



SC Higher Education Tuition Grants Commission

Providing Opportunity. Promoting Choice.

111 Executive Center Drive
Suite 242
Columbia, SC 29210
(803) 896-1120
info@sctuitiongrants.org

Katherine H. Stevens
Executive Director

AGENDA

Tuesday, March 10, 2026; 10:30 A.M.

Microsoft Teams Meeting: Meeting ID: 250 136 075 728 18; Passcode: AA9zv6fq

If needed, attendees may dial in using the number below:

(803) 454-9963

Phone Conference ID: 396 286 839#

1. Welcome and Commission Roll Call..... Katie Stevens
2. * Approval of Minutes of June 17, 2025 Commission Meeting..... Boone Hopkins, Chair
3. Final Report on 2024-2025 Program Reviews..... Katie Stevens
4. Review of House Legislative Oversight Process..... Katie Stevens
Commission Strategic Plan Update and Timeline
Update on H.4738 Amendment Related to Tuition Grant Funding
5. Update on the 2025-2026 Award Year..... Zach Christian
6. Agency Updates and Initiatives..... Katie Stevens
Staff Updates, FAFSA Completion Portal, Agency Outreach Initiatives)
7. SC Residency Updates – Guidance, Policies, and Forms..... Zach Christian
8. Review of 2026-2027 Budget Request..... Katie Stevens
9. SCICU Update and Legislative Outlook..... Robert Lloyd
10. * Staff Recommendation: Initial 2026-2027 Award Amounts..... Katie Stevens
11. Reminder: State Ethics Forms for SCTG Commission Members..... Boone Hopkins, Chair
Due March 30 – Detailed instructions and training videos
available at ethics.sc.gov
12. New Business..... Boone Hopkins, Chair
13. Adjournment..... Boone Hopkins, Chair

Next Scheduled Commission Meeting:
Tuesday; June 16, 2026; 10:30 AM

*** Commission Vote or Action Needed**

In compliance with the Freedom of Information Act, the Higher Education Tuition Grants Commission notified media outlets of the time and location of this meeting on March 2, 2026.



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MINUTES

South Carolina Higher Education Tuition Grants Commission Meeting
Tuesday, June 17, 2025
Virtual Meeting
Columbia, South Carolina

Commission Members Participating:

Dr. Boone Hopkins, Converse University, Chair
Dr. Gene Fant, North Greenville University, Vice Chair
Dr. Natalie Harder, Coker University, Secretary
Dr. Ernest McNealey, Allen University
Dr. Pamela Richardson Wilks, Clinton College
Ms. Elise Ahyi as Proxy for Dr. John Dozier, Columbia College
Dr. Anita Gustafson, Presbyterian College
Ms. Hannah Craig as Proxy for Dr. William Barker, Southern Wesleyan University

Commission Members Absent:

Dr. Jeff Perez, South Carolina Commission on Higher Education, Ex-officio

Non-Commission Member College Presidents Participating:

Mr. Daniel Muller as Proxy for Dr. Bruce McAllister, Bob Jones University
Mr. Keith Faulkner, Charleston Southern University
Dr. Steve Adamson, Erskine College
Dr. Ronnie Hopkins, Voorhees University

Dr. Boone Hopkins, Commission Chair, called the meeting to order at 10:31AM. Ms. Katie Stevens, Commission Executive Director, informed participants the meeting is being transcribed and is being held in compliance with the Freedom of Information Act. She welcomed all in attendance and conducted a roll call of the Commission Members. Ms. Stevens confirmed the participating Commission Members in attendance and noted that Ms. Elise Ahyi is attending as Proxy for Dr. John Dozier, Columbia College, and Ms. Hannah Craig is attending as Proxy for Dr. William Barker, Southern Wesleyan University. A quorum was established.

Dr. Hopkins called for a motion to approve the March 11, 2025, Commission Minutes. Dr. Ernest McNealey, Allen University, moved to approve the Minutes and Dr. Natalie Harder, Coker University, seconded the motion. There was no discussion, and the motion was approved unanimously.

Dr. Hopkins called upon Ms. Stevens to report on Agency Updates at the Commission. Ms. Stevens announced Mr. Ross Waddell as the new Program Operations Coordinator at the Commission as of May 2, 2025. Ms. Stevens noted that Ms. Kira Demery's title was recently updated from Fiscal Operations Coordinator to Fiscal Operations Manager to better reflect her role with the Commission. Ms. Demery recently completed the LeadSC Program, a training program offered by the South Carolina Department of Administration for emerging leaders in state government. Ms. Demery continues to earn NASFAA credentials, recently completing her fourteenth credential, and soon will begin a two-year Treasurer Elect term with the SC Association of Student Financial Aid Administrators. Ms. Stevens also shared that Mr. Zachary Christian, Commission Deputy Director, coordinated the Commission's participation at Higher Education Day at the State House, as well as College and

Career Decision Day. Mr. Christian will be attending the annual NASFAA conference later this month in Anaheim, CA where he will participate in a panel to discuss his work with the state advocacy network. Ms. Stevens shared that she got married and changed her last name in April. Ms. Stevens also recently completed the South Carolina Executive Institute program where she built relationships with other executive managers and agency heads throughout state government.

Ms. Stevens informed attendees that the Commission has wrapped up the hearings portion of the Legislative Oversight Review. A total of four hearings were held between February and May of this year. Ms. Stevens also shared that the Commission recently completed a Financial and Procurement Audit by the State with no findings, and it was determined that adequate corrective action was taken on the one minor finding in a prior year's audit.

Ms. Stevens provided an update on the FAFSA Completion Portal made available to South Carolina high school counselors that allows them to view FAFSA completion statistics. Ms. Stevens reported that 40 high schools took advantage of the use of the portal, and data shows that schools who took advantage of this resource are outperforming other schools in submitted and completed FAFSAs. Ms. Stevens announced a live webinar that will take place on September 10, hosted by the South Carolina Department of Education, that will explain how the FAFSA Completion Portal works to other schools in the state in an effort to increase the number of participating high schools for the upcoming FAFSA cycle.

Ms. Stevens informed the Commission and all attendees of the targeted outreach conducted by Commission Staff to assist former Limestone University students with transferring their Tuition Grants to other participating colleges and universities, as well as providing information regarding other options available to them throughout the State.

Dr. Hopkins called upon Mr. Christian to discuss the Adoption of Commission By-Laws, and to provide a brief overview. Mr. Christian reported that during the data gathering process for the House Government Efficiency and Legislative Oversight Committee's review, it was discovered that other Commissions throughout the State have published By-Laws, and while no statutory requirement outside of what is required for the Department of Motor Vehicles could be found, Commission Staff wanted to ensure By-Laws were reviewed and adopted by the Commission. The draft of the By-Laws was provided to all Commission Members and college presidents prior to the meeting for review. Dr. Hopkins asked if anyone had questions for Mr. Christian about the By-laws, and there were none. Dr. Hopkins called for a motion to adopt the by-laws as presented. Dr. Harder moved to approve the By-laws and Mr. Keith Faulkner, Charleston Southern University, seconded the motion. There was no discussion, and the motion was approved unanimously.

Dr. Hopkins invited Mr. Christian to provide a Review of the 2024-2025 and 2025-2026 Award Years. Mr. Christian informed attendees that the maximum Grant for the 2024-2025 award year was \$4,800, with an average grant of \$4,405. Mr. Christian also noted that 13,000 (+4.18% change) grants were realized out of the 24,590 (-6.14% change) commitments made, as of June 5, 2025. This demonstrates a show-up rate of 52.87% (increase of 5.24%). The total number of applications received in 2024-2025 was 29,288 (-8.42% change). Mr. Christian explained that while the overall number of applicants were down in the 2024-2025 award year as a result of the challenges with FAFSA Simplification, the efforts that the Commission has taken to expand Grant access to a wider range of students resulted in more Grants disbursing. Based on projections for 2025-2026, the Commission authorized an increase in the maximum Tuition Grant to \$5,000. So far in the 2025-2026 award year, Tuition Grant applications are up as the FAFSA process for the 2025-2026 is going much smoother than it did in the prior award year.

Dr. Hopkins asked Ms. Stevens to provide an Update on SC Tuition Grants Program Reviews. Ms. Stevens explained that Commission Staff have begun communicating with each college and university's third-party auditors about the required annual Program Reviews and reminded everyone that these are due back by December 31, 2025.

Dr. Hopkins called upon Mr. Christian to discuss the Requirement to Verify South Carolina Residency. Mr. Christian explained that the Commission requested the State residency verification policy from each institution for the South Carolina Tuition Grants Program and will be reviewing the policies to determine what, if any, adjustments may be needed for to ensure consistency across all institutions participating in the Program. This request came about after discovering that students received the Tuition Grant who were not eligible based on residency, and schools had to go back and refund the Commission for Grants that disbursed to students who were not eligible.

Dr. Hopkins invited Dr. Robert Lloyd, SCICU, to report on the 2025 Legislative Session. Dr. Lloyd reported that the South Carolina economy remains dynamic, and an increase in tax revenue resulted in a substantial budget surplus. Higher Education Excellence Enhancement Program (HEEEP), state funds designated for HBCU's and traditional women's colleges, was funded again for the upcoming year. The General Assembly agreed to maintain funding for the Tuition Grants program at the existing level and agreed to an increase in operating expenses for continued funding of their system, myTG. Dr. Lloyd also reported on the possibility of allowing lottery ticket purchases to be made with debit cards, which would increase the total amount of lottery spending in the State and if passed in legislation next year could potentially increase grant and scholarship funding in the State. Dr. Lloyd announced a legislative conference for Higher Education leadership taking place June 18, 2025 at the Convention Center. South Carolina Speaker of the House, Representative Murrell Smith, as well as someone from the National Association of Independent Colleges and Universities will be in attendance providing updates. Dr. Hopkins asked if anyone had questions for Dr. Lloyd, and there were none.

Dr. Hopkins called upon Ms. Stevens to discuss the State Budget Request for the South Carolina Tuition Grants program for FY27. Ms. Harrison stated the Tuition Grants Commission is required to submit its Budget Request to the Executive Budget Office each fall for funding in the next fiscal year. Ms. Harrison presented the projection that the Program can sustain the maximum grant of \$5,000 for the next three years with no additional funding needed, assuming all existing funding continues at the current amount. Based on this, Ms. Stevens recommended that we not ask for any new money, but we need to request level funding.

There are two different approaches the Commission can take when asking the General Assembly to maintain the increase in funding for the Program:

(1) Create a request for recurring general funds (State appropriations) in the requested amount. Using this approach, the Legislature will view the request as a monetary need to sustain the increased grant amount moving forward. If approved, this would create a more stable source of funding; however, if the amount is not available in recurring funds through general State appropriations, they could opt to provide the funding once again through Lottery allocations. This option has been utilized in the past; however, the request was not approved.

(2) Create an annual request for non-recurring funds at the current amount as Lottery allocations.

Ms. Stevens asked if anyone had questions about the information presented. Dr. Gustafson asked if not asking for additional funding was the right move given the possible increase in State lottery funding through the proposed use of debit cards for lottery purchases. Dr. Gustafson also noted the potential, on the federal level, of FSEOG going away and Pell being reduced. Based on this, Dr. Gustafson asked if not asking for additional State funding was the correct move. Ms. Stevens answered that she believed it was the right move at this time considering the amount of carry-forward dollars the Commission has. Dr. Gustafson asked why all students who were awarded did not receive the Grant if there is so much carry-forward, and Ms. Stevens clarified that the students who were awarded but did not receive the Grant were not actually eligible for the Grant. Ms. Stevens clarified that any eligible student in our system who files by the August 1 deadline is receiving a Tuition Grant. Dr. Hopkins called for a motion to approve the 2026-2027 Budget Request to the State Budget Division with a request for \$10 million in lottery funds to be converted to recurring general funds. Dr. McNealy moved to approve the Budget Request and Dr. Harder seconded the motion. There was no further discussion, and the motion was approved unanimously.

Dr. Hopkins announced the Rotation of the Tuition Grants Commission and Election of Officers. As scheduled, Dr. Gene Fant, North Greenville University, Dr. Anita Gustafson, Presbyterian College, and Dr. William Barker, Southern Wesleyan University, are rotating off the Commission. Presidents rotating on the Commission according to the Rotation Schedule are Dr. Bruce McAllister, Bob Jones University, Dr. Dwaun Warmack, Claflin University, and Dr. Elizabeth Davis, Furman University. Dr. Hopkins announced a new Vice Chair and Secretary for the Commission need to be elected due to elected officers rotating off the Commission. Dr. Hopkins called for a motion to approve Dr. Dwaun Warmack as the new Vice Chair and Dr. John Dozier as the new Secretary. Dr. McNealy moved to approve the appointment of officers and Dr. Harder seconded the motion. There was no further discussion, and the motion was approved unanimously.

Dr. Hopkins called upon Ms. Stevens to remind new Commission members to complete their Ethics filing by the July 1, 2025 deadline.

Dr. Hopkins asked if there was any new business. There was none.

Dr. Hopkins reminded all participants that the next meeting is scheduled for March 10, 2026.

Dr. Hopkins adjourned the meeting at 11:28 AM.

Respectfully submitted,

Mr. Ross Waddell, Program Operations Coordinator
Acting Secretary for
Dr. Natalie Harder, Secretary
South Carolina Higher Education Tuition Grants Commission



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2024-2025 College Program Reviews (Submission of Program Reviews is required by December 31, 2025)

<u>College</u>	<u>Received</u>	<u>Status</u>
Allen	12/30/2025	CLOSED
Anderson	10/17/2025	CLOSED
Benedict	10/31/2025	CLOSED
Bob Jones	10/30/2025	CLOSED
Charleston Southern	9/5/2025	CLOSED
Claflin	12/22/2025	CLOSED
Clinton	12/31/2025	CLOSED
Coker	12/15/2025	CLOSED
Columbia	12/30/2025	CLOSED
Columbia International	10/29/2025	CLOSED
Converse	12/10/2025	CLOSED
Erskine	1/28/2026*	CLOSED
Furman	12/31/2025	CLOSED
Morris	12/18/2025	CLOSED
Newberry	11/24/2025	CLOSED
North Greenville	10/15/2025	CLOSED
Presbyterian	11/7/2025	CLOSED
Southern Wesleyan	11/15/2025	CLOSED
Spartanburg Methodist	12/10/2025	CLOSED
Voorhees	12/9/2025	CLOSED
Wofford	12/22/2025	CLOSED

Data Classification: Public Use

Updated 1/29/2026

**Extension granted by agency*



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REVIEW OF LEGISLATIVE OVERSIGHT PROCESS AND REPORT

The Government Efficiency and Legislative Overview Committee of the South Carolina House of Representatives recently concluded its formal review of the South Carolina Higher Education Tuition Grants Commission as part of the state's recurring oversight cycle. On January 29, 2026, the full committee approved the subcommittee's final report of the agency. On January 30, Executive Director Stevens notified all college presidents of the review's conclusion and provided access to the full study report and the video presentation of the report presented by Subcommittee Chair, Representative Tim McGinnis.

The review was thorough and required substantial documentation, presentations, and follow-up responses from staff. While it was a significant lift for a small agency, our interactions with Committee members and staff were professional, respectful, and constructive.

Overall Outcome

- No findings of operational fault, mismanagement, or compliance deficiencies were noted.
- Findings and recommendations were policy-oriented and focused primarily on statutory structure, long-term funding trends, and broader higher education considerations.
- The report affirms the Commission's mission, statewide reach, and fiscal stewardship.

The Committee recognized the agency's ability to operate effectively with a lean staffing structure while maintaining program integrity and responsiveness.

Key Themes Identified

The report highlights several broader policy areas:

- The declining purchasing power of Tuition Grants relative to rising tuition costs.
- The structure and allocation of Children's Education Endowment funding under Section 59-143 of the SC Code of Laws.
- The relationship between need-based grants and merit-based scholarships.
- Outreach opportunities to expand awareness among adult and non-traditional students.
- The importance of periodic strategic plan updates.

Several recommendations are directed to the General Assembly and do not require agency action at this time.

Agency Action Items

Three recommendations require direct follow-through by the Commission:

1. Strategic Marketing Plan

Develop a formal marketing strategy to better inform adult learners, working professionals, and other non-traditional students of the Tuition Grant Program and its eligibility requirements.

Status: Planning efforts are scheduled to begin next week.

2. Strategic Plan Review Cycle

Formally review and update the agency's strategic plan on a 3–5 year cycle.

***Status:** Agency staff plans to present an updated strategic plan for review at the June 2026 Commission Meeting.

3. Clarification of Section 59-143 of the SC Code of Laws

Work with the General Assembly to clarify statutory language governing allocation of Higher Education Scholarship Grant funds.

****Status:** Agency leadership worked with Subcommittee Chair Tim McGinnis, legislative staff, and Dr. Jeff Perez at the Commission on Higher Education on a comprehensive review of the Statute, recommending amended language to clarify the intent of the Children's Education Endowment funding allocations. Amendment language has been presented and has passed the appropriate legislative committee.

Conclusion

The Legislative Oversight review affirms that the Commission is operating in accordance with statutory intent, demonstrates strong fiscal responsibility, and continues to effectively serve students.

While the process required significant staff engagement, the outcome confirms the agency's integrity, operational effectiveness, and alignment with legislative purpose.

***Strategic Plan Update and Timeline**

The agency's current Strategic Plan was adopted in 2020. The plan provides an overview of the agency's mission, vision, and agency operations, in addition to defining the agency's service constituency. The Plan goes on to outline eight goals for future program success. In short, these goals are:

1. Continue to focus on, and improve, effective and efficient processing of grant applications and awarding process.
2. Streamline and modernize student-related application processes
3. Build upon prior legislative advocacy efforts, building relationships with legislators and ensuring Program information is adequately communicated
4. Sustain the agency's reputation for fiscal efficiency in operations
5. Advocate for increases in funding for the Tuition Grant Program
6. Advocate for increases in funding for the State's other financial aid programs, particularly need-based grants
7. Continuing fiscal stewardship of taxpayer dollars
8. Strengthen the agency's Information Security posture, ensuring all sensitive and confidential PII is always protected to the best of the agency's ability

Over the past 5+ years, the Commission has continued to process and award grants efficiently and accurately, modernized key student-facing processes, strengthened legislative communication, maintained exceptional fiscal stewardship, advocated consistently for increased program funding, and reinforced the agency's security posture.

Importantly, this work was accomplished during a period that included the COVID-19 pandemic, unprecedented changes in financial aid systems, and the retirement of two long-standing agency

employees. Despite these transitions and challenges, staff ensured uninterrupted program administration and continued service to students statewide. Their professionalism, institutional knowledge, and steady commitment to the agency's mission should be applauded.

While the current Plan has been fully implemented, the next strategic cycle should place greater emphasis on forward-looking initiatives that foster program growth and enhanced access.

In the coming months, staff will begin developing an updated Strategic Plan that will:

1. Re-examine award methodology to ensure funds are reaching students with the greatest financial need;
2. Explore opportunities to responsibly grow the population of Tuition Grant recipients, particularly among adult learners and other "non-completers";
3. Continue strengthening operational excellence while identifying strategic opportunities for program expansion.

As part of this process, we intend to engage the financial aid community directly. At an upcoming training meeting, we will invite financial aid administrators to share their perspectives on emerging student needs and what they believe should be reflected in the Commission's next strategic framework. Their frontline experience will be vital as we shape a plan that is both practical and aspirational.

An updated Strategic Plan will be presented to the Commission for review and approval once this collaborative process is complete.

****Update on H.4738 Amendment Related to Tuition Grant Funding**

During the Legislative Oversight process, agency leadership identified ambiguity in Section 59-143 of the South Carolina Code governing the allocation of funds from the Children's Education Endowment Fund for Higher Education Scholarship Grants.

The statute's intent is clear that an enrollment-based percentage is to be applied to the amount made available under the Higher Education Scholarship Grants allocation of the Children's Education Endowment Fund, and that amount is to be transferred to the Tuition Grants Commission annually.

However, due to longstanding statutory ambiguity and structural complexity, that percentage has been applied to a much larger amount including Lottery allocations for the need-based grant program administered by the Commission on Higher Education, rather than the \$24 million specifically associated with the Endowment allocation.

After bringing the discrepancy to the attention of Oversight staff, the Tuition Grants Commission worked collaboratively with the Commission on Higher Education and members of the General Assembly to clarify the language and ensure the statute is implemented as originally intended.

The amendment clearly specifies the following:

1. The enrollment percentage is applied only to the Higher Education Scholarship Grants allocation under Section 59-143-10.
2. The calculated amount is then transferred from the need-based grant portion of the allocation to the South Carolina Tuition Grants Commission for Tuition Grants.
3. The remaining allocation supports Palmetto Fellows Scholarships and CHE's Need-Based Grant for public institutions.

This clarification ensures statutory compliance, strengthens fiscal transparency, and prevents future misinterpretation.

Fiscal Impact

As a result of correcting the calculation methodology, the Tuition Grants Commission will receive approximately \$9 million less annually beginning in FY27 from this funding source.

It is important to note that this correction aligns the allocation with statutory intent, the agency proactively identified the issue, and the General Assembly requested collaboration to clean up the language, and that work has been completed.

Long-Term Financial Planning

In anticipation of this adjustment, the agency conducted a comprehensive 10-year enrollment and budget projection.

Based on current enrollment trends and available carryforward funds, the Commission can maintain the current maximum award amount for the next several fiscal years.

Beginning in FY30, after nearly a decade of not having to request new funding for the Tuition Grants Program, the agency will need to request approximately \$12 million in additional General Fund and/or Lottery support to fully fund eligible students at current award levels.

If the General Assembly does not approve additional funding at that time, the Commission may face the difficult decision of reducing grant awards across all recipients in order to remain within available appropriations.

While the amended language results in a reduction in future funding, the Commission has:

1. Identified and resolved a statutory ambiguity,
2. Strengthened compliance with legislative intent,
3. Worked collaboratively with CHE and legislative partners,
4. Developed a responsible long-term financial plan, and
5. Preserved award stability for students in the near term.



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UPDATE ON 2024-25 AND 2025-26 AWARD YEARS **AS OF MARCH 4, 2026**

<u>MAXIMUM GRANT FUNDING SOURCES:</u>	<u>AVAILABLE FUNDS 2024-2025</u>	<u>AVAILABLE FUNDS 2025-2026</u>
State Recurring:	\$27,558,624	\$27,558,624
Children's Ed. Endowment*:	\$14,847,360	\$12,947,845
State Funds Interest**:	\$420,000	\$250,000
State Lottery Funds:	\$20,000,000	\$20,000,000
<u>Total Funding</u>	<u>\$62,825,984</u>	<u>\$60,756,469</u>
Approved Maximum Grant:	<u>\$4,800</u>	<u>\$5,000</u>
Funding Cutoff Date:	August 1, 2024	August 1, 2025
Applications Received:	29,288 (-8.42%)	36,453 (+9.10%)
Commitments Made:	24,590 (-6.14%)	25,805 (+7.18%)
Grants Realized:	12,975 (+4.02%)	13,075 (+0.77%)***
Show-up Rate:	52.77% (+5.16%)	50.67% (estimate)
Average Grant:	\$4,406	\$4,365 (estimate)

* Independent College Full-time Enrollment for South Carolina Residents calculated and determined by the SC Commission on Higher Education.

** Agency's Authority to spend Interest Earnings is set at \$250,000, regardless of the amount received. In 2024-25, agency received special authority to spend up to \$420,000. Current amount available in Interest Earnings is \$476,519. A special request to temporarily increase spending authority may be submitted to the Executive Budget Office, should it be needed.

*** With Certification for several Non-Traditional Programs still pending based on structure of Programs, this number will not be final until the end of the Award Year.



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AGENCY UPDATES AND INITIATIVES

Professional Association Involvement and Staff Updates:

Tuition Grants Commission staff continue to participate in state, regional, and national trainings, and professional development opportunities to ensure our agency has updated and relevant knowledge and skills required to successfully administer the Program:

In October 2025, Katie and Zachary attended the annual conference of the National Association of State Student Grant & Aid Programs (NASSGAP), held in Alexandria, VA.

In November 2025, Commission Staff attended the annual conference of the South Carolina Association of Student Financial Aid Administrators (SCASFAA), where a special concurrent session was held for the South Carolina Tuition Grants Program, enabling Commission Staff to provide timely and specific Program information to conference attendees from our participating colleges. All information and material shared during the session was sent out through our full distribution list for those unable to attend the Annual Conference.

In February, Katie Stevens attended the Management & Leadership pathway at the annual Leadership & Legislative Conference held by the National Association of Student Financial Aid Administrators (NASFAA), in Washington, D.C.

Also in February, Zachary, Kira, and Ross attended the annual conference of the Southern Association of Student Financial Aid Administrators (SASFAA), held in Charlotte, NC.

Kira Demery, Fiscal Operations Manager, has found ways to increase Agency efficiency regarding refund, disbursement, and internal reconciliation procedures. These updates have helped to better align the Agency's internal procedures with the South Carolina Enterprise Information System (SCEIS) best practices. Kira has identified and recommended procedural changes where necessary to mitigate risk and strengthen the Agency's fiscal integrity. Kira continues to attend Statewide meetings on Budget Procedures, Employee Benefits, and Information Technology, while also working to build rapport with Business Office personnel at our participating colleges. She has also worked with several more colleges, enabling them to return funds electronically, should they choose, ensuring a timelier refund process. As Treasurer-Elect of SCASFAA, Kira has used her knowledge and skills, while working closely alongside the current SCASFAA Treasurer to recommend policy changes to the SCASFAA Executive Board. Her continued involvement on the Board has been a tremendous benefit to the Agency.

Ross Waddell, Program Operations Coordinator, has nearly survived his first full year with the Commission. Despite only working with the Program since May 2025, Ross has quickly found his footing and has helped the Agency with critical outreach efforts, attending and presenting at nine "financial aid night" events, providing Program and other financial aid information to various audiences. He is currently serving on the planning committee for College and Career Decision Day, an annual event at the State House that is spearheaded by the Commission on

Higher Education and celebrates the accomplishments of each year's high school graduating class. His warm personality and quick attention to detail have enabled him to build a solid rapport with our financial aid partners, students, and families. Ross, alongside Kira who formerly served in his position, recommended significant process enhancements for student appeals, which have gone into effect with the 2026-27 award year appeal cycle. These changes should help streamline the internal appeal process and guide students through the initial submission of appeal documentation. Ross has also taken charge of the current digitization of Agency records project to prepare for transmittal to State Archives.

Zachary Christian, Deputy Director, presented a session titled "Advocacy by the Numbers: Turning Grant Data into Legislative Action" at both the annual NASSGAP and SASFAA conferences, sharing information on the agency's internal geocoding process used to support both SCICU's letter writing campaign efforts and the direct communication sent from the Agency to all members of the General Assembly. Additionally, at SASFAA, Zachary presented a session titled "Searching for Quality Live Data: SQL for All," where he provided information and resources to support financial aid administrators in understanding the basics of SQL and how to work with their Financial Aid Management Systems to retrieve necessary data and reports. In October, Zachary began the start of his two-year term as Co-Conference Chair on the Executive Committee of NASSGAP. He will support the Association in planning the next two annual conferences, set to be held in Stateline, NV (October 2026), and Nashville, TN (October 2027).

Katie Stevens, Executive Director, wrapped up a decade-long tenure on the Executive Committee for NASSGAP in October. During her time with the organization, she served as Membership Chair, Secretary, Conference Chair, and President. During the October conference, NASSGAP presented her with their Distinguished Service Award. During the recent NASFAA Leadership & Legislative Conference, she met with staff members from the offices of Senator Lindsey Graham, and Representatives Joe Wilson, James Clyburn, and Russell Fry, advocating for support of Pell Grant funding, elimination of student loan origination fees, and other areas of importance for South Carolina students. Ms. Stevens also participated as a resource expert on a recent College Affordability panel hosted by the Hunt Institute as part of their State Policy Fellows program.

FAFSA Completion Status Information Portal Updates:

For the Class of 2026, school counselors at a total of 63 high schools are actively using the Tuition Grants Commission's FAFSA Completion Status Information Portal available through myTG. As of March 3, 2026, these schools are seeing an average FAFSA Submission Rate of 37.22% and an average FAFSA Completion Rate of 36.73%, compared to the statewide Submission Rate of 33.79% and Completion Rate of 33.37%, representing an increase of 3.43% and 3.36%, respectively.

As the Tuition Grants Commission continues onboarding additional schools throughout the cycle, we will continue monitoring and highlighting the success of this portal, as school counselors work to encourage their seniors to complete and submit their FAFSA forms.

Agency Outreach Initiatives:

In December 2025, the Commission launched a new online Data Center, designed to make Tuition Grants Program information more accessible and easier to use. The Data Center brings together FAFSA completion dashboards, recent Annual and Accountability Reports, and

historical Program data in one place, with interactive tools that make trends easy to review. Special thanks to Zachary for his work in planning and developing this new resource, and to Ross for ensuring the FAFSA completion dashboard is updated weekly.

For the Spring 2026 Semester, the Commission is fortunate to have Lily Oyebade, a sophomore business administration major at Columbia International University, join the team as a Communications and Outreach Intern. Lily has quickly added value to agency operations by designing social media content, working on messaging campaigns related to the application deadline, and reviewing institutional websites to ensure all information related to the Program is accurate. She also had the opportunity to join agency staff at the State House for the budget hearing to the House Ways and Means Higher Education Subcommittee and assisted with the annual communication to all State legislators concerning the impact of Tuition Grants in their districts. During the last half of the semester, Lily will be working on a marketing and communications plan geared toward adult learners and non-completers, informing them of funding options and opportunities to reenroll to complete their degrees. This project is a direct recommendation from the House Oversight Committee's study of the agency and aligns with the statewide goal to have 60% of adults in South Carolina to hold a quality postsecondary credential by 2030.



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Katherine H. Stevens
Executive Director

UPDATE ON SC RESIDENCY DETERMINATION FOR TUITION GRANTS PURPOSES

As discussed during the June 17, 2025, Commission Meeting, Commission Staff requested the State Residency Determination policy used by each of the participating colleges and universities, to review and ensure consistency in determining residency for South Carolina Tuition Grants Recipients. This thorough review enabled Commission Staff to identify areas of needed improvement to align with State Statute, R.62-600 – R.62-612 of the South Carolina Code of Regulations ("Residency Regulations") promulgated by the SC Commission on Higher Education, and the Tuition Grants Program Policies and Procedures Manual.

During this review period, the Commission on Higher Education, separately, began developing proposed regulatory revisions with a final draft being circulated in fall 2025 with the anticipation of being adopted into the Code of Regulations during this legislative cycle. Tuition Grants Commission staff used the proposed changes, while ensuring compliance with the current regulations, to develop a model residency determination policy and form which each participating college and university could adopt as-is or incorporate the language within existing policies. These documents, along with the initial request with the stated deadline to submit an updated policy, were sent on November 10, 2025, with a due date of March 2, 2026.

All but one institution met the required deadline, with a notification of non-compliance having been sent to said college's President on March 3, notifying them of the missed deadline. This college successfully submitted the necessary documentation for review and approval shortly after intervention from their President. As of the close of business on March 3, 2026, all twenty-one participating colleges and universities have submitted and received approval of their residency determination policies for South Carolina Tuition Grants purposes, effective with the 2026-2027 award year.

Commission staff recognize the challenges of implementing new policies, which led to the development of a model policy and form, and we thank each financial aid office for their support and partnership. As a State Agency administering taxpayer funds, ensuring compliance with State Statute, applicable regulations, and Tuition Grants Program Policies and Procedures protects the integrity of the Tuition Grants Program and mitigates risk for both our partnering institutions and the Commission.



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REVIEW OF THE 2026-2027 STATE BUDGET REQUEST FOR FUNDING OF THE SOUTH CAROLINA TUITION GRANTS PROGRAM

At the June 2025 South Carolina Tuition Grants Commission Meeting, the Commission approved the budget request to be sent to the State Executive Budget Office for funding of the South Carolina Tuition Grants Program for the 2026-2027 fiscal year. The agency submitted documents in September asking for continued funding of the \$10 million increase for the Tuition Grants Program that began in FY22. The Commission's Budget Request asked for consideration of these funds being moved from Lottery (non-recurring) to General Fund (recurring). In addition, the Budget Request included a \$180,000 General Fund increase to support the agency's personnel needs and to cover a required increase in centralized state Information Technology fees.

Executive Director Katie Stevens met with representatives from the Governor's office and the Executive Budget Office on **October 8, 2025**, to review the request and to discuss the budget request, the impact of the program, and to answer questions.

Governor Henry McMaster released his 2026-2027 Executive Budget in January. The Executive Budget recommended continued funding of the recent increases for both the Tuition Grants Program and CHE's Need-Based Grant Program. The Governor's Executive Budget recommends the funding source for these funds continue to be allocations from the Lottery account. The Executive Budget did not include the recurring funds request for agency operations.

The General Assembly convened in January to begin the legislative year for the State of South Carolina. The South Carolina Tuition Grants Commission appeared before the Higher Education Subcommittee of the House Ways and Means Committee on **January 20, 2026**, in Columbia. The Higher Education Subcommittee is chaired by Representative Nathan Ballentine (Richland/Lexington). He is joined on the subcommittee by Representatives Gilda Cobb-Hunter (Orangeburg/Dorchester) and Bill Taylor (Aiken/Lexington).

The House Ways & Means Committee has approved the recommendations of the Governor and has submitted to the full House a budget which sustains all current Program funds through a combination of General Funds and Lottery appropriations. The full House is scheduled to debate the Budget during the week of **March 9**.

The Commission appeared before the Senate Finance Higher Education Subcommittee on **February 19, 2026**. The Senate Finance Higher Education Subcommittee is chaired by Senator Ronnie Cromer (Newberry/Lexington/Richland). He is joined on the subcommittee by Senators Darrell Jackson (Richland), Tom Young (Aiken), Ross Turner (Greenville), and Tom Corbin (Greenville/Spartanburg). The full Senate Finance Committee is scheduled to meet beginning **April 7, 2026**, while the full Senate is tentatively scheduled to make its recommendations during the week of **April 20, 2026**.



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STAFF RECOMMENDATION REGARDING INITIAL 2026-2027 SOUTH CAROLINA TUITION GRANTS

Based on the House Ways & Means Committee's recommendation to continue level funding through General Fund and Lottery allocations, and with the expectation that the Senate will concur, Commission staff have evaluated all available funds and projected recipient numbers. Following the Commission's established philosophy of equalized grant values, staff recommend approval of the following initial grants for 2026–2027:

The Maximum Grant should remain at \$5,000 for the 2026-2027 Award Year.

A vote by the South Carolina Tuition Grants Commission is required to approve the initial Maximum Tuition Grant for the 2026-2027 academic year.



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Katherine H. Stevens
Executive Director

MEMORANDUM

TO: South Carolina Tuition Grants Commission Members
FROM: Katie Stevens, Executive Director
DATE: February 3, 2026
SUBJECT: Required Completion of State Ethics Commission's
Statement of Economic Interests Form

As a current member of the South Carolina Tuition Grants Commission, you are required by South Carolina State Law and by the State Ethics Commission to complete the Statement of Economic Interests (SEI) report for the 2026 calendar year. The filing requirement for the Statement of Economic Interests report includes, regardless of compensation, the members of all state boards, commissions or agencies.

A completed report **must be filed** with the State Ethics Commission by each individual Commission member no later than **March 30, 2026**, so that you are not penalized \$100 or more per day for failure to do so.

Each filer is required to complete their report electronically. After going to the State Ethics Commission's web site, you may review the User Guides section or go directly to the Electronic Filing link to proceed. If you do not already have an online account with the State Ethics Commission, you must create a user account after clicking the Electronic Filing link. The main web site is:

<https://ethics.sc.gov>

For detailed instructions, including how to migrate an existing account, please visit
<https://ethicsfiling.sc.gov/filing/help>.

REMINDER: Per State Ethics Commission requirements, all filers must disclose (1) the source and (2) the type (i.e., salary) of any private income received in the previous year by the filer or a member of the filer's immediate family under the Income & Benefits section of the SEI. The dollar amount is required ONLY for government income. The dollar amount box will close when you click on "private" if the source of the income is a non-governmental employer.

If you have any questions about the required completion of the SEI form, please contact the State Ethics Commission directly at (803) 253-4192.

Please be sure that your completed report is completed online with the State Ethics Commission by the **March 30 deadline**.

Thank you for your prompt attention to this matter.