Universal FAFSA

Midwest FAFSA Summit

Angel McAllister, *Director for State Financial Aid*
Kate Marling, *Postsecondary Transitions Manager*
Created in 1971 by an act of the General Assembly and signed into law by then Governor Edgar Whitcomb, the Indiana Commission for Higher Education is now in its fifth decade of service to the State of Indiana.

The Commission is not a governing board, but a coordinating agency that works closely with Indiana’s public and independent colleges. In addition, the Commission has strong working relationships with many other State agencies, including the Department of Education, the Department of Workforce Development and the Independent Colleges of Indiana.

Commissioner Lowery – Four Cabinet Members – 5 Associate Commissioners

Teams
- Academic Affairs
- Adult Strategy
- Business Intelligence
- Finance
- Financial Aid
- K-12 Strategy
- Legislation and Policy
- Marketing and Communication
THE HOPE AGENDA GOALS

Hoosier Opportunities & Possibilities through Education

Indiana’s goal is to be Top 10 in the nation by 2030 in the following areas:

- **Post-high school training and education going-rates** for youth and adults, across all demographics.

- **Postsecondary attainment** for veterans, individuals with disabilities and the justice involved.

- **Utilization of credit for prior learning.**

- The rate at which Hoosiers successfully complete their chosen areas of study.

- **Retaining talent** once someone has graduated.

- Measurable distinction of social and economic mobility and prosperity.

- As a recognized state for growing or starting a business based upon the strength of human capital.
WHERE WE STARTED

▸ FAFSA is the **gateway** to state, federal, and most institutional financial aid.

▸ The Commission has an **outreach team** dedicated to helping students and families file the FAFSA and training schools and community partners to provide support.

▸ However, Indiana’s FAFSA-filing rate has remained **below** target goals set by the Commission.
WHERE WE STARTED

▸ According to NCAN, Hoosier students from the class of 2022 left $70 million on the table simply by not completing the FAFSA.

▸ Indiana finished 40th nationally for FAFSA filing for the class of 2022.
FAFSA percentages across the state have rebounded, but still trail pre-pandemic levels.

Schools with more free and reduced lunch students, rural schools, and schools that enroll larger populations of students of color have experienced greater declines in FAFSA filing.

These declines mirror the decline in postsecondary enrollment for short-term certificates to four-year degrees.
CALL TO ACTION

- Failure to address this issue will have a long-term impact on Indiana’s economy.

- In response, the Commission has strongly supported legislation aimed at making FAFSA filing a default option for Indiana students during successive legislative sessions.
Prior to the 2023 legislative session, bills centered on creating a FAFSA requirement passed one chamber but would fail afterwards in the House or Senate.

Progress was made in 2022 with the passage of Senate Enrolled Act (SEA) 82.

The bill originally included FAFSA requirement language, but this information was stricken by an amendment in the House Education Committee.
CALL TO ACTION

- SEA 82-2022 required the Commission to create a FAFSA Affirmation Form.

- The FAFSA Affirmation Form was built into the Commission’s Learn More Indiana webpage and shared with high schools.

- The form allows students and parents to submit requests to the Commission for assistance with filing the FAFSA.
During the 2023 legislative session, universal FAFSA legislation passed.

 SEA 167-2023 makes FAFSA filing a default option for high school seniors beginning with the class of 2024.

It includes broad opt-out provisions:

- Parents or emancipated students can opt out of filing.
- A high school can waive the requirement after April 15, Indiana’s priority deadline for financial aid, if the school has made two reasonable attempts to contact the student and/or parent.
IMPLEMENTATION EFFORTS

- The Commission implemented efforts for SEA 167-2023.
  - Last year, an official form was created for parents or emancipated students to individually opt-out.
  - Additionally, a widget was made available after April 15 in ScholarTrack, Indiana’s one-stop-shop for state financial aid, through which high schools can submit batch uploads of students to opt out of filing the FAFSA after two reasonable attempts have been made to contact them.
There is evidence that SEA 167-2023 will help reverse current FAFSA-filing trends based on results in other states with similar legislation.

After the implementation of a universal FAFSA requirement:

- Alabama jumped from 34th to 9th and Texas rose from 23rd to 5th nationally for the percent of high school seniors who filed the FAFSA.
WHERE WE ARE
## OUR 2024-2025 JOURNEY

### JOURNEY TO TOP 10

<table>
<thead>
<tr>
<th>State</th>
<th>Current Ranking</th>
<th>Current % Seniors Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tennessee</td>
<td>1</td>
<td>56.0%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>2</td>
<td>53.8%</td>
</tr>
<tr>
<td>Illinois</td>
<td>3</td>
<td>53.2%</td>
</tr>
<tr>
<td>Texas</td>
<td>4</td>
<td>51.3%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>5</td>
<td>49.6%</td>
</tr>
<tr>
<td>Delaware</td>
<td>6</td>
<td>49.4%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>7</td>
<td>47.9%</td>
</tr>
<tr>
<td>California</td>
<td>8</td>
<td>47.7%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>9</td>
<td>47.1%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>10</td>
<td>47.1%</td>
</tr>
</tbody>
</table>

**Indiana** | 15 | 43.4%

### Year/Year % Change for Completions

<table>
<thead>
<tr>
<th>State</th>
<th>Current Ranking</th>
<th>Year/Year % Change for Completions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indiana</td>
<td>1</td>
<td>-2.1%</td>
</tr>
<tr>
<td>North Dakota</td>
<td>2</td>
<td>-7.4%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>3</td>
<td>-10.9%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>4</td>
<td>-11.7%</td>
</tr>
<tr>
<td>Oregon</td>
<td>5</td>
<td>-11.9%</td>
</tr>
<tr>
<td>Virginia</td>
<td>6</td>
<td>-12.4%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>7</td>
<td>-12.4%</td>
</tr>
<tr>
<td>Ohio</td>
<td>8</td>
<td>-12.6%</td>
</tr>
<tr>
<td>California</td>
<td>9</td>
<td>-12.8%</td>
</tr>
<tr>
<td>Utah</td>
<td>10</td>
<td>-12.9%</td>
</tr>
</tbody>
</table>
## FAFSA Requirement States

<table>
<thead>
<tr>
<th>State</th>
<th>FAFSA Year Requirement</th>
<th>Current Ranking</th>
<th>Current % Seniors Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Louisiana</td>
<td>2017-2018 school year</td>
<td>2</td>
<td>53.8%</td>
</tr>
<tr>
<td>Illinois</td>
<td>2020-2021 school year</td>
<td>3</td>
<td>53.2%</td>
</tr>
<tr>
<td>Texas</td>
<td>2021-2022 school year</td>
<td>4</td>
<td>51.3%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>2023-2024 school year</td>
<td>5</td>
<td>49.6%</td>
</tr>
<tr>
<td>California</td>
<td>2022-2023 school year</td>
<td>8</td>
<td>47.7%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>2023-2024 school year</td>
<td>13</td>
<td>43.6%</td>
</tr>
<tr>
<td>Indiana</td>
<td>2023-2024 school year</td>
<td>14</td>
<td>43.4%</td>
</tr>
<tr>
<td>Alabama</td>
<td>2021-2022 school year</td>
<td>15</td>
<td>43.4%</td>
</tr>
<tr>
<td>Maryland</td>
<td>2022-2023 school year</td>
<td>22</td>
<td>41.5%</td>
</tr>
<tr>
<td>Nebraska</td>
<td>2024-2025 school year</td>
<td>30</td>
<td>39.1%</td>
</tr>
<tr>
<td>Kansas</td>
<td>2027-2028 school year</td>
<td>37</td>
<td>36.9%</td>
</tr>
<tr>
<td>Colorado</td>
<td>2021-2022 state fiscal year</td>
<td>41</td>
<td>33.8%</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>2024-2025 school year</td>
<td>45</td>
<td>31.4%</td>
</tr>
</tbody>
</table>
SCHOLARTRACK

▸ ScholarTrack is the Commission’s one-stop shop to providing financial aid:

▸ Students can apply for financial aid program and view their FAFSA status.

▸ College financial aid advisors has access to view, claim, and report financial aid data regarding students are their campuses.

▸ High school guidance counselors can view student data, including the 21st Century Scholarship status and FAFSA filing status for their students.

▸ Community partners can see student data for the schools/organizations that serve.

▸ ScholarTrack cost for updating and maintenance:

▸ Bi-weekly sprint meetings to discuss updates and bug-fixes
Richard M. Fairbanks Grant

- College Matters seeks to increase college enrollment rates among Marion County high school seniors, especially among students from low-income households who are less likely than their higher-income peers to enroll.

- Through grants to schools, community-based organizations and the Indiana Commission for Higher Education, College Matters seeks to connect high school students – and their families – with the support they need to file the Free Application for Federal Student Aid, access financial aid and enroll in college.

- To help add short-term capacity during the initial implementation of Indiana’s new FAFSA mandate, College Matters awarded $2.6 million in grants to allow 26 Marion County public high schools within 14 school corporations to assist students and their families in meeting this new requirement.
College Success Program Grant

- HEA 1001-2023 appropriated $5M to be used for college success programs, specifically College Success Coaches, to support 21st Century and First-Generation students.

- College Success Coaches assist with the following:
  - Academic Advising
  - ScholarTrack Support
  - Financial aid support (FAFSA submission)
  - Pre-admissions
OUTREACH & PARTNERSHIPS

- Learn More Indiana supported partner social accounts including INVESTEd and the Indiana Latino Institute (ILI).

- With the help of both partners, LMI shared FAFSA filing events available to students around the state and filing support contact information.

- LMI also participated in a total of three Facebook Live events with both ILI and INVESTEd.

- We sent out 20 specific FAFSA filing emails to unique and overlapping populations of students both high school seniors and continuing students.

  - Learn More Indiana began posting “FAFSA Friday” posts as a part of the #Destination FAFSA Campaign

  - Post topics included opening updates, vocabulary changes, document preparation, and filing event opportunities
CHALLENGES

Implementation

▸ Operationalizing opt-out provisions
▸ Misperceptions of the potential increased workload
▸ Challenges of the simplified FAFSA roll out

Outreach

▸ Access to school or personal email addresses for students
  ▸ Firewalls (We are currently working on a campaign to request that our IN.GOV email addresses are safe listed)
UNIVERSAL FAFSA

RECOMMENDATIONS

▸ Framing is critical

▸ Creating partnerships with schools both K-12 and higher education institutions.

▸ Community organization partnerships for events and outreach.

▸ Communicate how financial aid opportunities from the FAFSA and college enrollment can support each other

▸ Reach out to States who have had FAFSA legislation passed
ANGEL MCALLISTER
Director for State Financial Aid
Email: Amcallister@che.in.gov

KATE MARLING
Postsecondary Transitions Manager
Email: Kmarling@che.in.gov
INDIANA COMMISSION for HIGHER EDUCATION