



OREGON STATE GRANTS:
OREGON OPPORTUNITY GRANT AND OREGON PROMISE
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ACCESS AND COMPLETION

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STATE GRANT FUNDING – 2017-19

Oregon Opportunity Grant - \$145.9 million (GF+LF)

- \$125.2 million – General Fund
- \$20.7 million – Lottery Funds (Ed Stability Fund interest)
- Current service level (3.7% increase over 2015-17)
- 2015-17 LAB = \$140.9 million

Oregon Promise Grant - \$40 million (GF)

- \$34.7 million from SB 5524 + \$5.3M from HB 5006
- 2015-17 LAB = \$12 million est. (Original = \$9.5 million grants + \$0.5 million admin; Supplemental = \$2 million)

STATE GRANTS – POPULATIONS SERVED

Oregon Opportunity Grants – Oregon resident undergraduates with demonstrated financial need who meet other eligibility requirements and attend an eligible Oregon postsecondary institution at least half time.

- Awards available for up to 4 years at full-time, full-year enrollment; awards prorated for half-time and partial-year enrollment.

Oregon Promise Grants – Oregon resident undergraduates who attend an Oregon community college at least half time within 6 months of graduating high school or completing a GED.

- Awards available for up to 90 college credits attempted.

ADVISORY GROUPS AND NEW STUDIES

Advisory Groups

- Oregon Promise Advisory Group – 6 financial aid directors, 3 representatives from CC student support services.
- Oregon Student Aid Advisory Group – 4 for each sector: 2 financial aid directors, 1 administrator, 1 representative from constituency organization. Also includes a representative from the Oregon Student Association.

Evaluations for OPG and OOG

- Policy questions?
- Areas for inquiry?



OREGON OPPORTUNITY GRANT

**NEED-BASED
STUDENT
FINANCIAL AID**

OREGON OPPORTUNITY GRANT (OOG)

Oregon's only state-funded, need-based grant program to help low-income Oregonians achieve their academic goals.

- No age restrictions
- EFC limits : \$4000 for 2016-17; \$3500 for 2017-18 (estimated)
- Maximum award for 2016-17 and 2017-18 = \$2250*
- Used at all eligible public and private nonprofit Oregon colleges and universities.

GOAL: To increase college enrollment, completion, and affordability for Oregon students who have demonstrated financial need.

*Based on full-time (12 credit/term) full-year enrollment.

ELIGIBLE STUDENTS - OOG

- U.S. citizen or permanent noncitizen resident*
- Oregon resident and out-of-state members of certain tribes with historical ties to Oregon
- Attend eligible 2- or 4-year public/private nonprofit postsecondary institution located & headquartered in Oregon
- Undergraduate with no prior baccalaureate degrees, enrolled at least half time
- Demonstrated financial need
- Foster youth – prioritized awards, regardless of FAFSA filing date, start of enrollment, or EFC
- Up to equivalent of 12 terms or 8 semesters at full-time enrollment, prorated for half-time enrollment.

* Also students eligible for in-state tuition under Tuition Equity guidelines.

OREGON OPPORTUNITY GRANT: STUDENTS SERVED IN 2015-2017 BIENNIUM

Awards and Funds to Students, 2015-2017

Total Number Awards	81,535
Total Funds To Students	\$136M

OOG Funding Sources

	2015-17	2017-19
General Fund	\$131.0M*	\$125.2M
Lottery Funds*	\$6.1M	\$20.7M
Other Funds	\$1.2M	\$0.16M

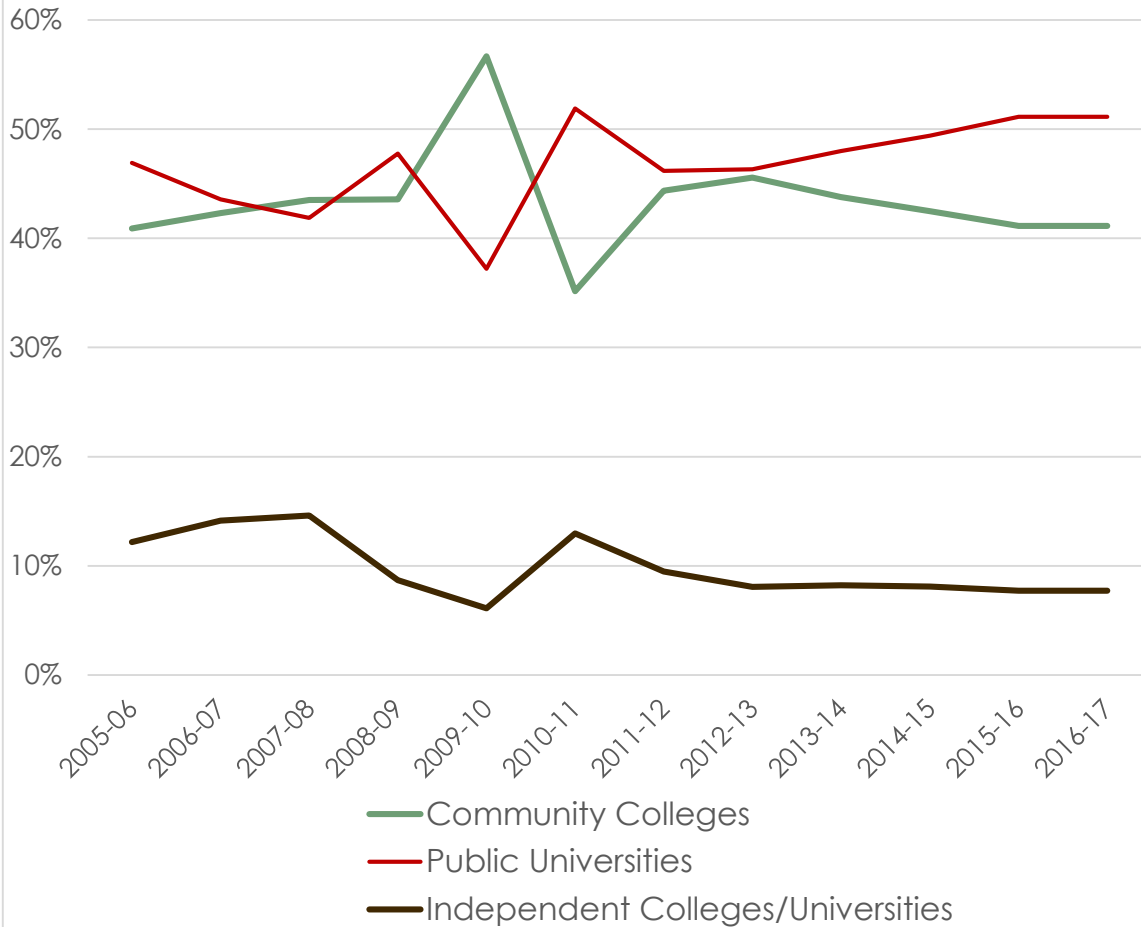
In 2016-17, 42,271 low-income students received OOG funds totaling approximately \$71.7 M.

Based on Fall 2017 data, approximately 39,300 students will receive an estimated \$68 M during the 2017-18 academic year.

* For 2015-17, \$128.9M original GF plus \$3.1M supplemental GF

TOTAL OOG DISBURSEMENTS BY SECTOR - 2005-06 TO 2016-17

OOG Disbursements by Sector



\$33.9 M disbursed in 2016-17 vs. \$26.5 M disbursed in 2015-16 to students at Oregon community colleges.

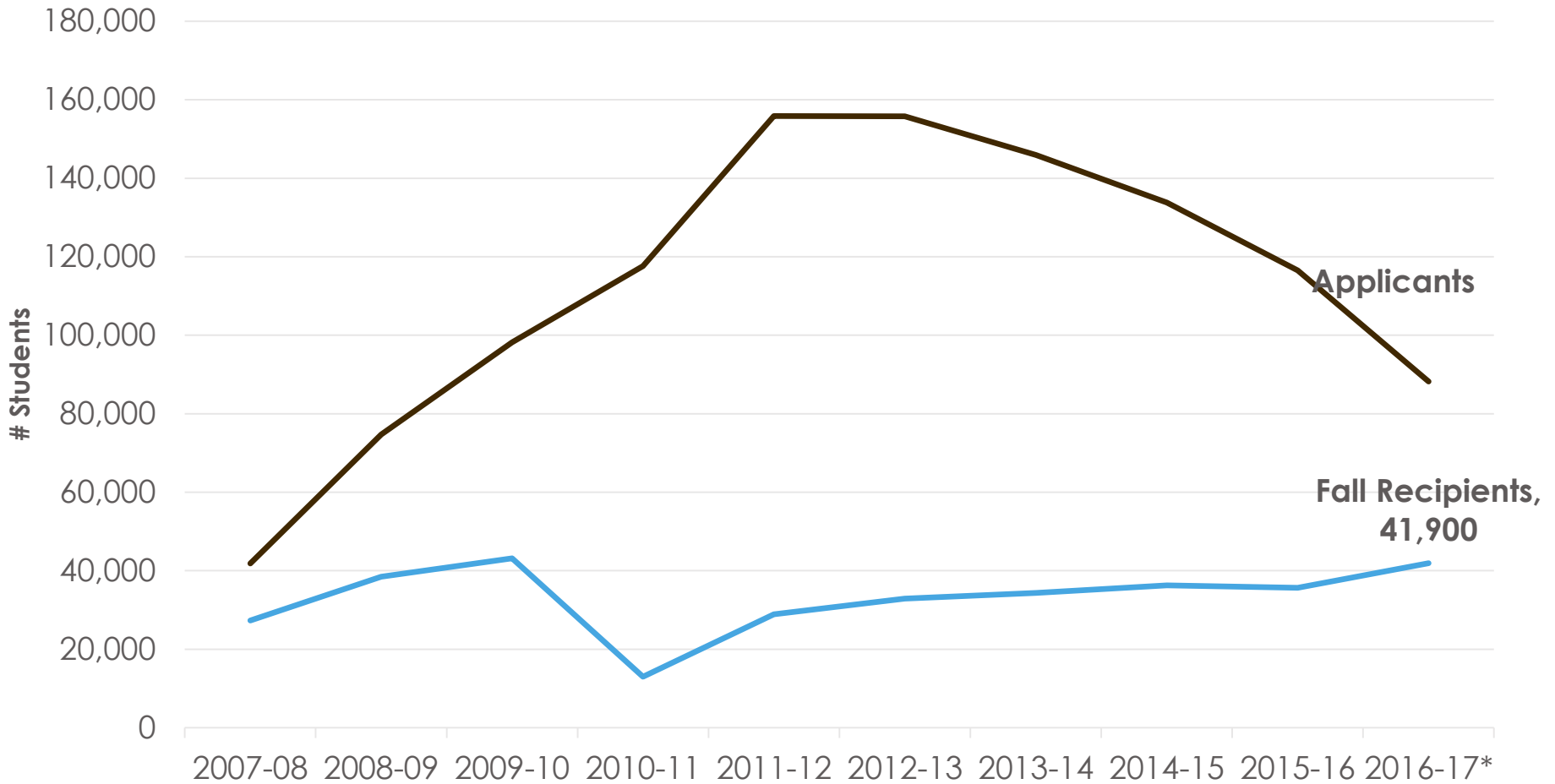
\$32.6 M disbursed in 2016-17 vs. \$32.9 M disbursed in 2015-16 to students at Oregon public universities.

\$5.0 M disbursements to Oregon private colleges and universities in both 2016-17 and 2015-16.

Source: HECC analysis.

OREGON OPPORTUNITY GRANT: FUNDING GAP

OOG Eligible Applicants vs. Recipients 2007-08 to 2016-17* YTD



Source: HECC analysis.
*Year-to-date estimates

OOG STATISTICS 2015-16 TO 2017-18

	2017-18 YTD	2016-17	2015-16
# Total FAFSAs	308,566	291,927	303,776
# Viable FAFSAs	143,325	148,198	232,178
# Eligible Applicants*	79,024	93,308	116,485
# Authorized Awards	76,033	81,891	72,962
Total Recipients	39,275	42,271	39,264
Total \$\$ Disbursed	\$68M	\$71.7M	\$64.4M

* Criteria for eligible applicants changed in 2016-17.

2017-18 OOG AWARD CALCULATIONS

Example: \$0 EFC

\$19,147 (Public 2-yr)

- \$6,200(Std Share)
- \$0 (Family Share/EFC)
- \$5,920 (Pell)
- \$0 (Tax credit)
- = \$7,027 (Rmng need)

= \$2,250 max OOG award

Example: \$0 EFC

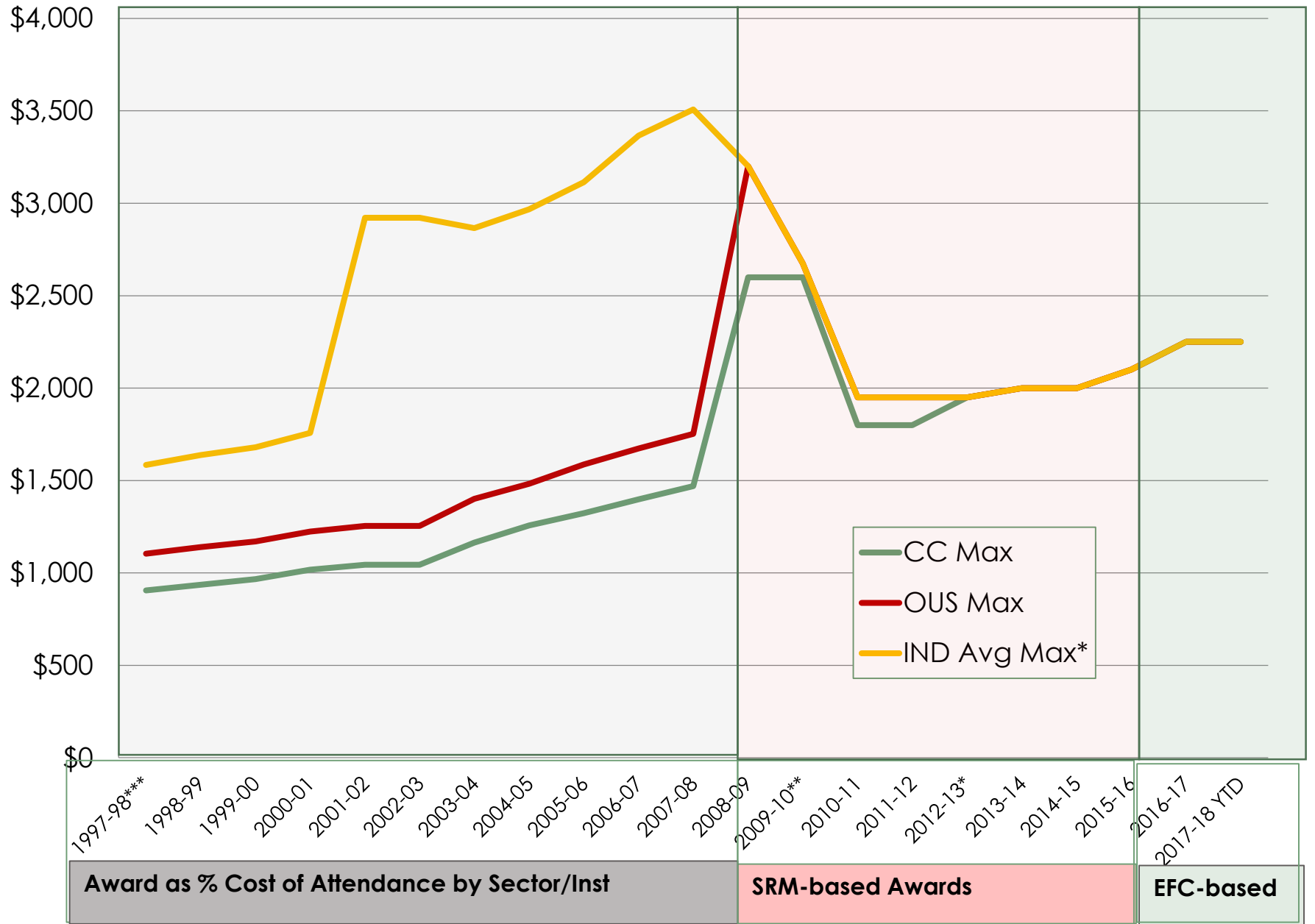
\$23,466 (Public/Priv 4-yr)

- \$9,200(Std Share)
- \$0 (Family Share/EFC)
- \$5,920 (Pell)
- \$0 (Tax credit)
- = \$8,346 (Rmng need)

= \$2,250 max OOG award

NOTE: Cost of attendance is based on prior-year student budgets
– i.e., 2016-17 costs are used for the 2017-18 award calculation.

OOG Award Maximums 1997-98 to 2017-18





OREGON PROMISE GRANT

**MERIT &
NEED BASED
AID**

OREGON PROMISE (OPG)

Provides grants to support most community college tuition costs for recent high school graduates and GED recipients.

- Established by Senate Bill 81 (2015) to “provide a waiver of tuition for community college courses.”
- Grants apply after Federal Pell and Oregon Opportunity Grant (“last dollar” model).
- Students eligible for up to 90 credits attempted (i.e. up to 2 years, or more, at full-time enrollment).
- Grant sizes range from minimum of \$1,000 to maximum of \$3,540 in 2017-18 (based on average CC tuition) for 12 credits.

GOAL: To increase college enrollment, completion, and affordability for recent high school graduates and GED recipients.

OPG – ELIGIBILITY CRITERIA



Be a recent Oregon high school graduate or GED recipient



Be an Oregon resident at least 12 months prior to attendance



Have 2.5 cumulative GPA or higher



Plan to attend an Oregon community college within 6 months of graduation



Must not have more than 90 college credits completed or attempted



Starting in 2017-2018, eligibility may be determined by the student's Expected Family Contribution (EFC). EFC limits are subject to change.

ADDITIONAL CHANGES: WAIVERS

OSAC has established a 6 –month enrollment waiver process for rare circumstances:

- Student: serious illness/injury
- Immediate family member: serious illness, injury, or death
- Active military duty, or training (including national guard)
- Major natural disaster
- Service in certain career and technical student organizations related to farming (including Future Farmers of America)

OREGON PROMISE GRANT: 2017-2019 BIENNIUM UPDATE

Preliminary Awards and Funds to Students, 2017-2019*

Returning Students (2016-17 Cohort#1)	3,746
Cohort #2, New 2017-18 Recipients*	5,594
Total Number of Students*	9,340
Total Funds Disbursed, Fall Term*	\$5.8M

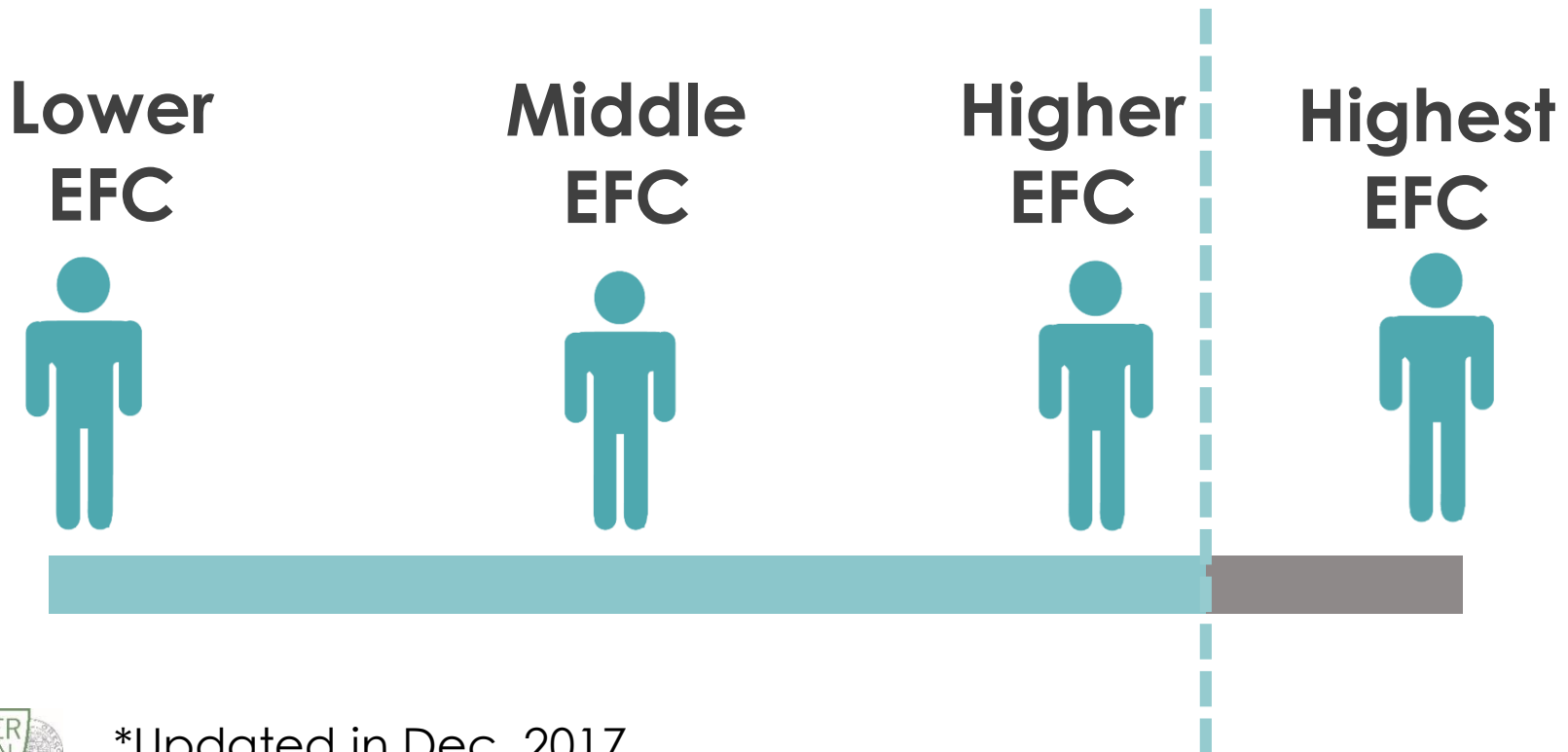
Upon review of initial fall enrollment and disbursement data, OSAC determined that it was feasible to award additional students.

OSAC increased the EFC target level from \$18,000 to \$20,000 for 2017-2018 applicants.

*Preliminary disbursement and student estimates, Fall Term 2017.

HOW DOES THE EXPECTED FAMILY CONTRIBUTION (EFC) CRITERIA IMPACT 2017-18 APPLICANTS?

The EFC limit for new 2017-18 applicants is **\$20,000***.
With this EFC limit, OSAC was able to award approximately 4 out of 5 eligible new applicants in Fall 2017.

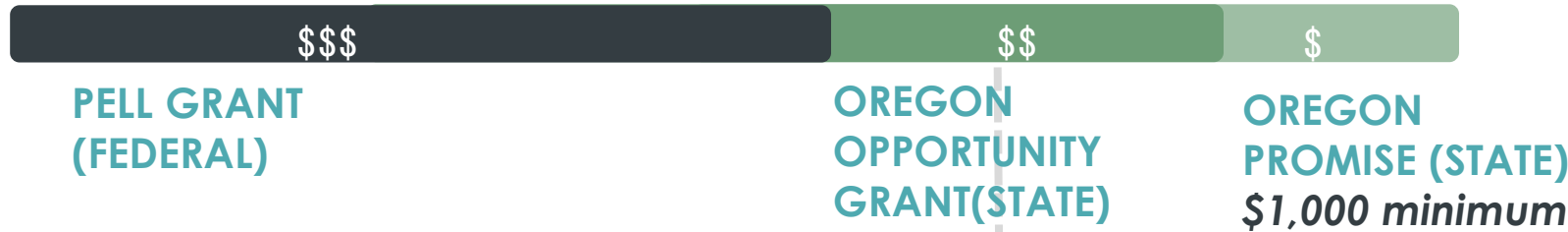


*Updated in Dec. 2017

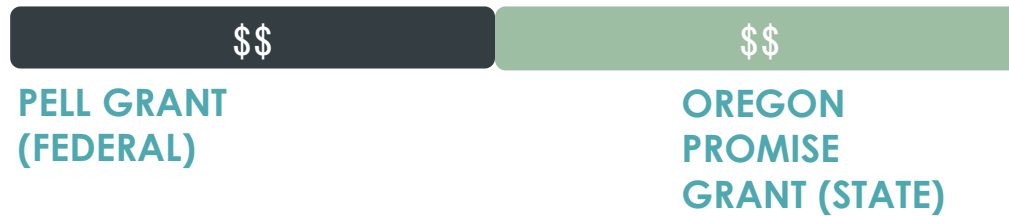
Oregon Promise pays remaining tuition after: Federal Pell Grant & Oregon Opportunity Grant



Student A: Lower Expected Family Contribution



Student B: Moderate Expected Family Contribution



Student C: Higher Expected Family Contribution



\$3,540: Average cost for 3 terms
@
12 credits (2017-18)

MOST STUDENTS IN COHORT 1 COMPLETED ALL REQUIREMENTS

70% of fall recipients

- ✓ Enrolled for three terms
- ✓ Enrolled in at least 6 credits each term
- ✓ Completed the first-year experience

Retention and term requirements

- 87 percent of fall students enrolled in winter term
- 74 percent of fall students enrolled 3 consecutive terms

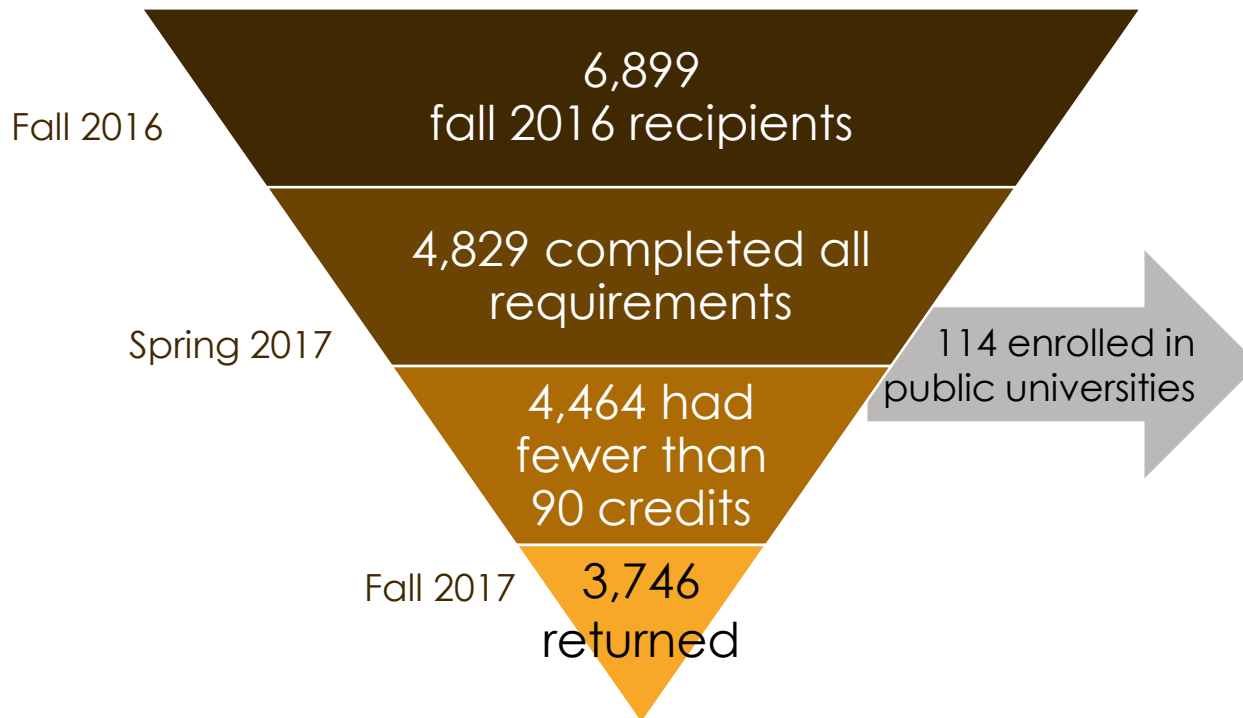
First-year course requirement

- 94 percent of those who enrolled in all three terms completed the first-year experience course
- An additional one percent completed it fall 2017

Course load

- Among those enrolled for three terms:
 - 71 percent enrolled full time in all three terms
 - 25 percent enrolled full time in one or two terms

NEARLY ALL STUDENTS WITH REMAINING ELIGIBILITY RETURNED FOR YEAR 2



84% of Cohort 1 students who completed all requirements and were not at the 90-credit limit returned in year 2

An additional **9%** (424 students) had less than one full term of remaining eligibility at the end of year 1 (fewer than 12 credits)

HOWEVER, SOME STUDENTS DID NOT FULFILL REQUIREMENTS, USUALLY MISSING A TERM

30% of students did not complete all requirements

- Nearly all missed one or more terms of enrollment
 - 44 percent missed winter and spring term
 - 50 percent missed spring term
- 94 percent of students who missed a term had not met the 90-credit limit

Some students applied for a second year of the program and were denied

Reason for denial	Number of students
Not consecutively enrolled in prior year ¹	2,124
Attempted 90 or more total college credits	157
First year experience not met	119
FAFSA/ORSAA filed late ²	76
Rejected FAFSA	47
Other reasons	68
Total	2,591

Applications can be denied for more than one reason

Notes: ¹Of these 2,124 students, 1,408 students had 1 or more other reasons for not being renewed, in addition to not being consecutively enrolled during the prior award year.

²The Oregon Promise deadline to file the 2017-18 FAFSA/ORSAA was 7/14/17.

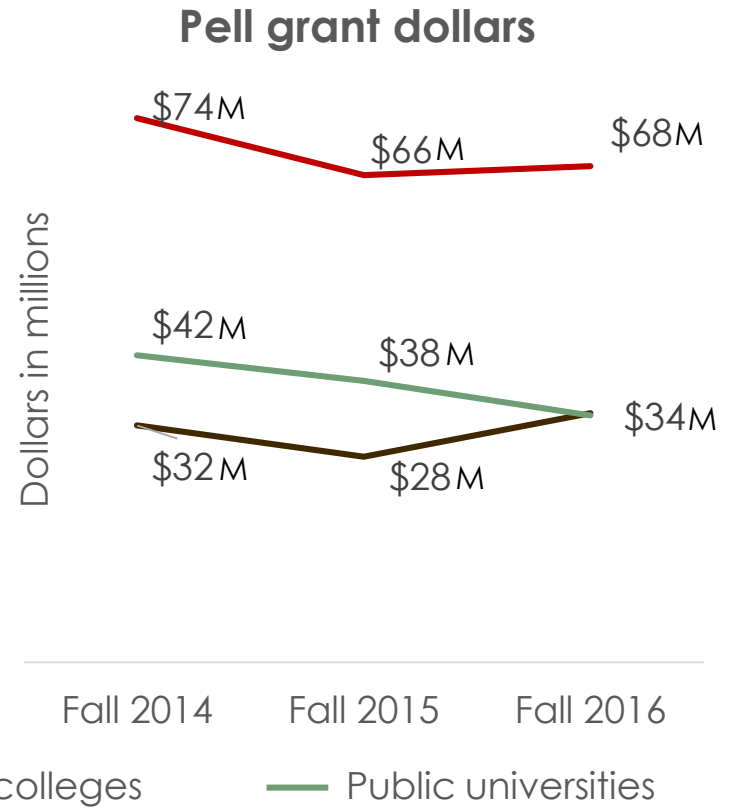
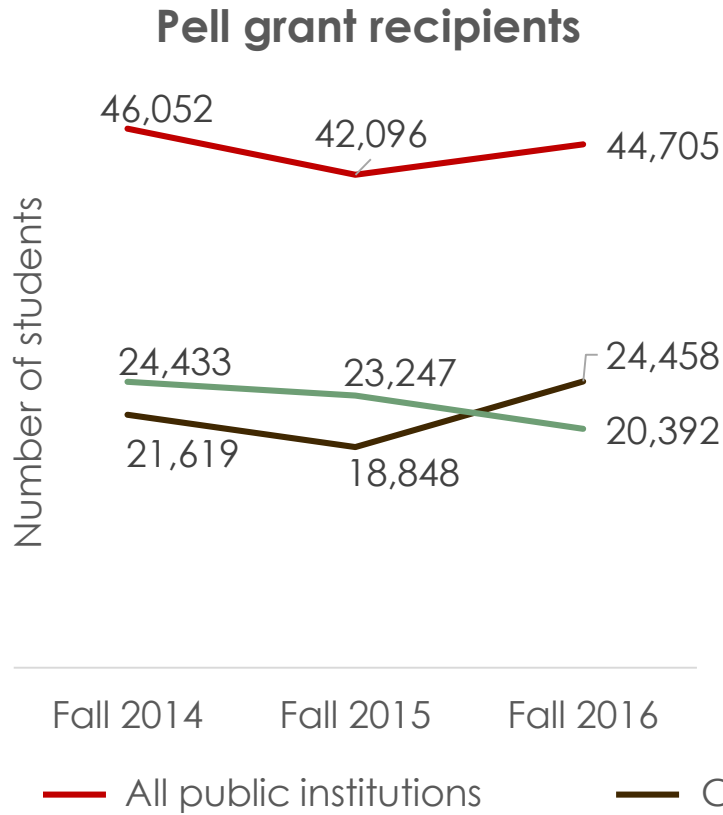
Source: HECC analysis of Oregon Promise recipient and public university student records, as of December 2017.

RENEWAL ELIGIBILITY



1. **Complete the First-Year Experience** as directed by the community college.
2. Maintain **Satisfactory Academic Progress**, as determined by the community college.
3. Maintain at least half-time **continuous enrollment** (6 or more credits) during fall, winter and spring terms each year.
4. Complete any other requirements or requests from the community college in a timely manner.
5. *Not exceed the maximum of **90 credits**.*

THE “LAST DOLLAR” NATURE OF THE PROGRAM MAXIMIZES FEDERAL AID, WHICH HAS RISEN



Oregon Promise students received an estimated:

- \$5.2M of Pell grants in fall 2016
- \$8.1M of Pell grants in fall 2017

Source: U.S. Department of Education, Title IV Program Volume Reports, <https://studentaid.ed.gov/sa/about/data-center/student/title-iv> and HECC analysis of Oregon Promise student records.

THANK YOU!

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