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# A “New” OTAG for 2022-23

## Oklahoma Tuition Aid Grant Program

December 3, 2021



# Zoom Notes

- Participants are muted except for host and moderator.
- Questions will be fielded through Zoom chat box. This can be done throughout the presentation.
- The zoom workshop will be recorded. A zoom link to the recording will be sent to registrants early next week.



# Background

- OTAG is largely unchanged since 1983. The \$1,000 maximum award for public college and career tech students has been the same since 1983.
- Awarded on a “first come, first served” basis (earliest FAFSA filers).



# Background

- Though focused on lowest income students (1700 EFC), did not consider the level of unmet financial need.
- In 2020-21 about 40% of OKPromise recipients also received OTAG.



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# Goals of Changes

- HB 1821 passed in 2021 session.
- Increased retention and graduation/completion rates.
- Focus on areas of high employment demand.



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# Administration: Centralized vs. Decentralized

- Funding
- Eligibility requirements
- Awarding Decisions

# Administration



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<b>Centralized</b>	<b>Decentralized</b>
<ul style="list-style-type: none"><li>• <b>Old OTAG</b></li><li>• <b>Oklahoma's Promise</b></li><li>• <b>Academic Scholars Program</b></li></ul>	<ul style="list-style-type: none"><li>• <b>New OTAG</b></li><li>• <b>FSEOG</b></li><li>• <b>Ok. Tuition Equalization Grant (OTEG)</b></li></ul>



# Allocation of Funds

Old	New
<ul style="list-style-type: none"><li>• <b>Funding followed individual award recipients.</b></li></ul>	<ul style="list-style-type: none"><li>• <b>Each institution will be allocated a % of total funding based on 2019-20 actual expenditures. (see handout)</b></li></ul>



# Student Eligibility



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Old	New
<ul style="list-style-type: none"><li>• <b>EFC (Expected Family Contribution) of 1700 or less</b></li><li>• <b>Date of FAFSA submission</b></li><li>• <b>OK resident</b></li></ul>	<ul style="list-style-type: none"><li>• <b>Pell Eligibility</b></li><li>• <b>OK resident</b></li></ul>

# Awarding Priorities



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<b>Old</b>	<b>New</b>
<ul style="list-style-type: none"><li>• <b>Lowest EFC</b></li><li>• <b>Earliest FAFSA submission.</b></li></ul>	<ul style="list-style-type: none"><li>• <b>Unmet financial need</b></li><li>• <b>Employment demand</b></li><li>• <b>Nearness to completion</b></li><li>• <b>Continuous enrollment</b></li></ul>

# Award Amounts



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Old	New
<ul style="list-style-type: none"><li>• <b>Statutory limit of 75% of tuition and fees.</b></li><li>• <b>Public colleges &amp; career tech: \$200 - \$1,000</b></li><li>• <b>Private/Independent: \$200 - \$1,300</b></li></ul>	<ul style="list-style-type: none"><li>• <b>Statutory limit of 75% of tuition and fees.</b></li><li>• <b>2-Year Colleges &amp; Career Tech: \$200 - \$1,500</b></li><li>• <b>Regional U's: \$200 - \$2,000</b></li><li>• <b>Research U's: \$200 - \$3,000</b></li></ul>



# Other Awarding Guidance

- Generally limit awards per semester/enrollment period to the % of annual enrollment.
  - 50% fall semester / 50% spring semester
  - Possibly adjust for other lengths of enrollment
  - Can be used for summer enrollment (claims must be submitted by June 30)

# Application Deadline



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<b>Old</b>	<b>New</b>
<ul style="list-style-type: none"><li>• <b>Statewide deadline announced in June based on available funding.</b> <b>Feb. 5, 2021</b> <b>Jan. 15, 2020</b> <b>Jan. 31, 2019</b> <b>Jan. 15, 2018</b></li></ul>	<ul style="list-style-type: none"><li>• <b>Institutions may set their own deadlines.</b></li></ul>



# Other Differences

<b>Old</b>	<b>New</b>
<ul style="list-style-type: none"><li>• <b>Portable to another institution within same award year</b></li></ul>	<ul style="list-style-type: none"><li>• <b>Institution discretion to award transfer students.</b></li></ul>



# Payment Process

- Schools will retrieve a blank award claim form from the resources page (similar to current format but adding amounts).
- Schools will select recipients and set amounts.
- Schools will submit completed award claim form(s) through O-SAFE.
- Schools should try to distribute funds evenly among terms with a planned deadline for claims submission of June 30<sup>th</sup>. Funds may not be carried over to following year (“use it or lose it”).



# Payment Process

- OSRHE will process the claim, begin the payment process, and send a disbursement roster to the school.
- Payment will be made to the school on the student's behalf.
- A reconciliation will be required.
- Institutions will be responsible for selecting, packaging and notifying student recipients.





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# Timeline

- Now and near future – Institutional planning, deciding priorities for 2022-23
  - What programs at your institution have the highest employment demand?
  - Identifying students not receiving other aid – state, institutional, other, etc.



# Timeline

- Identify students who have been continuously enrolled and those near to degree/certificate completion.
- Identifying students in danger of dropping out without additional aid.
- Address special circumstances? Late enrollment, nontraditional enrollment periods, etc.



# Timeline

- May 2022 – State funding level of OTAG set by Legislature/State Regents (current funding is \$15 million). Institutions will be notified of their allocation for 2022-23 soon thereafter.
- Fall 2022 – first awards under “New” OTAG

# Contacts

Irala Magee, Assistant Vice Chancellor for Scholarships and Grants

[imagee@osrhe.edu](mailto:imagee@osrhe.edu); (405) 225-9378

Jess Tucker, Scholarships & Grant Specialist II

[jtucker@osrhe.edu](mailto:jtucker@osrhe.edu); (405).225.9488

Bryce Fair, Associate Vice Chancellor for Scholarships and Grants

[bfair@osrhe.edu](mailto:bfair@osrhe.edu); (405) 225-9162



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