

NOTICE OF PUBLIC MEETING

The Academic and Student Affairs Committee of the Board of Trustees of the University of Oregon will hold a meeting on the date and at the location set forth below. Subjects of the meeting will include: an overview of UO's College of Arts and Sciences, a report from the Provost, a presentation on the College of Education institutional plan for educator equity in teacher preparation; and a report on the federal application for student financial aid.

The meeting will occur as follows:

Monday, June 3 at 1:00 p.m. Pacific Time
Ford Alumni Center, Giustina Ballroom

The meeting will be webcast, with a link available at <https://trustees.uoregon.edu/meetings>.

Sign language for the deaf or hard of hearing should be requested at least 48 hours in advance of the posted meeting time by contacting Jennifer LaBelle at (541) 346-3166 or emailing trustees@uoregon.edu. Please specify the sign language preference.

BOARD OF TRUSTEES

6227 University of Oregon, Eugene OR 97403-1266 T (541) 346-3166 trustees.uoregon.edu

An equal-opportunity, affirmative-action institution committed to cultural diversity and compliance with the Americans with Disabilities Act

Board of Trustees | Academic and Student Affairs Committee
Public Meeting | June 3 | 1:00 p.m.
Ford Alumni Center | Eugene Campus

Convene

- Call to order, roll call

- 1. Provost's Report.** Karen Ford, interim Provost and Executive Vice President.
- 2. School/College in Focus: The College of Arts and Sciences.** Chris Poulsen, Dean, College of Arts and Sciences
- 3. College of Education's Institutional Plan for Educator Equity in Teacher Preparation - Update:** Laura Lee McIntyre, Dean of the College of Education; Dianna Carrizales-Engelmann, Assistant Dean for Administration.
- 4. Update on the Free Application for Federal Student Aid.** Roger Thompson, Vice President for Student Services and Enrollment Management; Jim Brooks, Associate Vice President for Student Services and Enrollment Management and Director of Financial Aid and Scholarships.

Meeting Adjourns

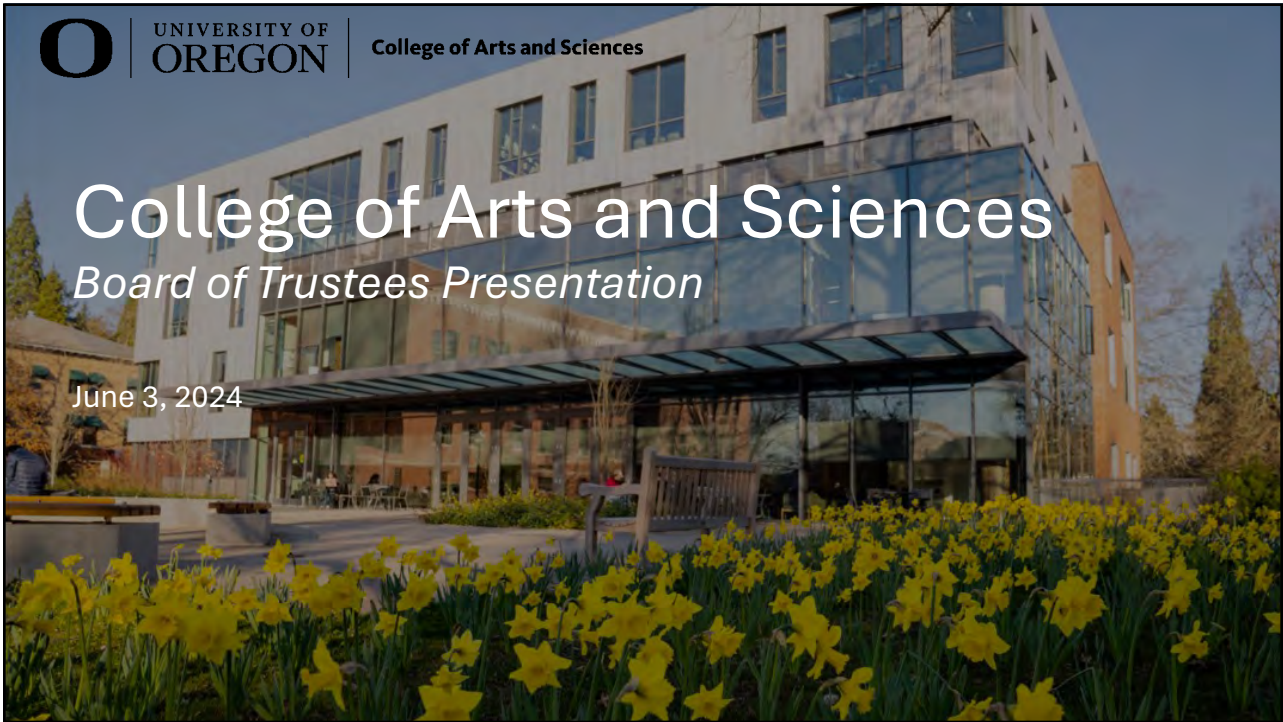
Agenda Item #1

Provost's Report

THERE ARE NO MATERIALS FOR THIS AGENDA ITEM

Agenda Item #2

College of Arts and Sciences




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UNIVERSITY OF OREGON | College of Arts and Sciences

Liberal arts college in an R1 university

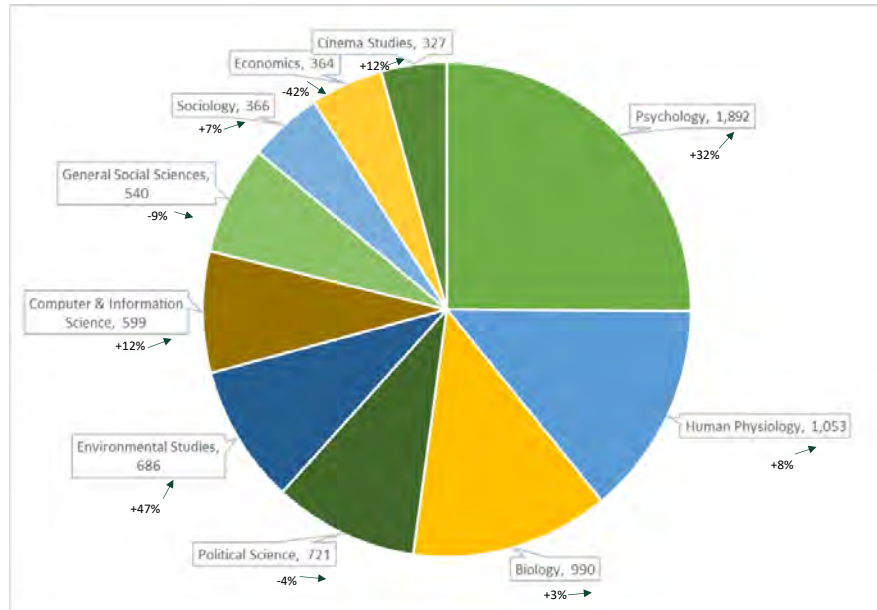
The College of Arts and Science (CAS) is committed to offering an inspired, forward-looking, inclusive liberal arts education that prepares students for a life of purpose and well-being while maximizing the opportunities afforded by a research-intensive university.

50+ majors/ 69 minors	10,000+ undergraduate students	36% BIPOC students	22% Pell eligible students	22% first gen students
1 Rhodes Scholar; 2 finalists in 2023	 Nayantara Arora, UO's first female Rhodes Scholar	36 masters/ 25 PhD programs	1,200+ masters and PhD students	51% of UO undergrad students are CAS majors

And CAS has 65% of UG SCH

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Top 10 CAS Majors



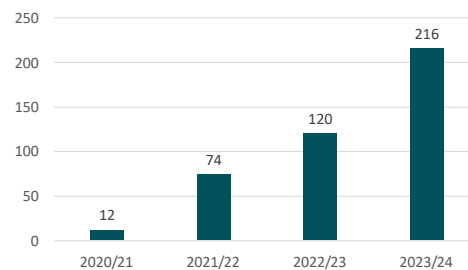
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Training Students for the Future



- Data Science major
- Cybersecurity major
- Materials Science & Technology major (coming soon)
- School of Computer and Data Sciences
- School of Global Studies and Languages

Data Science Majors 2020-2023



4



Maximizing Experiential Learning

CAS Hands-on Learning: CAS scholarship provides financial support of up to \$5,000 to assist students in completing an unpaid summer internship, research opportunity, or service-learning experience of at least 8 weeks' duration. (Preference given to students with need.)

Environmental Leadership Program: A collaborative service-learning program where students are matched into teams with non-profit organizations, governmental agencies and businesses to address local environmental needs.

Oregon Institute of Marine Biology: Offers hands on learning to both majors (via the only undergraduate program in Marine Biology in the Pacific Northwest) and non-majors (via a new "Oregon study abroad" year-long experience available to all UO students.

Kidd Creative Writing Workshop: A unique yearlong studio experience in which students pursue their passion for creative writing in fiction or poetry. Alumni Nathan Harris is an NYT bestselling author!

Prison Education Program: Offers classes and not-for-credit opportunities for people who are incarcerated statewide, including a hybrid class where nonincarcerated students attend class in prison with incarcerated students. One incarcerated student earned a bachelor's degree!

Earth Sciences Field Camps: Two-week field camps exploring wildlands in Oregon and the broader American west.

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Student Success through Tykeson Advising

- Moved from Undergraduate Education and Student Success to CAS in fall 2023.
- Serves students considering majors in CAS.
- A professional team of area specialists.
- Integrated academic and career advising.
- Works closely with faculty advisors in departments.
- Upcoming: Create an experiential learning hub.



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Excellent Faculty, Impactful Research

Our faculty research is leading-edge, interdisciplinary, and tackles society's most pressing issues.

750+ faculty members

160 new sponsored research projects

605 active sponsored research projects

\$87.2 million in new + committed awards

24 NSF Career Award winners since 2018

5 members of the National Academy of Sciences



10 members of the American Associate for the Advancement of Science

Judith Eisen
Biology Department Head and Professor
2024 National Academy of Sciences Member



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Research for a Better World

- Bringing ethical considerations to discussions about AI and data (Colin Koopman, Professor of Philosophy)
- Excavating Pompeii (Kevin Dicus, Associate Professor of Classics)
- Bringing entertainment to the world, and teaching our students how to do the same (Mat Johnson, Philip K. Knight Chair in Creative Writing and English)
- Quantitatively evaluating inequalities (Clare Evans, Associate Professor of Sociology)
- Preserving Mesoamerican languages in Oregon (Lynn Stephen, Professor of Anthropology)
- Connecting experts in economics, data science, and environmental sciences to regulatory agencies that do the work (Ed Rubin, Assistant Professor of Economics, and founder of TWEEDS)
- Forecasting earthquakes and helping communities prepare (Cascadia Region Earthquake Science Center)
- Breaking the pattern of intergenerational trauma (Maureen Zalewski, Associate Professor of Psychology)
- Creating new nanomaterial (Ramesh Jasti, Professor of Chemistry)
- Determining how octopuses see (Cris Niell, Professor of Biology)

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The CAS Plan...

1. Education for a complex and changing world
 - a. Deliver on the promise of a 21st century liberal arts education
 - b. Solidify an integrated model of advising that centers the whole student
 - c. Improve the graduate student experience
2. Impactful scholarship
 - a. Increase awareness around the College's tradition of innovation
 - b. Capitalize on areas of existing strength
 - c. Elevate collaboration and interdisciplinarity to propel positive impact
3. A culture of belonging and well-being
 - a. Create a "culture of stay" where CAS is the preferred place to work and learn
 - b. Embrace a culture of meaningful collaboration and focused, high-value work



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Integrated Career Readiness

1. Invest in a team that can focus on career readiness
2. Integrate support throughout all students' time with us
 - Begin career readiness coaching and offer students support from the very beginning – even in the welcome letter and orientations
 - Integrate career readiness in academic courses
 - Embed experiential learning in all students' degree programs
 - Tie transferable skills into core education requirements
 - Create strong student-alumni connections
3. Work with units across campus to increase career readiness efforts all over, not just centrally and not just in CAS
4. Focus on industry specialized advising
5. Increase accessibility
6. Create a communication plan and incorporate this into our strategic plan



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Challenges & Opportunities

In CAS, we love challenges. Our top 5...

1. Developing a distinctively Oregon liberal arts core education for the future
2. Growing and supporting student experiential learning and career preparation
3. Attracting and retaining the best faculty
4. Growing our STEM faculty
5. Raising the quality of our classrooms and labs to match the quality of our students and faculty



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Raising the Visibility of CAS

We are building our CAS communications and marketing infrastructure, including expanding our website; rebranding 60+ department websites; launching a bi-monthly digital newsletter, and expanding social media.

CAS WEBSITE

You Have Questions. The Dean Has Answers.

From May 2023 to May 2024

920K PAGE VIEWS

240K ANNUAL VISITORS

+45% TRAFFIC INCREASE

29K MONTHLY VISITORS

CAS CONNECTION NEWSLETTER

CAS SOCIAL MEDIA

Since October 2023

- +102%** LINKEDIN FOLLOWERS
- +58%** INSTAGRAM ENGAGEMENTS
- +37%** INSTAGRAM FOLLOWERS

CAS DEPARTMENT WEBSITES

Mathematics

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UNIVERSITY OF
OREGON

**College of
Arts and Sciences**

What can you do with a degree from CAS?

CAS alumni include:



NASA researcher

Charity Woodrum
Physics, 2018



Oscar-nominated filmmaker

Skye Fitzgerald
Theatre Arts, 1997



Oregon State Representative

Andrea Valderrama
Romance Languages, 2015



Actress

Kaitlin Olson
Theatre Arts, 1997



Data science lead for Merck

Bennet Vorhees
Chinese and Economics, 2009



Rhodes Scholar

Nayantara Arora
Neuroscience in CAS and the Clark Honors College, 2023

And many, many more!



SPOTLIGHT ON CAS

Top 10 Undergrad Majors at the College of Arts and Sciences

The College of Arts and Sciences (CAS) is the largest college within the University of Oregon, and consists of three divisions – humanities, natural sciences and social sciences – and two schools – the School of Computer and Data Sciences and the School of Global Studies and Languages.

CAS by the Numbers

10.1K

TOTAL STUDENTS

50+

MAJORS

69

MINORS

25

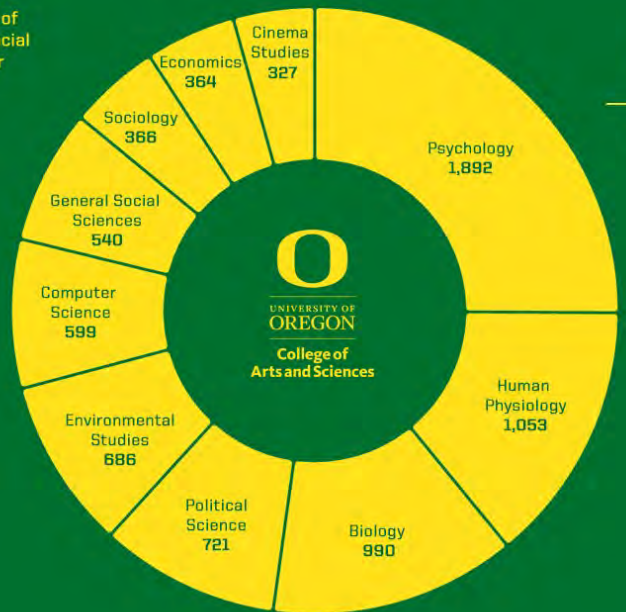
PHD PROGRAMS

36

MASTERS PROGRAMS

995

COURSES



STUDENTS ENROLLED AS OF OCT. 2023

Strategic Priorities

1. Education for a complex and changing world.

- a. **Deliver on the promise of a 21st century liberal arts education.** Partner with campus leaders, peers, and stakeholders to articulate the essential liberal arts principles that animate University of Oregon's Core Education Program. Champion the relevance of these principles in preparing UO students for a lifetime of impact as global citizens, equipped to address pressing problems in a shifting contemporary context. Expand opportunities for experiential learning.
- b. **Solidify an integrated model of advising that centers the whole student.** Build on the good work already underway to refine the UO model of academic and career advising to ensure that undergraduate and graduate students are both well-supported in moving through their chosen curricula, and well-prepared for the future upon graduation.
- c. **Improve the graduate student experience.** Conduct a thoughtful and rigorous programmatic evaluation of CAS graduate programs and take action to remove barriers to degree progression in the interest of upholding graduate students' financial and emotional well-being. Increase emphasis on the College's role in preparing graduate students to contribute as scholars and professionals.

2. Impactful scholarship.

- a. **Increase awareness around the College's tradition of innovation.** Accelerate efforts to publicize the impact of cutting-edge research that builds on our history of scholarly leadership and creativity. Raise visibility around the value of a University of Oregon liberal arts education.
- b. **Capitalize on areas of existing strength.** Invest in areas where CAS has established - or is well-positioned to develop - a national reputation (e.g., the environment, neuroscience, _____, _____, _____). Engage CAS departments and other schools and colleges to identify hiring priorities in key areas that will have a multiplying effect on our research impact and standing.

- c. **Elevate collaboration and interdisciplinarity to propel positive impact.** Pursue new ways of supporting and promoting scholarship and innovation through partnerships: within the College, across the University, and beyond (with the city, state, other higher ed institutions, and private sector) to make positive change. Embrace public scholarship and public engagement.
- 3. A culture of belonging and well-being.**
- a. **Create a “culture of stay,” where CAS is the preferred place to work and learn.** Put in place tailored and intentional structures to ensure that every member of the CAS community - especially those from traditionally underrepresented populations - feels safe and welcome, with the support necessary to pursue their educational, professional, and scholarly ambitions. Identify the root cause(s) where retention of students, staff, and/or faculty is a concern.
 - b. **Embrace a culture of meaningful collaboration and focused, high-value work.** Seek opportunities to remove siloes and increase collaboration between and among staff and faculty. Clarify roles and decision-making structures; streamline processes; and distribute service more equitably across CAS. Celebrate and institutionalize healthy norms around work-life balance. Seek to create space for each member of the CAS community to perform their most important work in an effective way.

Agenda Item #3

College of Education – Educator Equity Plan



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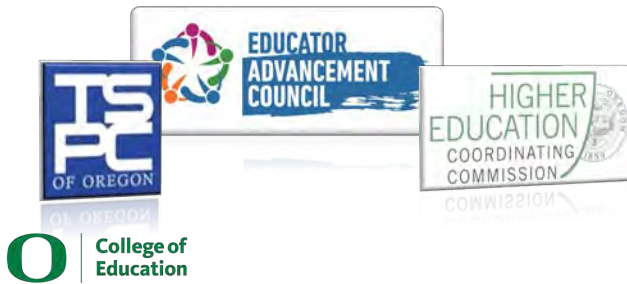
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College of Education Educator Equity Plan

Educator Equity Plan: Legislatively required plan developed every two years by each public university EPP which describes specific goals, strategies and deadlines for the recruitment, admission, retention and graduation of diverse educators to accomplish the goal described in ORS 342.437. Plans are reviewed and adopted by HECC (ORS 342.447).

Educator Preparation Programs also participating:

- University of Oregon
- Portland State University
- Oregon State University
- Eastern Oregon University
- Western Oregon University
- Southern Oregon University



Funding: Plan Years and Plan Investments Over Time

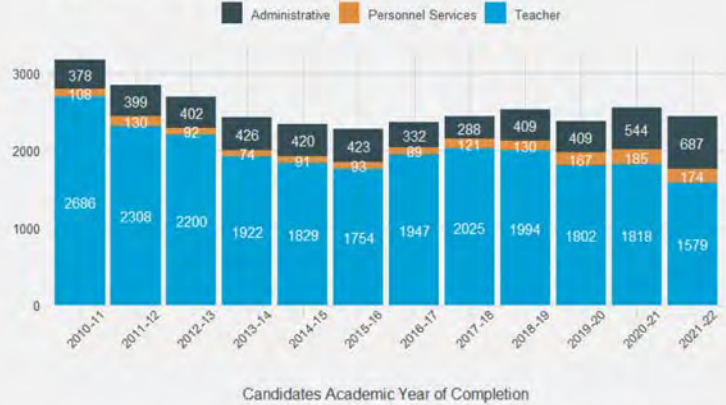
2015-2017-2019 \$0	2019-2021 \$83k	2021-2023 \$150k (+100)	2023-2025 150k	
2016-2018 Plan	2018-20 Plan	2020-22 Plan	2022-24 Plan	2024-26 Plan

Oregon K12 Summary Data



Metric 1: Program completion recommendations by licensure category

Oregon Educator Public Employment Profile Report



Data sources: OEPE data file | Produced by: Oregon Longitudinal Data Collaborative

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University of Oregon Educator Preparation Programs 2024

MUSIC EDUCATION

For more than two decades, 100 percent of UO music education graduates seeking employment as K-12 public school music teachers have received job offers upon graduation. Our alumni teach throughout the United States and internationally, including in China, Italy, Spain, and Vietnam. For future music teachers, a UO music education degree signals outstanding preparation through a rigorous and comprehensive program.

Undergraduate:

[Bachelor of Music in Music Education](#)

Graduate:

[Masters of Music in Music Education](#)

[Doctor of Philosophy in Music Education](#)

What can I do with a degree in Music Education?

The Music Education degree is designed to prepare students for all aspects of public, school music teaching. Our students exceed all state licensure requirements and have gone on to teach throughout Oregon, the US and even internationally. Nearly all of our education coursework is taught in the School of Music by music faculty with experience teaching in the public schools. No other university on the west coast, and few nationally, can offer this depth of instruction and context. Specific skills you will have gained from your degree in music or dance include:



GENERAL EDUCATION: UOTEACH



Elementary Multiple Subjects Oregon Teaching License



Middle High School Dual Subject Oregon Teaching License

UOTEACH Curriculum and Teaching MEd program is for people pursuing their preliminary Oregon teacher licensure and a master's degree. UOTEACH is ideal for candidates who aspire to pursue careers in elementary, or middle or high school learning communities.

SPECIAL EDUCATION

Our masters program offers master of arts, master of science, and master of education options with licensure coursework if you want to earn a teaching license with your degree. You can also add endorsement coursework in early intervention or K-12.

Master's + Licensure

Our **master's + licensure programs** prepare **preservice teachers** to meet the preliminary special education licensure requirements for Oregon in either:

- K-12/General Ed
- Early Intervention

Preservice teachers can complete coursework to meet the added endorsement requirements for these age groups, as well through our endorsement program.

Master's + K-12 Endorsement

Master's + Early Intervention Endorsement

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University of Oregon Educator Preparation Programs 2024

Row Labels	2017		2018		2019		2020		2021		2022		2023		Total N		Total Percent
	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent	
Other Students of Color	21	12.1%	33	18.9%	24	13.9%	33	17.7%	32	16.1%	26	14.3%	40	16.5%	209	15.7%	
Hispanic or Latino	20	11.6%	19	10.9%	21	12.1%	21	11.3%	17	8.5%	15	8.2%	35	14.4%	148	11.1%	
White	128	74.0%	118	67.4%	120	69.4%	127	68.3%	144	72.4%	131	72.0%	161	66.3%	929	69.8%	
Grand Total	173	100.0%	175	100.0%	173	100.0%	186	100.0%	199	100.0%	182	100.0%	243	100.0%	1331	100.0%	

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UO 2023-2025 Educator Equity Plan



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Cohesive Learning Institutes: Focus Area Preparation, Efficacy, Shared Language

Cohesive Learning Institutes: A set of cohesive learning institutes designed to bring shared language to educators across settings. Designed to provide insight into new information or address gaps. 2024 CLIs align with the newly mandated state standards for social and emotional learning.



2024-2025 CLIs will be offered to teacher candidates, their faculty supervisors, and the cooperating professionals who host our students in their classrooms. Structured like “book clubs” with facilitators.



In June 2023, the State Board of Education adopted the first [Oregon Transformative Social and Emotional \(TSEL\) Framework and Standards](#) that represent K-12 social and emotional learning expectations for students. Oregon's Transformative SEL Framework is intended to enact [ORS 329.045](#) and help build capacity for strengthening equity-focused school cultures that support student and adult wellbeing. Oregon's vision for SEL provides intentional focus on the social and emotional elements of learning, teaching, and cultivating affirming school cultures through a transformative approach that teaches to the whole child, builds on their strengths, perspectives, and contributions, and guides the interactions and relationships between students and adults. SEL equips students with the skills needed for college, career, and life.

According to [ORS 329.045](#): “The board shall require school districts to implement the standards and framework no later than July 1, 2024.”

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Annual Teacher Partnership and Recognition Event: Partnership

Teacher Partnership and Recognition Event (Spring 2024 and Spring 2025):

This event is connected to the institutes and is one of a few rare opportunities that we can gather and acknowledge the central educational role of our cooperating professionals in our partner districts. We rely on these educators opening their doors for practical experiences in the classroom.

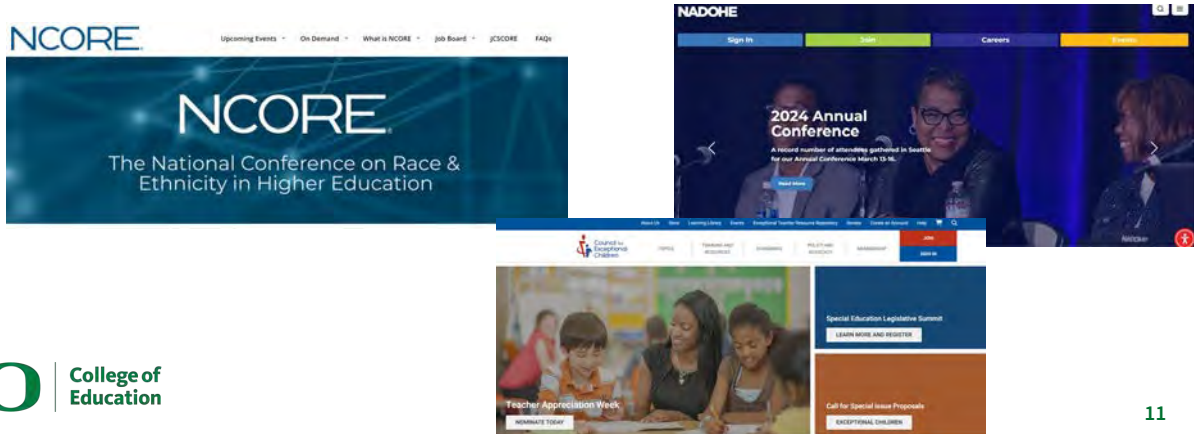


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Professional Development for Program Faculty: Sustainability

Conference attendance for faculty sustainability: Certain of the funding is earmarked for program faculty to attend to their own ongoing cultural and content growth and so faculty are supported in participating in personal learning experiences to expand and enhance their own current cultural knowledge bases. Guidelines are provided to ensure that the funds are dedicated to expansion in the areas of DEI.



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Program Focus: Timeliness and Relevance (acknowledgement of unique factors)

Program Focus: A small portion of the funding was allocated to individual programs to determine their own specific and time-bounded needs. Rather than large, global, or national topics, this funding option allows programs to work with their students in focus groups to identify what specific support would assist their group / cohort as they make their professional transition. This is expected to vary from program to program.



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Where does this work fit?

The activities associated with this funding are all conducted in addition to the rigorous content and equity centered programming, support, and state consultation that is already in place and ongoing for these programs.

- Affinity groups
- Social Justice
- Oregon tribal and indigenous knowledge preparation
- Consortium activities
- Licensure assessment barriers
- ESOL teacher preparation
- Cultural competency teacher preparation
- First year mentoring



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Agenda Item #4

Update on the Free Application for Federal Student Aid

Financial Aid Update

Student Services and Enrollment Management

Roger J. Thompson
SSEM Vice President

Jim Brooks

SSEM Senior Associate Vice President, Director of Financial Aid and Scholarships



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The Issue

First major student aid overhaul in over 40 years

Changes to the FAFSA

Changes to the Federal Methodology

Changes to Federal Pell Grant eligibility

Implementation delay to fall 2024



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The problems

Timing of the FAFSA

Initial availability – “soft launch”

Filing issues:

- SSN issue
- Unclear wording on questions
- Corrections

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The problems

FAFSA Processing:

- No processing until early March
- Small initial batches
- “Clean” FAFSA data
- FPS processing issues -reprocessing
 - Table updates for inflation
 - Errors in processing
 - IRS FA-DDX data issues

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The Impact

FAFSA filing numbers decreased:

Nationally by March 29: 39.6% decrease
Nationally by April 26: 24.3% decrease
Nationally by May 3: 20.5% decrease

Oregon by March 29: 34.6% decrease
Oregon by April 26: 19.8 decrease
Oregon by May 3: 17.3% decrease

California: 18.5% (55,761) decrease

Washington: 21.1% (7,709) decrease



National College Attainment Network FAFSA Tracker

5

The Impact

University of Oregon impacts:

-First ISIR records received: March 11, 2024
-First Banner load: April 14, 2024
-19.5% decrease in ISIRs received from 2023

Application and commitment dates extended



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The Impact

Software partners

Financial aid offer delays

- By mid-April 2023 offers out (~22,000)

- No offers out by mid-April 2024

Financial aid offers began last week of April

- Law, Graduate

- Then higher SAI non-resident

- Then higher SAI resident

- Other non-residents and residents

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The Numbers

Fall 2023 Offers:

- 23,879 incoming undergraduates

- 25,170 total offers

Fall 2024 Offers:

- 18,830 undergraduates

- 19,440 total offers

Offer notifications out to all packaged students

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The positives

When it worked, the FAFSA was easier to complete

The data is more accurate with FA-DDX

The team completed 5 months work of work in around 3 weeks

Most issues should be resolved for next FAFSA cycle

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Ongoing Concerns

Paper FAFSA filers

“Pell-ionaires”

FTI and manual income entry

Parent / Student reported large scholarships

Multi-student families

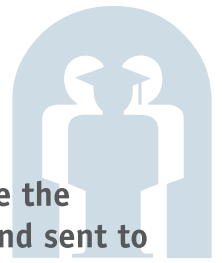
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Questions and Discussion



FAFSA Key Dates



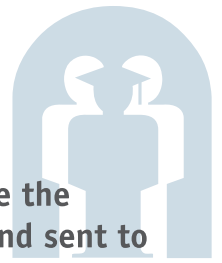
In a normal processing year, the FAFSA is released on October 1. Students complete the FAFSA, the FAFSA is processed, and ISIRs are generated within 3-5 business days and sent to institutions. Applicants and institutions are typically able to make corrections to the FAFSA immediately after it is processed. Below is a timeline of the 2024-25 cycle.

- December 27, 2020:** Consolidated Appropriations Act, 2021 signed into law; includes FAFSA Simplification Act
- January 19, 2021:** NASFAA includes FAFSA simplification as a top priority in a brief prepared for incoming Biden administration
- March 15, 2021:** Consolidated Appropriations Act, 2022 includes technical revisions to the FAFSA Simplification Act including delaying implementation for FAFSA and SAI formula provisions to 2024-25
- November 28 - December 1, 2022:** ED does not commit to October 1 FAFSA release date at its annual FSA Training Conference; shares vague dates for release of FAFSA-related documentation that do not appear to allow for an October 1 launch
- December 14, 2022:** NASFAA and NCAN send joint letter to White House asking for confirmation of whether 2024-25 FAFSA launch will occur on October 1
- February 7, 2023:** ED officials refuse to commit to October 1 FAFSA release date for 2024-25 at NASFAA's Leadership & Legislative Conference & Expo
- March 15, 2023:** NASFAA & other higher education organizations send a joint letter to ED asking for commitment on FAFSA release date
- March 21, 2023:** ED releases Better FAFSA Better FUTURE Roadmap with announcement of December FAFSA launch
- March 27, 2023:** ED releases 2024-25 paper draft FAFSA for 60-day public comment period
- September 18, 2023:** ED releases second draft paper FAFSA for 30-day comment period
- October 13, 2023:** NASFAA & other higher education organizations urge ED to provide specific FAFSA release date
- November 15, 2023:** ED announces 2024-25 FAFSA will be available by December 31. Students will also be unable to make corrections to submitted FAFSAs until late January
- November 17, 2023:** NASFAA joins other higher organizations in joint letter requesting more detailed information about timelines
- December 15, 2023:** ED announces FAFSA release will be a "soft launch"
- December 30, 2023:** FAFSA opens with significant outage periods and early reports of students unable to complete the application for various reasons
- January 7, 2024:** FAFSA Issue Alerts page created documenting many issues impacting applicants' ability to complete the form, including students whose contributors (parents and students' spouses) lack a social security number (SSN)
- January 30, 2024:** ED announces students will not be able to make corrections to submitted FAFSAs until the first half of March
- February 20, 2024:** ED announces resolution for FAFSA contributors without an SSN coming in first half of March; releases 9-step temporary workaround
- March 12, 2024:** ED announces that most contributors without an SSN can now complete their FAFSA section
- March 12, 2024:** ED announces IRS FA-DDX not working for contributors without an SSN
- March 15, 2024:** As larger batches of ISIRs are received, schools report seeing higher than normal rates of students applying for unsubsidized loan only. ED later changed the wording of the FAFSA question to ensure students answer correctly
- March 25, 2024:** ED announces delay in applicants' ability to make FAFSA corrections to the first half of April
- March 29, 2024:** ED catches up on FAFSA backlog


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KEY Red = Late announcement or release | Blue = NASFAA action/communication
Orange = Department of Education error

FAFSA Key Dates



In a normal processing year, the FAFSA is released on October 1. Students complete the FAFSA, the FAFSA is processed, and ISIRs are generated within 3-5 business days and sent to institutions. Applicants and institutions are typically able to make corrections to the FAFSA immediately after it is processed. Below is a timeline of the 2024-25 cycle.

- 
- April 8:** Limited data use and data sharing guidance related only to sharing FAFSA completion status for FAFSA completion outreach released
 - April 9:** FSA letter to college presidents encouraging schools to begin packaging
 - April 11:** FSA indicates they are in the final testing phase for student corrections
 - April 15:** Student corrections process opens
 - April 30:** Changes made to online FAFSA to allow individuals without an SSN to complete and submit FAFSA before identity validation process is completed. FA-DDX still not functional for this population

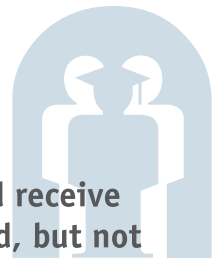
ISIR Key Dates




The ISIR is the output document of the FAFSA that communicates the Student Aid Index (SAI) and Pell Grant eligibility to financial aid offices, which they use to determine a student's eligibility for financial aid. In a normal processing year, ISIRs are generated within 3-5 days after students submit the FAFSA, and are sent to institutions at that point. Below is a timeline of the 2024-25 cycle.

- **March 21, 2023:** Better FAFSA Better FUTURE Roadmap indicates test ISIR files will be sent to schools and third-party vendors in July 2023
- **September 28, 2023:** ED releases 3 ISIR test data files
- **November 15, 2023:** ED announces delivery of ISIRs delayed to late January
- **January 30, 2024:** ED announces ISIR delivery to schools and states will be further delayed to first half of March and will be sent in batches as part of a ramp-up strategy
- **February 15, 2024:** ED releases 8 additional test ISIRs, not system-generated, not delivered via new FTI-SAIG mailbox
- **March 4, 2024:** ED releases ISIR transmission plan with small ISIR batches anticipated to be sent in first half of March, ramping up to larger batches over the following days or weeks, and entire ISIR backlog transmitted within 2 weeks following ramp up
- **March 11, 2024:** First small batch of ISIRs sent to limited number of schools
- **March 13, 2024:** ED begins transmitting larger ISIR batches; majority of schools should receive at least 1 ISIR and many will receive dozens
- **March 25, 2024:** ED announces reprocessing of ISIRs impacted by SAI formula issue that ignored dependent student assets will not take place until after corrections process opens
- **April 4, 2024:** ED announces it will reprocess all ISIRs impacted by inaccurate IRS data transfer, beginning in the first half of April
- **April 9:** Updates on timelines for reprocessing and corrections
- **April 10:** FSA provides details on the school- or state-specific data file to be delivered to Student Aid Internet Gateway (SAIG) mailboxes soon to assist schools and states to further identify additional FAFSA records for which they can package aid
- **April 11:** FSA guidance that schools and states may, based on data provided by the Department, use their judgment to rely on the original ISIR sent—not the reprocessed record—under certain conditions
- **April 11:** Comment Codes Volume of FAFSA Specifications Guide updated to fix errors
- **April 17:** FPS reprocessing begins for the 10% of ISIRs impacted by asset issues in SAI formula begins in small batches; FA-DDX reprocessing promised by May 1
- **April 29:** Reprocessing for FA-DDX data issues begins

EdConnect Key Dates



EdConnect is a Windows-based software nancial aid administrators use to send and receive federal student aid information, including ISIRs. EdConnect is occasionally updated, but not necessarily in conjunction with the start of an aid processing cycle. Due to the changes in the FAFSA Simplification Act, EdConnect required an upgrade. Below is a timeline of the 2024-25 cycle.

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- A vertical blue arrow pointing downwards, with a white circle at the top and a white circle at the bottom. The arrow is positioned to the left of the timeline items.
- November 8, 2023:** ED sends Electronic Announcement to schools instructing them to upgrade to EdConnect 8.6.0
 - December 4, 2023:** ED announces issue with EdConnect 8.6.0; offers temporary workaround and promises fix in future release
 - February 27, 2024:** ED announces release of EdConnect 8.6.1
 - February 29, 2024:** ED announces issue with EdConnect version 8.6.1; removes software file from website
 - March 1, 2024:** EdConnect version 8.6.1 is re-released with supposed fixes
 - March 11, 2024:** ED announces issue with headers and trailers identified in the supposedly fixed EdConnect version 8.6.1. Instructions provided to users who downloaded prior to March 11 indicate they must take one of two proposed actions to address issues



SAI Formula/Student Eligibility Determination Key Dates

Formerly known as the EFC, the formula that determines a student's aid eligibility is typically updated annually and finalized prior to the release of the FAFSA on October 1. In a normal processing year, ISIRs contain accurate SAIs upon which financial aid administrators can make financial aid offers to students. Below is a timeline of the 2024-25 cycle.

- December 27, 2020:** Consolidated Appropriations Act, 2021 signed into law; includes FAFSA Simplification Act
- March 15, 2021:** Consolidated Appropriations Act, 2022 includes technical revisions to FAFSA Simplification Act including delaying implementation for FAFSA and SAI formula provisions to 2024-25
- November 21, 2022:** ED publishes 2024-25 Draft Student Aid Index (SAI) and Pell Grant Eligibility Guide; tables reflect original figures from FAFSA Simplification Act
- March 19, 2023:** ED releases first update of Draft Student Aid Index (SAI) and Pell Grant Eligibility Guide; tables still reflect original figures from FAFSA Simplification Act
- August 25, 2023:** ED issues second update to Draft Student Aid Index (SAI) and Pell Grant Eligibility Guide; tables still reflect original figures from FAFSA Simplification Act
- September 13, 2023:** A participant asks ED in a FAFSA webinar whether tables in the SAI formula will be updated for inflation; ED indicates no plans to do so for 2024-25 but will update in 2025-26
- September 21, 2023:** ED releases FSA Estimator
- September 25, 2023:** FSA Estimator taken down due to inaccurate SAI/Pell information being generated
- October 16, 2023:** NASFAA requests that ED update SAI formula tables for inflation
- January 23, 2024:** White House announces SAI formula tables will be updated; no details on when tables will be updated or whether it will impact ISIR delivery promised for late January
- January 30, 2024:** Final SAI Guide with formula tables updated for inflation published
- February 27, 2024:** ED announces it is making a significant change to the SAI formula to permit the Student Contribution from Income (SCI) to be as low as -\$11,130 vs. -\$1,500 from earlier versions of the SAI formula
- February 28, 2024:** ED is alerted to an issue with SAIs being incorrectly calculated due to dependent student assets being ignored
- March 1, 2024:** President Biden signs continuing resolution legislation, amending the FAFSA Simplification Act to place a -\$1500 floor on the SCI for 2024-25 and \$0 floor for 2025-26 and beyond to address earlier ED error
- March 12, 2024:** ED announces error in estimated SAIs provided to students from households with 2 income earners where one income is < \$60K causing assets not to be considered in the SAI
- March 21, 2024:** ED notified by a financial aid administrator that the IRS FA-DDX appears to be transferring the wrong line item from the tax return for US taxes paid, using a higher figure that includes self-employment tax (meaning SAIs are appearing to be lower than they should be)
- March 22, 2024:** ED announces error in SAIs being delivered to schools on ISIRs where student assets were not being counted toward the student contribution in the SAI, requiring reprocessing
- March 22, 2024:** ED notified by an FAA that IRS FA-DDX appears to be transferring incorrect figures for education credits
- March 29, 2024:** ED announces it is aware of reports concerning tax data provided on the Institutional Student Information Records (ISIRs) for 2024-25 FAFSA applications
- March 30, 2024:** ED updates March 29 Electronic Announcement regarding potential incorrect FTI data transferred from ED. Confirms <20% of applications are impacted. Confirms issues of "some fields are a mix of updated and original returns", education credit data inaccurate, manual entry tax paid and education credits wrong due to discrepancies in the instructions
- April 1, 2024:** ED provides follow-up on three separate incorrect tax data issues. Shares that it will only reprocess records if reprocessing would result in a lower SAI but that institutions can use PJ to use existing (incorrect) data or request reprocessing but that ED will assume schools will use incorrect data to make financial aid decisions