Academic Progress (SAP) – GPA and Completion Rate**

Each recipient’s GPA and completion rate must be monitored to ensure compliance as outlined below. Student award history information is available to assist institutions with monitoring this requirement via the G&S Information Website.

<table>
<thead>
<tr>
<th>GPA</th>
<th>End of Initial Year</th>
<th>Institution’s SAP Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Subsequent Years</td>
<td>Minimum 2.5 cumulative GPA *</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completion Rate</th>
<th>End of Initial Year</th>
<th>Institution’s SAP Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Subsequent Years</td>
<td>Successful completion of 24 hours for the year **</td>
<td></td>
</tr>
</tbody>
</table>

* Since the GPA requirement is cumulative, eligibility can be regained in the fall for a spring award, or in the summer for a fall award.
** Since the completion rate is for the year, eligibility can be regained in the summer for a fall award.

NOTE: If a student takes hours in the summer to reach the required number of hours, the GPA should also be checked to confirm the student is still in compliance.

**Satisfactory Academic Progress (SAP) – Maximum Time Frame**

Each recipient’s maximum time frame must be monitored to ensure compliance as outlined below:

<table>
<thead>
<tr>
<th>Recipient Entering the Program as a High School Graduate</th>
<th>Maximum time frame for receiving the grant is the first of:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• 5 years from the start of the semester in which the student received the first award if in a degree plan of 4 years or less;</td>
</tr>
<tr>
<td></td>
<td>• 6 years from the start of the semester in which the student received the first award if in a degree plan of more than 4 years;</td>
</tr>
<tr>
<td></td>
<td>• 150 SCH attempted while receiving the grant; or</td>
</tr>
<tr>
<td></td>
<td>• completion of a baccalaureate degree.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recipient Entering the Program with an Associate’s Degree</th>
<th>Maximum time frame for receiving the grant is the first of:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• 3 years from the start of the semester in which the student received the first award if in a degree plan of 4 years or less;</td>
</tr>
<tr>
<td></td>
<td>• 4 years from the start of the semester in which the student received the first award if in a degree plan of more than 4 years;</td>
</tr>
<tr>
<td></td>
<td>• 90 SCH attempted while receiving the grant; or</td>
</tr>
<tr>
<td></td>
<td>• completion of a baccalaureate degree.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recipient Entering the Program as a Transfer Student with 24 SCH’s, a 2.5 GPA, and an IY TEOG Award 14/15 or later</th>
<th>Maximum time frame for receiving the grant is the first of:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• calculation for years of eligibility TBD – update will be made available as soon as possible;</td>
</tr>
<tr>
<td></td>
<td>• calculation for SCH’s of eligibility TBD – update will be made available as soon as possible;</td>
</tr>
<tr>
<td></td>
<td>• completion of a baccalaureate degree.</td>
</tr>
</tbody>
</table>

**Hardship Provisions**

In the event of a hardship or for other good cause, an otherwise eligible student may be allowed to receive an award while:

- enrolled for an equivalent of less than ¾-time, but at least ½-time,  
- with a GPA below SAP requirements, or  
- with the number of completed hours below SAP requirements

Such hardship conditions may include, but are not limited to:

- a severe illness or other debilitating condition that may affect the student’s performance,  
- an indication that the student is responsible for the care of a sick, injured, or needy person and the provision of care is affecting the student’s performance, or  
- enrolling below ¾-time to complete the student’s degree plan.
No hardship provision may be granted to allow an award in excess of the 150 SCH or 90 SCH limitation. However, provisions may be made for the following:

- an extension of the year limits due to documented hardship, or
- an exception to the 16 month rule for high school graduates due to documented hardship suffered by the student or the student’s family which would rank the student as one of the institution’s neediest.

Each institution must adopt a hardship policy and have it available for public review upon request. All hardship decisions must be documented in the student’s record and be available for submission to the Coordinating Board if requested.

**Requesting TEXAS Grant Funds**

Requests for funds must be made by using the Funds Request Form (FRF) which will be updated and available for FY15 activities starting September 1, 2014. Any funds that have not been requested as of the close of business on February 20, 2015 or the first business day thereafter if it falls on a weekend or business holiday, will be swept by the Coordinating Board for reallocation to other institutions.

**Funds Requests**

Requests for funds may be made periodically as needed for current, immediate disbursements.

1. Funds received by the institution must be disbursed to students or applied to students’ accounts within five business days of receipt by the institution’s fiduciary institution.
2. Data submitted via the funds request form (available via the G&SP Information Website) will be tracked to monitor fund utilization for the fiscal year. Accuracy is important. This information is used to provide quarterly reports to the Legislature and in the allocation of funds for the following year.
3. Requests will be processed and funds issued within three working days of the date the request is received.
4. A message will be sent to the institution’s TEXAS Grant contact person’s email address to confirm the receipt of the institution’s submission and to acknowledge that the request has been processed. If a message verifying the submission is not received within 3 days, contact THECB at TEXASGrant@thecb.state.tx.us or resubmit the request.

**Refunding Program Monies**

Funds received and not disbursed to an eligible recipient within 5 business days of receipt must be returned to the Coordinating Board. Funds that are discovered to have been awarded to an ineligible recipient as a result of inaccurate data or any other reason must be refunded to the Coordinating Board, unless the funds can be awarded and disbursed to another eligible recipient during the current fiscal year and within 5 business days of the release of the funds from the original/intended recipient.

**Retroactive or Late Disbursements**

Funds that are disbursed after the end of a student’s period of enrollment must either be used to pay the student’s outstanding balance from his/her current year period of enrollment at the institution, or to make a payment against an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

**Reallocations**

Institutions with zero original allocation balances as of the close of business on February 20, 2015 may submit a request for reallocation via the GSP Information Website indicating the number of additional eligible students at their institution that could receive an award for the year and the total amount of additional funds requested to pay the awards.

**Authority to Transfer Funds**

Institutions participating in a combination of the TEXAS Grant and TCWS Programs may transfer up to 10% of the institution’s total annual program allocation or $20,000 (whichever is less) to the other program indicated in a given fiscal year. To exercise this authority, the institution must contact the Grants and Special Programs Office.
# Program Schedule

If the specified date falls on a weekend or holiday, the first business day thereafter is the due date.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 1, 2014</td>
<td>First day of the fiscal year – the earliest date institutions may submit Funds Requests to the CB and the first date the CB can submit vouchers to the State Comptroller’s Office for the new year.</td>
</tr>
<tr>
<td>February 20, 2015</td>
<td>Deadline for requesting originally allocated funds. Institutions lose claim to any funds not requested by the close of business on this date. Also the deadline for institutions with zero allocation balances to submit reallocations requests to make awards to eligible students not yet awarded for the year.</td>
</tr>
<tr>
<td>May 15, 2015</td>
<td>Earliest date to submit Year-End Report.</td>
</tr>
<tr>
<td>July 15, 2015</td>
<td>Year End Report due – includes student-by-student data. (NEW FOR FY2014: Awards made via the priority model must be noted as such on the EOY report.)</td>
</tr>
<tr>
<td>December 1, 2015</td>
<td>Financial Aid Database Report due - includes student-by-student data to be reconciled to year-end report data.</td>
</tr>
</tbody>
</table>

# Additional Program Information

**Distribution List:** Information concerning program processing, procedures, allocations, etc. will be communicated to institutions through the G&SP distribution list. To subscribe, go to [http://lists.state.tx.us/mailman/listinfo/txgnsp-l](http://lists.state.tx.us/mailman/listinfo/txgnsp-l).

**Program Contact Information:** Grants and Special Programs  512-427-6340 (Austin metro)  TEXASGrant@thecb.state.tx.us  1-800-242-3062 (outside Austin metro)

**GSP Information Website:**  [https://www1.thecb.state.tx.us/apps/SpecialPrograms/](https://www1.thecb.state.tx.us/apps/SpecialPrograms/)

**Texas Education Code (Statute):** [http://www.statutes.legis.state.tx.us/](http://www.statutes.legis.state.tx.us/)