

**Joseph P. Pettibon II**

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**Professional Preparation**

Bachelor of Science, Computer Science, Texas A&M University (1993)  
Management Development Program, Harvard University (2005)  
Project Management Training, American Management Association (2002)  
Leadership Institute, Texas A&M University (2001)

**Professional Appointments**

Texas A&M University, Scholarships & Financial Aid, College Station, TX  
2005-Present Assistant Provost  
2003-2005 Director of Student Financial Aid  
2001-2003 Director, Information Technology  
1995-2001 Computer Systems Systems Analyst  
1994-1995 Programmer/Analyst I  
US Army Test and Experimentation Command, Ft. Hood, TX  
1989-1994 Computer Specialist (Student Trainee)

**Areas of Professional Interest/Expertise:** financial aid, leadership, management, employee development, technology utilization, process improvement, and access and affordability

**Current Employment/Responsibilities:** Lead and oversee the university's \$492 million scholarships and financial aid programs, including federal and state aid programs, veterans benefits, athletic grant-in-aid, student employment, short term loans, and some institutional scholarships; manage 100 employees in College Station and regional prospective student centers; serve on committees, including Tuition Policy Advisory Committee.

**Professional Involvement**

NASFAA (National Association of Student Financial Aid Administrators), 1998-2010  
SWASFAA (Southwest Association of Student Financial Aid Administrators), 1998-2010  
TASFAA (Texas Association of Student Financial Aid Administrators), 1994-2010  
President-Elect, 2009-2010  
Texas Higher Education Coordinating Board Financial Aid Advisory Committee, 2005-2010  
ApplyTexas Redesign Subcommittee, 2008  
TG Lender/School Advisory Committee, 2003-2009  
SETA (SCT Education Technology Association, formerly SISU), 1995-2003  
Council of Public University Presidents and Chancellors' Enrollment Services Efficiency Committee, 2006-2012

# STATE AND INSTITUTIONAL FINANCIAL AID

Joe Pettibon  
Assistant Provost  
Texas A&M University

## State and Institutional Programs

- ▣ Review Today:
  - Grants: Texas Grant, TEOG Grant, TEG Grant, TPEG Grant, Institutional Grants
  - Scholarships: Top 10% Scholarship
  - Loans: College Access Loan Program, B-on-Time Student Loan Program
  - Work-Study: State and Institutional
- ▣ Other Programs Not Discussing Today:
  - Repayment Programs
  - Tuition Exemptions/Waivers

Texas Grant  
Towards Excellence, Access and Success

- ▣ Who is eligible, initial year requirements - Freshmen
  - Texas residents
  - Show Financial Need – currently \$4000 or less Expected Family Contribution (EFC)
  - Have not been convicted of a crime involving a controlled substance
  - Register for the Selective Service or are exempt
  - Be a graduate of an accredited high school in Texas not earlier than the 1998-99 school year

Texas Grant  
Towards Excellence, Access and Success

- Complete the Recommended High School Program or Distinguished Achievement Programs in high school
- Enrolled in a non-profit public college or university in Texas within 16 months of graduation from a public or accredited private high school in Texas
- Have accumulated no more than 30 semester credit hours, excluding those earned for dual or concurrent courses or awarded for credit by examination (AP, IB, or CLEP)

Texas Grant  
Towards Excellence, Access and  
Success

- ▣ Who is eligible, initial year requirements –  
Transfer Student
  - Have earned an Associate's degree from a public technical, state or community college in Texas, and
  - Enroll in any public university in Texas no more than 12 months after receiving their Associate's degree.

Texas Grant  
Towards Excellence, Access and Success

- ▣ Continuing Eligibility
  - End of first year, meet institution's satisfactory academic progress requirements
  - End of other years, maintain an overall 2.5 GPA, complete 75% of the hours attempted and complete 24 hours in the previous award year
  - Can receive awards up to 150 semester credit hours, for 5 years for a 4-year degree plan or 6 years if enrolled in a 5-year plan, or until they receive a bachelor's degree, whichever comes first

## Texas Grant

### Towards Excellence, Access and Success

- ▣ Grant Maximums for the 2010-11 Award Year
  - \$6780/year – public university students
  - \$1780/year – public community college students
  - \$3150/year – public technical college students
- ▣ Universities and colleges are required to cover all tuition and fees for students receiving the Texas Grant
  - Amounts range depending on tuition and fee charges at each institution
  - Utilize Federal, State and/or Institutional Grants and scholarships

## Texas Educational Opportunity Grant Program (TEOG)

- ▣ Eligibility – initial year requirements:
  - Are Texas residents
  - Show financial need - \$2000 or less EFC
  - Register for the Selective Service or are exempt from this requirement

## Texas Educational Opportunity Grant Program (TEOG)

- Are enrolled at least ½ time (6 semester credit hours) in the first 30 hours (or their equivalent) in an associate's degree or certificate program at a public two-year college in Texas
- Have not been granted an associate's or a baccalaureate degree
- Have not been convicted of a felony or a crime involving a controlled substance

## Texas Educational Opportunity Grant Program (TEOG)

- ▣ Continuing Eligibility
  - Students who continue in college and who meet program academic standards can receive awards for up to 75 semester credit hours, for 4 years, or until they receive an associate's degree, whichever comes first
- ▣ Award Amounts
  - Award amount is equal to the student's tuition and required fees. (For 2010-11, this amount is approximately \$3390 per semester for public state college students, \$890 per semester for public community college students, and \$1575 per semester for public technical college students)

## Tuition Equalization Grant Program (TEG)

- ▣ Grant aid to financially needy students at private, non-profit colleges or universities
- ▣ Who is Eligible?
  - Texas residents or are non-resident National Merit Finalists
  - Show financial need
  - Enrolled in an eligible institution in Texas in a degree plan leading to a first associate's baccalaureate, master's or doctoral degree
  - If awarded 1<sup>st</sup> TEG prior to 9/1/05 – meet academic progress requirements of institution
  - If awarded 1<sup>st</sup> TEG on or after 9/1/05 – earn and maintain overall GPA of 2.5 on scale of 4/0 and complete at least 24 credit hours per year (18 per year if graduate student)

## Tuition Equalization Grant Program (TEG)

- Enroll on at least a ½ time basis if award prior to 9/1/05
- Enroll on at least a ¾ basis if awarded on or after 9/1/05
- Not receiving athletic scholarships
- Required to pay more tuition than they would pay to attend a public institution
- Register for the Selective Service or are exempt from this requirement
- ▣ Award Amounts
  - Maximum is \$3808 per school year. Students with exception need (EFC less than or equal to \$1000) may receive awards of up to \$5712 in a year.

## Texas Public Education Grant (TPEG)

- ▣ Funds are provided from public colleges and universities own resources – set asides from Statutory Tuition
- ▣ Who is eligible?
  - Texas residents, non-residents or foreign students
  - Show financial need
  - Register for the Selective Service or are exempt from this requirement
- ▣ Each institution sets its own priorities in making awards to undergraduates and/or graduate students; full and part time
- ▣ Award amounts will vary at each institution

## Top 10% Scholarship Program

- ▣ Who is Eligible?
  - Texas resident
  - Demonstrate financial need (to be determined by the college or university financial aid office)
  - Complete a 2010-11 FAFSA or TASFAA (if applicable) and file by March 1, 2010
  - Complete Recommended or Distinguished Achievement High School curriculum
  - Rank in the top 10% (as of his/her 7<sup>th</sup> semester or 6<sup>th</sup> if the college uses that semester for admissions)
  - Graduate from an accredited high school in Texas
  - Enroll full-time in a Texas public 2-year or 4-year college or university in Fall 2010



## Top 10% Scholarship Program

- ▣ Renewal Requirements (contingent upon available funding)
  - Complete 30 semester credit hours (SCH) in the previous year
  - Maintain cumulative 3.25 GPA (or 3.0 GPA in shortage fields)
  - Complete at least 75% of hours attempted
- ▣ Award amount - \$2000 Scholarship – fall semester only
  - Additional \$2000 Scholarship for juniors and seniors in shortage fields

## College Access Loan Program (CAL)

- ▣ Alternative education loans to Texas students who are unable to meet the cost of attendance
- ▣ Annual loan amounts – up to the cost of attendance less other financial aid
- ▣ Interest Rate – fixed annual rate of 6%
- ▣ 6 month grace period, 10 year repayment period

## College Access Loan Program (CAL)

- ▣ Eligibility Requirements include:
  - Be a Texas resident
  - Be enrolled at least ½ time in a course of study leading to an associate's, bachelor's, graduate or higher degree or be enrolled in an approved Alternative Educator Certification Program
  - Meet the Satisfactory Academic Progress requirements set by the institution
  - Receive a favorable credit evaluation or provide a cosigner who has good credit standing and meets other requirements

## Texas B-on-Time Student Loan Program

- ▣ No interest loans and potentially have entire loan amount forgiven upon graduation
- ▣ Eligibility requirements include:
  - Completed a FAFSA and be eligible to receive federal financial aid
  - Be enrolled full-time in an undergraduate degree or certificate program at an eligible institution
  - Be a Texas resident or be entitled to pay resident tuition rates as a dependent child of a member of the US armed forces and
  - Have graduated in the 2002-03 academic year or later from a high school operated by the US Department of Defense or under the recommended high school program from a public or accredited private high school in Texas or
  - Have earned an associate's degree from an eligible institution no earlier than May 1, 2005

## Texas B-on-Time Student Loan Program

- ▣ Annual loan amounts for 2010-11 – same as Texas Grant
- ▣ Renewal Eligibility – same as Texas Grant
- ▣ Limited appropriations = limited awards to students
- ▣ Forgiven loans must be reported to the IRS as taxable income

## Texas B-on-Time Student Loan Program

- ▣ Loan shall be forgiven if the student receives an undergraduate degree or certificate from an eligible institution and the student either:
  - Graduated with a cumulative GPA of at least a 3.0 within
    - ▣ 4 calendar years after the date the student initially enrolled in an eligible institution
    - ▣ 5 calendar years after the date the student initially enrolled in an eligible institution, if the degree is in architecture, engineering, or any other program determined by the board to require more than 4 years to complete or
    - ▣ 2 calendar years after the date the student initially enrolled in a public or private 2-year institutions
  - Graduated with a cumulative GPA of at least 3.0, with a total number of credit hours that is no more than 6 hours beyond what is required to complete the degree or certificate

## Texas College Work-Study Program

- ▣ Eligibility Requirements include:
  - Texas residents
  - Show financial need
  - Register for the selective service or exempt
  - Enroll at least half-time
- ▣ Public and private, non-profit colleges or universities in Texas may participate
- ▣ Award amount determined by each institution

## University Programs

- ▣ Designated Tuition Set-Asides
- ▣ Endowed and Private Donor Scholarships
- ▣ Academic Scholarships
- ▣ Athletic Scholarships
- ▣ Tuition Remission
- ▣ Institution Student Employment/Work Study
- ▣ Assistantships

# Questions

