



HEERF PANEL

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Emergency Relief Funds

- Coronavirus Aid, Relief and Economic Security (CARES) Act – May 2020
- The CARES Act set up the Higher Education Emergency Relief Fund (HEERF), which was used by two other pieces of legislation:
 - Coronavirus Response and Relief Supplemental Appropriations (CRRSSA) – January 2021
 - American Rescue Plan (ARP) – March 2021
- We call these HEERF I, II and III respectively

Summary of how we used HEERF I and II funds

- Online application.
- Students told us what their area of need was (transportation, food, housing, etc.) and we awarded them a grant based on those areas. We determined amounts for each area based on our cost of attendance and the period of time the funds were meant to cover.
- Maximum amount was \$2000.
- Eligibility shifted as requirements from Dept of Ed changed. Started with just FAFSA students, then expanded to non-FAFSA filers and Continuing Ed students.
- We used some HEERF III dollars for summer 2021 using this same method.

International/DACA Students

- In the beginning, International students and DACA students were not eligible
- Guidance changed later on and we stopped requiring citizenship or eligible non-citizenship as a requirement

How we distributed money

- Direct Deposit or paper check mailed, depending on student's preference
- All of this went through the Financial Aid Office
- Award was listed with other awards until guidance changed and we were no longer allowed to show these grants as part of the offer letter
- All students received an email explaining the funds and when they would receive them

Challenges

- Might be missing some students by using an online application
- Very manual process for awarding
- Didn't allow for us to respond to specific needs students have

HEERF III – current

- We did block grants for students based on EFC for fall 2021.
 - 0 EFC - \$1800
 - 1-4000 EFC - \$1500
 - 4001-8000 EFC - \$1000
 - 8001-12000 EFC - \$5000
- We also gave a group of 21 staff members who work with students a budget of \$10,000 each to award to students based on their conversations with them
 - Student Support Specialists (Financial Aid) and Academic Advisors
 - Maximum of \$1000 grant

HEERF III – current

- This two pronged approach was done for two reasons:
 - 1) We felt we might be missing some students by using an online application and doing the block grants based on EFC
 - 2) Training opportunity for our staff as we move toward a more holistic advising approach. Easier to ask about barriers if you can help them get over the barrier.
- So far through one on one awarding, we have awarded \$21,199 in two months
- Staff report feeling empowered by the opportunity to directly help students who need it

HEERF III – future

- Continuing education students will receive block grants in November 2021
- Plan to do block grants for new spring 2022 students
- Depending on funds, we likely will do the one on one awarding again for spring 2022
- Hopeful that this experiment will result in getting institutional funds for this sort of emergency grant program going forward

Summary of how we used CARES, CRSSA and ARP

Source	Total Amount	Spent	Number of Students
CARES Act	\$3,168,305.00	All	1576
CRSSA	\$3,168,305.00	All	1459
ARP	\$12,293,495	\$9,429,945	4883



How we distributed money

- HEERF I: awarded in response to student identified "emergency expenses" (survey response). Also small cash grant for all in late spring 2020/early summer 2020. Time intensive process.
- HEERF II: awarded to high need individuals in spring 2021 as block grants. We examined multiple symptoms of need: loan balances, unpaid balances to college, behind in payments, late fees, estimated family contribution. Awards provided in Spring 2021.
- HEERF III: awarded as block grants. We continued with a point system based approach looking at EFC, unmet need, missed payments, late payment fees, and loan usage. Distributions made summer 21 and fall 21.

Summary of how we used HEERF I, II & III

- For each grant, students were given options. They could
 - Opt to take an electronic deposit into their bank account.
 - Opt to take a check and pick it up in person from the Business Office (Bursars Office)
 - Opt to apply it to any outstanding balance owed to the college.

International/DACA Students

- We had already distributed the first two rounds of stimulus payments by the time the clarity was provided retroactively that allowed DACA/International students to receive the money. We had used institutional dollars to try and help as best we could up until that point.
- Once clarity was provided – using our third round of funding, we gave a large block grant to all international/DACA/Undocumented students.

Challenges we faced

- Do application based approaches like we used in awarding Cares \$ create more advantage for those with higher means? Is that right?
- We felt the challenges with our international and DACA students right away but could not award money to help until Spring 2021 when clarity was offered around eligibility.

Reporting/Requirements

- We began publishing quarterly reports earlier this year. Executive summary format used in quarterly reporting of student aid fund.
- Studying outcome of grants – what was effect on retention? Can we re-create an institutional fund that functions in this way?
- Professional Judgement Communication Efforts:
 - Push notification on students bill every time they sign in. (parents will see this if the student gave them access to their bill program).
 - Email and notifications on Sharepoint site for all students were also used.

HEERF I, HEERF II, HEERF III

Using data and tools to make informed decisions.



Program	Timeframe	Allocation	Application Process
CARES (HEERF I)	May 4 –July 10, 2020	\$8,085,677	<ul style="list-style-type: none"> Application
HEERF II	April 8, 2021	\$8,085,677	<ul style="list-style-type: none"> Block Grants to Pell eligible students Applications
HEERF III (American Rescue Plan Act, 2021)	September 27– December 17, 2021	\$22,421,229 <ul style="list-style-type: none"> on 9/28/21 awarded \$11,508,500 Awarding is ongoing 	<ul style="list-style-type: none"> Block Grants to US Citizens and Perm. Residents Application from all others (Inter/DACA etc.)
For our purposes, it will be HEERF IV	March 21-May 13, 2022	Award remaining funds from the \$22.4 allocation	<ul style="list-style-type: none"> Block Grants to US Citizens and Perm. Residents Application from all others (Inter/DACA etc.)



Program	Students Assisted	Application Process
CARES (HEERF I)	4,723	<ul style="list-style-type: none"> 4,723 = Applications - manual review and approval process
HEERF II	6,527	<ul style="list-style-type: none"> 1,812 = Block Grants to Pell eligible students 4,718 = Applications – (raised their hand to be considered) Had an application start and stop date. (2 weeks) Had a known pool of students so awarding was simplified. Uploaded spring only awards on April 8, 2021
HEERF III	9,277 +	<ul style="list-style-type: none"> 9,277 = Block grant awards completed September 28, 2021 Students could OPT-IN to apply funds to U-Bill International, DACA and others to complete application between Oct. 5 – Nov. 4. (awards completed by Nov. 19) PJ outreach EMAILS starting 10/14/21 2021-2022 Changes in Financial Circumstances or Expenses The Office of Student Financial Aid The University of Iowa (uiowa.edu) Complete this online form to tell us more about your circumstances and our office will follow up with more information.



HEERF II Allocation Tool

Tier 1 UG Has App Has Pell and Loans Released	2000	Tier 2 UG Has App Has Pell and NO Loans Released	1750
Tier 3 UG NO APP Has Pell and Loans Released	1500	Tier 4 UG NO APP Has Pell and NO Loans Released	1250
Tier 5 UG Has App NO Pell has Loans Released EFC Between 5,712 and 12,000	1000	Tier 6 UG Has App NO Pell has NO Loans Released EFC Between 5,712 and 12,000	750
Tier 7 UG Has App NO Pell has Loans Released EFC < 12,000	400	Tier 8 UG Has App NO Pell has NO Loans Released EFC > 12,000	300
Tier 9 UG Has App EFC <= \$711	300		
Tier 10 UG Has App Has Loans Released and NO FR or FT19	1200	Tier 11 UG Has App NO Loans Released and NO FR or FT19	1000
Tier 12 UG Has App Has Loans Released and has FR or FT19	700	Tier 13 UG Has App NO Loans Released and has FR or FT19	500

- Developed a tool to determine award amounts per tier.
- Tool to validate eligible applicants.
- Assisted with budget and award planning.
- Exported recipients from the tool and uploaded files.
- Funds disbursed directly to students.



Program	Lessons Learned
HEERF I (CARES)	Reviewing applications labor intensive. Some unknown about number of applicants and if most financially needy students would apply.
HEERF II	Use of Block Grants to ensure Pell Recipients received awards. Application allowed non-Pell recipients to apply. Criteria considered EFC, if student took out loans, had Pell etc.
HEERF III (American Rescue Plan Act, 2021)	Use of Block Grants to make sure Pell Recipients received awards. Due to timing, used criteria of EFC, level of study, if total COA was not already met with a combination of grants and scholarships, and if G/P did not have .25% or > assistantship. Keys to Success: PLANNING, TIMELINE, TOOLS, COMMUNICATION, FLEXIBILITY Website: https://financialaid.uiowa.edu/resources/caresactext Quarterly report posted: https://financialaid.uiowa.edu/sites/financialaid.uiowa.edu/files/HEERF%20III%20Report%202020.8.21.pdf


