

# nasfaanow

your association growing, changing, evolving

- ▶ ppy one year on
- ▶ visit nasfaa's new home
- ▶ nasfaa's podcast takes off
- ▶ return of year-round pell

## defending college access

### nasfaa fights for financial aid funding and daca dreamers

- ▶ drt outage causes chaos
- ▶ build your best policies and procedures manual
- ▶ nasfaa helps students suffering from school closures
- ▶ plus: 2017 conference photos and movers & shakers!





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# yesterday's challenges, tomorrow's opportunities

a message from the president

I think it's fair to say that, as a profession, we've had some unique and tough challenges over the last few years. In 2015, aid administrators struggled with heavy-handed rollouts of large regulatory packages like gainful employment, which escalated into uncomfortable congressional hearings where lawmakers from both sides of the aisle vented their frustration with our federal colleagues. After years of increases in the Federal Pell Grant program, we're facing stagnation at best, if not outright cuts, in Pell funding. And this past year we saw the continued loss of veteran colleagues, at schools and at ED, punctuated by the retirement of long-trusted partners like Federal Student Aid Policy Liaison and Implementation Director Jeff Baker.

Yet despite these challenges, I remain optimistic!

Our relationship with lawmakers has never been stronger. Helped by scores of on-the-ground financial aid administrators, NASFAA has partnered with representatives from both sides of the aisle on legislation ranging from the reintroduction of year-round Pell (which has since been signed into law) to Pell Promise programs to proposals that would give schools more discretion on loan limits, just to name a few.

We'll need those relationships on Capitol Hill going forward, especially as we fend off proposed raids on the student aid programs that could truly reach epic proportions. So far, Congress has rejected most of the \$150 billion in cuts proposed by the Trump Administration, but with many budget battles yet to be fought, our advocacy work must continue to operate at full capacity.

Our relationship with ED has begun to strengthen with the successful rollout of using prior-prior year income on the FAFSA, which so far seems to be having the exact effect we wanted. Many financial aid applicants received their need-based aid offers one to six months earlier this year, while the overwhelming majority of institutions did not change their admissions priority deadlines.

And, although retirements and organizational shifts within ED have meant losing some key Federal Student Aid partners, we welcome their new leadership. Less than a week after taking office, newly appointed Chief Operating Officer A. Wayne Johnson met with me to express his interest in partnering with NASFAA and our members, and to discuss issues like streamlining the FAFSA application process, effective communication to students, and even the implications of excessive financial aid administrator workloads. Already we have begun partnering with our federal colleagues to identify burdensome and duplicative regulations and to establish standardized time frames for program participation approvals and closeout of program reviews.

With every new challenge comes a new opportunity. If there's one thing I'm sure of, it's that our profession is up for the task. Onward and upward!

# a year of pride, honor, and gratitude

a message from the 2016-17 national chair



It has been my honor to serve as the 2016-17 NASFAA National Chair. What a great opportunity to be part of such an incredible group of friends and colleagues across the country. This has been the most rewarding experience in my career as a financial aid administrator, and I am so grateful to each one of you for making this journey so amazing.

Throughout the year, I have had the opportunity to travel to conferences nationwide and attend several meetings. What I see happening across all of our institutions is a continued commitment to ensuring students are at the forefront of the conversation when it comes to providing access and opportunity to attend college. This year we kicked off prior-prior year (PPY), and I have to say that YOU made that happen for students and their families. We spent a lot of time building up to PPY, and after many conference sessions, benchmarking, and learning from each other, we managed to be ahead of the curve. That was demonstrated throughout the 2016-17 school year, even when we faced unexpected challenges with the IRS Data Retrieval Tool outage. How cool is that! We were ready, and we faced it head on, because that's what we do: We face challenges to help our students succeed.

NASFAA continues to build relationships with legislators, and that has helped us gain a solid and positive reputation in Washington, D.C. I want to offer a special thank you to NASFAA President and CEO Justin Draeger. Without a doubt, Justin is the face of NASFAA, and he has served us so well this past year. He checks in with the Board of Directors and NASFAA members to find out what's happening on campus and then continues to provide that information to Congress so that we can be heard. He and the NASFAA staff have

been right there with the membership through many of the challenges we faced this year, and I am personally honored to work with such a stellar group of individuals.

I also want to thank our hard-working Board of Directors for their continued commitment to NASFAA and our profession. We had some challenging discussions this past year, and I am so grateful for your willingness to contribute to these important dialogues. Without a doubt, our NASFAA Board is dedicated to serving the association and its members, and making an impact.

Our association would be less strong if not for the members and volunteers who help move us forward. I know how hectic our world is on campus, and I want to recognize the NASFAA members who volunteered their time and talent this year, despite the demands of their jobs. Thank you for your commitment to NASFAA and your students. We would not be able to make such an impact without each and every one of the more than 500 individuals who volunteered this year—you can read about them starting on page 56 of this report. So many opportunities and so many volunteers! I am extremely proud to be a part of NASFAA and the financial aid profession.

As we bring this year to a close, remember to continue your commitment to students and to opening up so many opportunities for them on a daily basis. Stay connected and involved in NASFAA, and thank you for the honor of serving alongside you this past year!

*Liza Blazer*

# welcome to nasfaa's new home!

NASFAA moves to a more collaborative, high-tech work environment



*Bright, welcoming entry to NASFAA's new workspace.*

In May 2017, following a year-long design and buildout process, NASFAA moved its headquarters from 1101 Connecticut Avenue NW to 1801 Pennsylvania Avenue NW, Suite 850, in Washington, D.C. We designed our new office to comfortably encourage collaboration, openness, and teamwork—and to help us better serve our members. The new high-tech video- and audio-enabled conference rooms will allow NASFAA to accommodate the entire Board of Directors, hold two task force or committee meetings at one time, and host policy events. We can also use our state-of-the-art audio/visual capacities to better host webinars and even join state and regional meetings by video, as needed.

The move gave us the opportunity to create a space that meets the needs of our changing work environment—one with a larger-than-ever number of telecommuters, traveling staff, networking events, and IT infrastructure requirements. We completed the buildout and move-in process on schedule and on budget, with frequent updates to, and oversight from, NASFAA's Financial Affairs Committee and Board of Directors.

We are pleased to have a functional, attractive, and conveniently located space to represent NASFAA, and encourage all members to stop by when they find themselves in Washington, D.C. to use our space to work, relax, or collaborate.



*The Re-examining Paradigms of Campus-Based Aid Task Force takes advantage of the modern meeting space.*



*Contemporary work areas.*



*Sleek, modern reception area.*



*Staff enjoying the new environs.*



*Panoramic rooftop views of Washington, D.C., just two blocks from the White House.*



*Comfortable discussion areas, with custom murals painted by NASFAA's own Laura Aberant.*

# governance

Charting NASFAA's course as we train members, advocate for student access and success, and serve as a forum on student financial aid issues

This year, NASFAA embarked on its new, three-year strategic long-range plan (SLRP). The 2017-20 SLRP sets the course for the coming years and serves as a guide for staff and the Board to continue our commitment to measurable goals that best serve the mission and vision of NASFAA. This helps us to approve priorities for implementation over the next three years, and is also the basis for the Board-reviewed annual Targets and Thresholds document, which operationalizes the objectives laid out in the SLRP, available at [https://www.nasfaa.org/uploads/documents/Strategic\\_Long\\_Range\\_Plan\\_2017-20.pdf](https://www.nasfaa.org/uploads/documents/Strategic_Long_Range_Plan_2017-20.pdf).

In 2016-17, the Association Governance Committee (AGC) thoroughly reviewed the current 2014-17 strategic plan, collected data, and evaluated overall performance of the past three years. Based on those discussions, the mission statement now includes NASFAA's desire to provide services, along with professional development, to our constituents. The new plan also incorporates NASFAA's Diversity and Inclusion Statement, which the Board approved in 2015, and outlines the association's commitment to pursuing and promoting diversity and inclusion in all endeavors.



NASFAA's 2016-17 Board of Directors



# the 2016-17 nasfaa board of directors

2016-17 AGC Chair Dan Mann oversaw this important work. He noted: "AGC and the Board agreed that the goals and objectives of the past three years had been largely met, and in the very few instances where they were not, the lack of success most often reflected shifting priorities that had been thoroughly vetted with the Board. NASFAA is on a healthy, productive path. This new SLRP therefore is not a course-correction, but rather builds upon the work of the past three years."

Based on the data collected, the AGC adjusted the goals and objectives of the 2017-20 plan to ensure NASFAA continues on the right path to promoting student access and success. The Board of Directors approved this plan in June 2017.

## mission, vision, and ethics

Learn more about NASFAA's values under the "About NASFAA" tab on [NASFAA.org](http://NASFAA.org), where you'll find the following information and more:

- NASFAA's Mission, Vision, and Commitment to Diversity and Inclusion
- Core Advocacy Principles and Mission
- Core Operating Values
- Statement of Ethical Principles
- Code of Conduct
- Code of Conduct Enforcement Procedures
- Code of Conduct Q&A
- Ethics Complaint Submission Form
- The Exploring Ethics Series

### officers

National Chair: Lisa Blazer, University of Texas at San Antonio

National Chair-Elect: Billie Jo Hamilton, University of South Florida

Past National Chair: Dan Mann, University of Illinois at Urbana-Champaign

Treasurer: Brad Barnett, James Madison University

### regional representatives

EASFAA: Kelly Morrissey, Mount Wachusett Community College

MASFAA: Thomas Ratliff, Indiana Wesleyan University

RMASFAA: Joe Donlay, Colorado State University

SASFAA: Amy Berrier, University of North Carolina at Greensboro

SWASFAA: Janell Valdez, The University of New Mexico Health Sciences Center

WASFAA: Barbara Bickett, DeVry University

### representatives at large

Jackie Kennedy Fletcher, Indiana University

Kim Jenerette, Cedarville University

Lisa Hopper, National Park College

Angela K. Johnson, Cuyahoga Community College

Ellen R. Neel, Glendale Community College

Nick Prewett, University of Missouri

### commission directors

Heather Boutell, Bellarmine University

Larry Chambers, Rochester Institute of Technology

Raul Lerma, El Paso Community College

### ex-officio

President: Justin Draeger, NASFAA

Board Executive Secretary: Beth Maglione, NASFAA

Chief Financial Officer: Mitchell Weintraub, NASFAA/Cordia Partners

### special advisor to the board

Diversity Officer: James Brooks, University of Oregon

# advocacy

Presenting a unified voice in support of students and the higher education institutions they attend

NASFAA's advocacy initiatives center on the need for policymaking that takes into account the complex needs of students, institutions, and the financial aid community. Our advocacy efforts emphasize increasing access to and completion of higher education; simplifying the student aid process; minimizing student indebtedness; and promoting need-based aid. NASFAA's advocacy work focuses primarily on advancing the association's reauthorization priorities and fighting to maintain funding for the Title IV programs through the federal budget process.



Justin Draeger testifies before two subcommittees of the House Committee on Oversight and Government Reform.

## Proactive Advocacy on Legislation and Policy

### Capitol Hill Testimony

**Hearing: Improper Payments in the Federal Government: Student Aid.** NASFAA President Justin Draeger testified before two subcommittees of the House Committee on Oversight and Government Reform on May 25, 2017. **Draeger's testimony** focused on the careful balance between ensuring program integrity and limiting obstacles to verifying eligibility for federal student aid, which overburden students and schools. In particular, Draeger emphasized the importance of the IRS Data Retrieval Tool (DRT) and the detrimental effects of its outage on students and families.

**Hearing: Improving Federal Student Aid to Better Meet the Needs of Students.** NASFAA members JoEllen Soucier of the Houston Community College System and Youlonda Copeland-Morgan of the University of California-Los Angeles **testified** at a hearing of the House Committee on Education and the Workforce Subcommittee on Higher Education and Workforce Development on March 21, 2017. Soucier and Copeland-Morgan presented their perspectives on opportunities to strengthen the federal student aid programs as Congress continues to prepare for the pending reauthorization of the Higher Education Act.

### NASFAA Advocacy Pipeline

In its fifth year, NASFAA's [Advocacy Pipeline](#) initiative continues to bring financial aid administrators from across the country to Capitol Hill to advocate on behalf of their students and schools. In 2016-17, 26 NASFAA members, chosen from more than 100 volunteers, participated in the Advocacy Pipeline for a total of 50 meetings with congressional members and staff. In October, NASFAA hosted a special graduate and professional (G/P) aid administrator day with nine members from G/P institutions participating in 20 meetings with key congressional members and staff.

### Task Forces and Working Groups

**Task Force: Assessing Tuition- and Debt-Free Higher Education (July 2016 - January 2017).** This task force evaluated the implications and tradeoffs of tuition-free and debt-free college for institutions of higher education and the broader higher education landscape. While the political landscape has shifted in the time between its deliberations and the final report, and a national program like President Obama's America's College Promise is highly unlikely under the new administration, the findings in the [task force report](#) can help inform state and local program development for the short term and may well form a framework for a national program at some point in the more distant future.

**Working Group: Cost of Attendance Construction (October 2016 - May 2017).** This group addressed the variation in amounts of cost of attendance components set by schools and the reasons why they vary, standardization of costs in certain categories, good practices in cost of attendance construction, and recommendations for the Board of Directors to adopt as NASFAA policy positions.



*Youlonda Copeland-Morgan testifies at the March 21 hearing on improving federal student aid.*

### Task Force: Prior-Prior Year (PPY) Implementation (October 2015 - June 2017).

In response to President Obama's September 13, 2015, announcement of the implementation of the use of prior-prior year (PPY) income on the FAFSA and the move to make the FAFSA available on October 1 ("Early FAFSA"), NASFAA formed a task force to identify and address implementation challenges and to monitor the first year of the new policy. Over a two-year period, the PPY Task Force provided a multitude of tools and resources to help NASFAA members with the implementation of PPY:

- [Financial Aid Timeline Tool](#)
- [PPY Implementation Timeline](#)
- [PPY Implementation Blog](#)
- [Open Letter to Administrators](#)
- [Recommended Best Practices](#)
- [Database of State Deadlines](#)
- [Case Studies of Four Institutions](#)

In addition, the task force surveyed members to learn more about the first year of implementation. The [findings](#) show that, overall, most survey respondents were pleased with the first year of PPY/Early FAFSA.

**Task Force: Graduate and Professional Loan Limits (November 2016 - June 2017).** This task force examined Graduate and Professional loans in the contexts of reauthorization of the Higher Education Act, the FAST Act, and a One Grant/One Loan scenario; in addition, the task force considered Grad Plus loan limits. In its August 2017 [white paper](#), the task force stressed the need for federal student loans for graduate/professional (G/P) students in favor of private market solutions, with access, equity, and workforce and societal needs for G/P graduates cited in their rationale. The task force recommended moving to a single G/P loan that would include a base annual entitlement amount, subject to mandatory increases for inflation. The loan would allow for additional eligibility up to cost of attendance based on underwriting standards similar to those used for Federal Housing Authority (FHA) mortgages. Aggregate limits would also be tied to FHA standards and would continue to be higher for existing eligible health professions programs.

### Reports and Meetings

**Improving Oversight & Transparency at the U.S. Department of Education's Office of Federal Student Aid.** As a performance-based organization (PBO), the U.S. Department of Education's Office of Federal Student Aid (FSA) is required by law to seek to improve customer satisfaction and provide high quality, cost-effective services. In this [white paper](#), NASFAA takes a critical eye to FSA's operations and—after benchmarking it against other federal PBOs, interviewing former federal officials and employees, and examining complaints from federal partners, Congress, the Government Accountability Office, and other federal watchdog groups—concludes organizational and structural changes are needed to help FSA meet its congressionally mandated objectives as a PBO. In the spirit of improvement and partnership, the report outlines several recommendations to strengthen accountability and transparency at FSA. NASFAA has a vested interest in the success of FSA and these recommendations, while put forth by the financial aid community, are designed to improve a results-oriented organization that serves students, stakeholders, and taxpayers.

**Key Meetings on Student Aid Policy Issues.** NASFAA staff met with leaders and staff from the following government organizations and committees in 2016-17:

- U.S. Department of Education
- U.S. Internal Revenue Service
- U.S. Office of Management and Budget
- U.S. Government Accountability Office
- U.S. Commission on Civil Rights
- White House Domestic Policy Council
- Congressional Budget Office
- House Committee on Education and the Workforce
- Senate Committee on Health, Education, Labor, and Pensions
- Senate and House Labor, Health and Human Services, Education, and Related Agencies Appropriations Subcommittees
- House Committee on Oversight and Government Reform
- Senate Committee on Homeland Security and Governmental Affairs

*JoEllen Soucier prior to the hearing on improving federal student aid.*

## Advocacy Resources and Tools for Members

### Advocacy Resources Online

Throughout 2016-17, NASFAA unveiled a variety of one-pagers, issue briefs, and fact sheets to aid NASFAA members in their own advocacy and understanding of key federal student aid issues. In February, NASFAA released [Making Financial Aid Work for All: NASFAA Priorities for 2017 and Beyond](#), which had also been shared with the transition team for President-Elect Trump. These new documents, on topics ranging from [FAFSA simplification](#) to [institutional risk-sharing](#), join other existing resources on the NASFAA website [Advocacy Resources page](#) to support member advocacy.

### Fight for Financial Aid

At NASFAA's 2017 National Conference in San Diego, CA, NASFAA launched a [Fight for Financial Aid](#) campaign aimed at elevating the voice of financial aid advocates in the face of deep proposed cuts to the federal student aid programs in President Trump's fiscal year 2018 budget proposal and continued threats of troubling cuts to student aid in Congress. NASFAA will continue developing tools and resources for its members to make their voices heard. Members can use [#Fight4FinAid](#) on social media and contact their members of the House of Representatives and the Senate in support of student aid.

### Budget Effect Estimator

As part of NASFAA's commitment to providing advocacy tools and resources for members, and to elevate the conversation about how proposed cuts to student aid would affect schools on the ground, NASFAA launched the [Budget Effect Estimator \(BEE\)](#) on our website in June 2017. The BEE allows financial aid administrators, campus colleagues, and the broader higher education community to simulate how the cuts proposed in President Trump's fiscal year 2018 budget would harm individual institutions nationwide.





# nasfaa's weekly podcast delivers "off the cuff" updates

by Allie Bidwell, NASFAA Reporter

It can be hard to keep up with what is happening on your own campus, let alone new developments in financial aid and broader higher education policy. To help keep members abreast of important events and changes stemming from the nation's capital, NASFAA in 2016-17 created its weekly podcast, "Off the Cuff."

The podcast started in September 2016 as a way for NASFAA staff to more regularly and informally connect with members. Each week, the NASFAA policy team—and occasionally a special guest—dig into the most important financial aid and higher education-related topics. They also give an insider's look into how legislative and regulatory decisions are made in Washington, D.C.

"Federal policy and regulations can be extremely complicated and can often move at breakneck speeds. We wanted to make it as easy as possible for our members to stay on top of these issues in an easily accessible way," said NASFAA President Justin Draeger. "We're happy to see this turn into another useful and important tool for aid administrators, who are constantly trying to navigate these complexities while keeping their students front and center."

From the resignation of the Office of Federal Student Aid Chief Operating Officer Jim Runcie and the sudden outage of the IRS Data Retrieval Tool to the latest on negotiated rulemaking and year-round Pell, Off the Cuff has covered it all in the past year. NASFAA members even got the chance to attend a live recording of the podcast at the 2017 National Conference in San Diego, where the team sat down with three fans who answered Off the Cuff trivia questions correctly. The audience voted to keep Michigan State University's Chandra Owen—one of those three fans—on stage as a guest host.

Over the last year, NASFAA has received more than 70 feedback submissions, with questions, comments, and thoughts from members across the country who have tuned in to the podcast.

"You guys make financial aid fun and my work week less lonely," said Vanda Chou, director of financial aid at the University of North Carolina-Chapel Hill School of Law. "I really enjoy how you've found a way to combine the important policy stuff with the random D.C. stuff and how you come across as friends chatting, instead of experts engaging in heated debates (even though I know you three/four can't possibly agree on everything). Keep the podcasts coming!"



# ppy implementation after one year

by Erin Powers, NASFAA Director of Communications

NASFAA saw the fruits of its labor this year as the U.S. Department of Education (ED) put “prior-prior year” (PPY) into place for students across the country applying for federal student aid.

Shifting to using PPY income information on the FAFSA—rather than information from the previous year, which is often not yet finalized when students are applying—has been a fundamental precept of NASFAA’s larger advocacy platform since 2013. At that time, a NASFAA task force, convened to examine and inform policy issues related to the reauthorization of the Higher Education Act, proposed the PPY policy idea in its final report.

NASFAA and others in the higher education community have worked tirelessly over the last few years to impress upon lawmakers the benefits shifting to PPY held for students and families. The association obtained multiple grants, conducted research, and published white papers on the expected results, stressing that the move would increase the FAFSA’s accuracy and give families an earlier and more accurate idea of their anticipated financial aid and college costs.

In a 2013 report, *A Tale of Two Income Years*, NASFAA used real student data to show the change would not significantly impact Federal Pell Grant awards for students with the highest financial need. Digging deeper into potential implementation concerns, NASFAA published its 2015 report, *Great Expectations: Implications of Implementing Prior-Prior Year Income Data on the FAFSA*, asserting that the benefits of the move would far surpass the possible hiccups that might stem from implementation. To keep the momentum going, NASFAA leveraged the help of its members in numerous *Advocacy Pipeline* events on Capitol Hill, where proponents of the move spoke directly to lawmakers about the widespread impact such a change would have on students at their respective institutions.

After many years of NASFAA and its members pushing the policy proposal forward, former President Barack Obama on September 13, 2015, took executive action to allow the use of tax information from two years prior on the FAFSA. Though the policy change was hailed as a win for students and families, following the announcement NASFAA members quickly *identified issues* that needed to be addressed to ensure a smooth implementation, including the following:

- Concerns about the increases in professional judgments;
- Overlapping use of 2015 information for two separate award years (2016-17 and 2017-18) and potential conflicting information;
- Timing changes, such as software releases (ED and third-party); state, regional, and national conferences (including Federal Student Aid); campus-based aid allocations; Pell Grant schedules; and high school nights;
- Changes in marital status for students or parents;
- State implications, such as funding, setting tuition, and use of prior-year income information vs. PPY; and
- Communication to students, families, and high schools about the change.

To quell these fears and help support a smooth transition to using PPY income and the Early FAFSA—which would become available in October rather than in January of the following year—NASFAA convened the *PPY Implementation Task Force*. Comprised of practicing aid administrators, the task force produced a number of resources to assist college administrators, described on page 18 of this report.

As the reality of the move to the Early FAFSA and PPY set in, a major concern remained among some advocates who saw the value in providing information to students earlier on, but worried that moving institutional admissions or financial aid application deadlines earlier could negatively impact lower-income students, who tend to apply for financial aid later in the process. However, findings from a *May 2017 survey* of NASFAA member institutions showed that among schools that provided admissions and/or financial aid application priority-filing deadlines for 2016-17 and 2017-18, the overwhelming majority did not change their deadlines. Schools that did change their priority deadlines indicated they did so to give students and their families more time to review aid offers.

“Schools are approaching prior-prior year cautiously and taking special care not to make changes that would discourage students from receiving all of the financial help they need,” said NASFAA President Justin Draeger. “While bringing PPY online during this transitory year has meant larger workloads for financial aid offices, we are pleased to report that our data is showing that this has gone relatively smoothly for students.”

# research

Increasing our understanding of financial aid issues to improve advocacy, assist members, and support informed legislation and policy

NASFAA's research initiatives strengthen the association's advocacy, membership, and strategic long-range plan efforts. This year's work focused on engaging in research collaborations with outside organizations to expand our research influence, as well as providing members with tools to assist them in better understanding how to use data and research. We increased our survey work, focusing on more member surveys about issues that aided our own advocacy and research efforts as well as collaborative advocacy and research work with external groups. We also presented new papers by researchers in the field in three issues of the *Journal of Student Financial Aid*. In addition, NASFAA remained committed to helping students displaced by the closure of their college or career school by accepting a grant to continue our work in that area through December 2018.

## Surveys

NASFAA surveys take the pulse of our members and others on key financial aid and higher education issues like prior-prior year, verification, technology, and student debt. We administered 17 surveys in 2016-17, including five surveys to support policy and research efforts and four surveys in conjunction with other groups, as well as eight internal-use surveys for evaluation and benchmarking. The results of these surveys aided initiatives both within and outside the association.

### Surveys That Support NASFAA's Advocacy and Research Efforts

- **Prior-Prior Year Implementation Survey** (November 2016)
- **Graduate/Professional Loan Limits Task Force Survey** (February 2017)
- **Annual Survey on Research Topics** (February 2017; results published in the *Journal of Student Financial Aid* editor's column)
- **Prior Prior-Year Implementation Task Force Wrap-Up Survey** (May 2017)
- **Administrative Cost Allowance Survey** (survey June 2017; results forthcoming in 2017-18).



### Surveys Performed on Behalf of or in Collaboration With External Groups

- **Impact of Verification on Low-Income Students and Families Survey** (August 2016), in collaboration with The Institute for College Access and Success (TICAS). This survey asked about the impact of verification on low-income students and families, as well as on financial aid administrators. TICAS incorporated the survey results into their publication, *On the Sidelines of Simplification: Stories of Navigating the FAFSA Verification Process*.
- **Financial Aid Technology Survey** (October 2016), in collaboration with Tyton Partners, the National Association for College Admission Counseling, and the American Association of Collegiate Registrars and Admissions Officers. This survey was one part of a larger research project led by Tyton Partners and funded by the Bill & Melinda Gates Foundation, examining the impact of financial aid technology at individual institutions. Tyton Partners included the results of this study in their publication, *Finding a Fit: The Evolution of Student-Centered Financial Aid*.
- **Loan Counseling Survey** (November 2016), in collaboration with TG and the Federal Reserve Board. This is a follow-up to previous work done by this collaboration; results are forthcoming in 2017-18. See our November 2016 report, *Student Loan Counseling, Challenges and Opportunities*, for more information on this work.
- **Annual Institutional Loan Survey** (June 2016), in partnership with The College Board. The College Board uses results from this survey to calculate institutional loan amounts shown throughout their *Trends in Student Aid* report each year. They will publish the next *Trends in Student Aid* report in fall 2017.

## Major Research Reports

In addition to our survey work, NASFAA worked on several major research reports, grant-funded projects, and collaborations between July 2016 and June 2017.

### NASFAA Research Reports

- **2017 NASFAA Benchmarking Report** (March 2017). This report presents findings from the 2016 NASFAA Benchmarking Survey, which updates the 1995-2016 reports. Key findings from this report included changes in salaries and the number of aid applications handled by financial aid offices, how the financial aid office fits within institutions' reporting structures, and financial aid administrators' relations with school administration. To view the entire report, visit <https://www.nasfaa.org/benchmarking-surveys>.

### Grant-Funded Projects

- **Market Research on Law School Student Aid Award Letters and Shopping Sheet Information** (funded by a grant from AccessLex). In this second report, published in September 2016, NASFAA's Consumer Information and Law Student Indebtedness (CILSI) Task Force used consumer testing to identify information on the financial aid award letter and ED's Shopping Sheet that could be modified to create a document that better assists students applying to or currently attending law school. The report appears at [https://www.nasfaa.org/policy\\_task\\_forces#consumerinfo](https://www.nasfaa.org/policy_task_forces#consumerinfo).
- **Grant to Help Support Students Displaced by Sudden Institutional Closure** (funded by Lumina Foundation, January 2017 – December 2018). In 2016-17, NASFAA recruited volunteer members to assist students displaced by institutional closure and launched the <http://NextStepsEd.org> website, where students can submit requests for help. Over the next two fiscal years, we will create a website where students can access information about closed-school discharge, produce a "lessons learned" paper to be shared with the Office of Federal Student Aid, and produce a "policy recommendations paper" to be shared with Congress. A Lumina Foundation grant is funding this research from January 2017 - December 2018. More information on this grant appears at [https://www.nasfaa.org/grant\\_to\\_help\\_support\\_students\\_displaced\\_by\\_sudden\\_institutional\\_closure](https://www.nasfaa.org/grant_to_help_support_students_displaced_by_sudden_institutional_closure).

## Collaborations

In addition to the surveys listed above, NASFAA collaborated with multiple groups and associations during 2016-17 to work on several important federal student aid issues.

- **Beyond 12.** NASFAA continued its partnership with Beyond 12 to offer assistance, using an online ticketing system, to students with questions related to borrower defense to repayment. This partnership was reshaped when NASFAA accepted a grant from Lumina Foundation to continue assisting these students over the 2017 and 2018 calendar years.
- **Council for the Advancement of Standards in Higher Education (CAS) Professional Standards for Higher Education.** NASFAA continued to serve on the CAS Board, providing feedback on standards for various postsecondary program areas. NASFAA also served on the committee to update the CAS general standards.
- **National Center for Education Statistics Technical Review Panels (TRPs).** Constituted of faculty and researchers in postsecondary education, representatives of national associations, and government representatives, TRPs provide advice and recommendations on the technical and substantive aspects of a particular study. In 2016-17 NASFAA research staff participated in TRPs for the following studies:
  - 2016/17 Baccalaureate and Beyond Longitudinal Study Second Panel (December 2016)
  - National Postsecondary Student Aid Study Administrative Collection 2018 (January 2017)

## Other Research Projects

NASFAA created [Research Resources for Use in Financial Aid Practice](#) to connect current and relevant research with financial aid practice. This online resource includes a reference area that financial aid administrators can consult to solve problems or reconsider current policies and procedures, both inside and outside the financial aid office. We will update this resource with new research as it becomes available with topics based on the results of NASFAA's annual "Research to Practice" member survey.

## Journal of Student Financial Aid

Now in its 48th year, the *Journal of Student Financial Aid* published three issues in 2016-17 covering topics ranging from college affordability and student debt to negative EFC and competency-based education. More than 40,000 visitors from 157 countries downloaded *Journal* articles this fiscal year—an increase of more than 6,000 from last year. All articles, as well as guidelines for manuscript submission, appear on the *Journal* micro-site at [https://www.nasfaa.org/Journal\\_of\\_Student\\_Financial\\_Aid](https://www.nasfaa.org/Journal_of_Student_Financial_Aid).

Top Five Downloaded Articles in 2016-17*	Total 2016-17 Downloads
<i>History of Financial Aid to Students</i> , by Matthew B. Fuller	5,319
<i>Debt and College Students' Life Transitions: The Effect of Educational Debt on Career Choice in America</i> , by Yeseul Choi	2,975
<i>Borrowing and Repaying Student Loans</i> , by Nicholas Hillman	2,460
<i>College on Credit: How Borrowers Perceive Their Education Debt</i> , by Sandy Baum and Marie O'Malley	1,240
<i>Financial Decisions among Undergraduate Students from Low-Income and Working-Class Social Class Backgrounds</i> , by Krista M. Soria, Brad Weiner, and Elissa C. Lu	950

\*Some articles are assigned to students as part of postsecondary coursework, increasing the number of downloads.

## Special Issue on Researcher–Aid Administrator Collaborations

In 2016-17, guest editors Justin Chase Brown (director of scholarships and financial aid at University of Nebraska-Lincoln) and Rajeev Darolia (assistant professor of public affairs and education at the University of Missouri) began compiling an innovative *Journal* special issue on applied research partnerships between financial aid professionals and academic researchers. The issue will go live on the *Journal* micro-site on November 1, 2017.

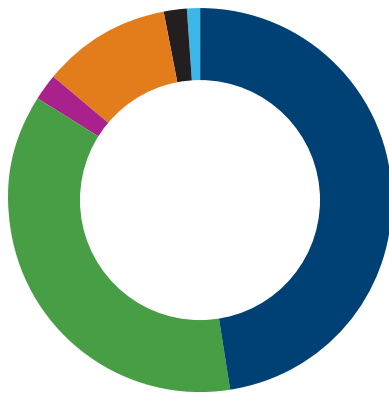
# finance

ensuring the most efficient and effective use of NASFAA’s financial resources

NASFAA’s Board of Directors and Financial Affairs Committee continue to work hand in hand to monitor NASFAA’s budget and expenses on a monthly basis, and to explore ways to diversify and build revenue while constraining costs whenever possible. This past fiscal year (July 1, 2016, to June 30, 2017), NASFAA devoted 76% of total expenditures to membership support, advocacy, communications and web efforts, conferences, and trainings—and just 12% to administrative and general

expenses. NASFAA spent an additional 12% on developing new projects, such as the new Policies & Procedures Builder module of the Compliance Engine (see page 19.) The 12% administrative outlay is the lowest we’ve seen—compared to 17% in FY16, 19% in FY15, and 17% in FY14—and is considerably less than the nearly 26% average for “general and administrative expenses” cited for organizations of NASFAA’s size by the American Society of Association Executives in its 2016 *Operating Ratio Report*.

Revenue



Sector		
Membership Dues	\$5,085,443	48%
Conference & Meetings	\$3,986,125	37%
Grants & Research	\$166,450	2%
Training & Programs	\$1,145,801	11%
Publications	\$10,202	<1%
Advertising	\$200,187	2%
Other	\$66,057	1%
<b>Total Revenues</b>	<b>\$10,660.265</b>	

Expenses



Sector		
Membership Support	\$728,387	8%
Advocacy	\$703,911	7%
Administrative & General	\$1,181,778	12%
Communications & Web Expenses	\$905,139	9%
Conference & Meetings	\$2,222,155	23%
Training & Programs	\$2,766,043	29%
New Program Development	\$1,138,173	12%
<b>Total Expenses</b>	<b>\$9,645,586</b>	

# my school just closed—what's next?

by Sydney Evans, Project Manager,  
NASFAA's Project to Assist Displaced Students


Imagine waking up one day with plans to attend school. You know the one—that school you've paid for and maybe even took out a loan to attend, the one you've been told would help advance your career and guarantee that dream job. Then, out of nowhere, you receive notice that the school—yes, YOUR school—has closed forever.

Now what?

This scene has been the difficult reality of at least 50,000 students across the country who have experienced school closures. Some students have even showed up to their institution to find locks and chains on the doors, with their class materials still inside. It's hard to even imagine just how frustrating, confusing, and disheartening it must feel to know that you are not only losing the time and effort you put into your coursework, along with any money you may have paid, but you also still owe debts on student loans—all to attend a school that no longer exists.

When a school closes, the U.S. Department of Education sends affected students a notification and a link to a webinar describing their options. But sometimes students need extra, personal guidance through this tough situation. With funding from Lumina Foundation, NASFAA is bridging that gap through a ticketing system—[NextStepsEd.org](https://www.NextStepsEd.org)—connecting these students with knowledgeable, caring financial aid administrators who can help them navigate the process.

The Assisting Displaced Students Working Group is a team of 14 financial aid administrators from across the country united by NASFAA to help students from closed schools deal with issues related to federal loan discharge eligibility, universal borrower defense, Federal Pell Grant eligibility restoration, and a variety of other financial aid-related concerns. Once students briefly explain their needs in the ticketing system, we forward the ticket to available working group volunteers who then walk the students through the appropriate next steps. Upon completion of the process, students can proceed with confidence knowing they have all the information they need to accomplish their goals.



The working group reaches students nationwide, even as distant as Hawaii, with the help of members like Tyrone Gadson, from Hawaii University. "It is great to see the lengths that NASFAA reaches by developing working groups like this, that include administrators like myself from over 5,000 miles away," Gadson said. "There has been nothing but gratitude from every student that I've had the chance to talk with. ...This working group has provided information to these students that may have not received information or options any other way."

Have we been effective? Seasoned financial aid administrator and volunteer Aesha Williams, from Illinois Institute of Technology, believes so. "The students I've been able to get in touch with have seemed very appreciative, for the most part, to get some straight answers and direction to help them figure out what options are available to them. They've been misled by others in the past, so I think speaking with someone with no agenda, who only wants to give them information so they can make the best choice as they move forward and provide them concrete steps to do so, is somewhat of a relief," she said.

Not every student who comes through our ticketing system will receive a loan discharge or Pell restoration. However, we can confidently say that our volunteers are helping those they can reach to navigate the process. We hope it means these students will eventually have the opportunity to continue their education and even obtain that dream job.

The working group is always looking for new ways to help and will continue to assist students from closed schools through December 2018. Tanya Patterson-Stanley, of New York Institute of Technology, said it best: "I believe we have been a great resource, but this is just the beginning of what needs to be done."

**To learn more about how you can get involved, contact Sydney Evans at [evanss@nasfaa.org](mailto:evanss@nasfaa.org).**

# communications

Serving as a forum on student financial aid issues—  
a key component of NASFAA's mission



NASFAA creates opportunities for meaningful discussion among members, the policy community, and higher education advocates using mediums like *Today's News*; NASFAA.org; social media channels; informal quick polls and surveys; press releases; media alerts; and op-eds submitted to national and trade publications. We are also committed to leveraging technology to maintain and expand services to members.

## Today's News

*Today's News*, NASFAA's daily email newsletter, has a circulation of nearly 22,000 subscribers and is consistently rated by members as the most valuable service NASFAA provides. NASFAA members rely on *Today's News* to receive the latest updates on student aid legislation, higher education trends, regulations, research, professional development opportunities, and job openings. As part of our original content offerings, NASFAA also has six popular feature series that appear occasionally in *Today's News*: [Student Aid Perspectives](#), [Ask Mr. Ethics](#), [Voices from the Aid Office](#), [MVP: Most Valuable Professional](#), [The Policy Brief](#), and [Poll the Pros](#). In addition, NASFAA launched a weekly podcast called [Off the Cuff](#) in late 2016.

## Top Today's News Content

Each year, NASFAA writes and publishes numerous original articles targeted specifically to the interests of financial aid administrators. Below is a list of the 10 most-read original articles, researched and written by NASFAA reporters, policy staff, and training staff between July 1, 2016, and June 30, 2017.

1. [Trump's Fiscal Year 2018 Budget Eliminates SEOG, Reduces FWS, and Raids Pell Surplus](#) (March 2017)
2. [IRS Data Retrieval Outage to Last Weeks, Causes Access, Verification Problems](#) (March 2017)
3. [ED Announces Verification Relief During IRS DRT Outage](#) (April 2017)
4. [A Closer Look at Assigning Summer Cross-Over Periods with Year-Round Pell, and Other Q&As](#) (June 2017)
5. [President Trump Proposes Historic Cuts to Student Aid in 2018 Budget](#) (May 2017)
6. [Spending Package Restores Year-Round Pell, Cuts Pell Reserves](#) (May 2017)
7. [2017-18 Verification and Conflicting Information](#) (July 2016)
8. [ED Releases Guidance for Implementation of Year-Round Pell Grants](#) (June 2017)
9. [PPY Implementation Task Force Offers Hints and Tips for Resolving Comment 399-Flagged ISIRs](#) (December 2016)
10. [ED Notes Sharp Increase in Pell Grant, Direct Loan Improper Payments](#) (November 2016)

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## Members Comment on Today's News

NASFAA encourages comments and discussion on its *Today's News* content. In 2016-17, our articles received 275 comments, averaging 23 comments per month. February saw 51 comments—the highest number for a single month this year. The following articles received the most comments in 2016-17:

- An article describing an ED update on the DRT outages
- A "Your Thoughts" article on how institutions handle 399 flags
- An article on the passing of Past NASFAA National Chair George Chin
- An article on President Trump's Fiscal Year 2018 Budget
- An article about a letter ED sent in response to a request from NASFAA and a handful of other associations for relief of verification burden for non-tax filers in the wake of the DRT outage
- A summary of a report from think tank New America arguing against limiting student borrowing



## Media Engagement

NASFAA works closely with the media to raise public awareness of the issues facing students, families, and institutions, as well as our policy positions and advocacy efforts. Media mentions of NASFAA soar when hot topics in financial aid emerge, as media outlets seek out NASFAA as a knowledgeable and trustworthy source. In 2016-17 alone, national and local media and trade publications mentioned and/or quoted NASFAA nearly 1,000 times.

### NASFAA Media Mentions July 1, 2016, to June 30, 2017

Original mentions (as opposed to reprints)	193
Reprints (republished or syndicated articles)	790
Total media mentions during this period	983

Media mentions surged in March 2017 in response to the unexpected IRS Data Retrieval Tool (DRT) outage and NASFAA's quick action to push out [a statement](#) when the tool went down. Mentions surged again later in the month when the U.S. Department of Education issued an [update about the DRT](#). In all, media outlets published 36 original articles in March mentioning or quoting NASFAA. Some of the articles in more prominent publications included "[IRS, Education Department Turn Off Tool in Financial-Aid Application on Fears of Data Breach](#)" in *The Wall Street Journal*, "[Students Scramble After IRS Takes Down Financial-Aid Tool](#)" in *Fox Business*, and "[A Fumble on a Key FAFSA Tool, and a Failure to Communicate](#)" in *The New York Times*. In addition to the DRT issue, some of the March 2017 media mentions resulted from a NASFAA press release on the Trump administration's budget blueprint that, as the press release explained, "focuse[d] heavily on boosting public safety and national security, generally at the expense of long-term investments like higher education."

A NASFAA press release, "[In Light of ITT Closures, NASFAA to Resume Collaboration to Aid Affected College Students](#)," also garnered significant media attention. It generated 28 original articles, and prominent media outlets like *The New York Times* and *The Washington Post* mentioned NASFAA in their reporting. In light of the closure of more than 130 ITT Educational Services, Inc. campuses in 38 states, NASFAA announced its resumed efforts to connect students displaced by campus closures with volunteers who are knowledgeable about financial aid and higher education.

"Sudden campus closures are detrimental to the lives and educational pursuits of students," NASFAA President Justin Draeger said in the press release. "We are thankful for financial aid administrators who are volunteering their time to help displaced students navigate their future pathways."

## Media Outlets Citing NASFAA in 2016-17

Here is a sampling of the media outlets and trade publications that cited NASFAA this year.

- Associations Now
- Breitbart
- CNBC
- CNN Money
- Consumer Reports
- Detroit Free Press
- Diverse: Issues in Higher Education
- Education Week
- FedScoop
- Financial Advisor Magazine
- Forbes
- Fox Business
- GoodCall
- Inside Higher Ed
- Marketplace
- MarketWatch
- Money
- NPR
- Pittsburgh Post-Gazette
- POLITICO
- Reuters
- The Associated Press
- The Atlantic
- The Christian Science Monitor
- The Consumerist
- The Hechinger Report
- The New York Times
- The Washington Post
- Time
- USA Today
- U.S. News & World Report
- University Business
- Yahoo! Finance



## NASFAA.org

NASFAA's website is an unparalleled source of news, training, tools, and resources for financial aid professionals, researchers, policymakers, and the media. NASFAA staff constantly update and enhance NASFAA.org to better meet member needs. The following are some of this year's most significant additions and updates:

- **The Budget Effect Estimator (BEE)** tool illustrates the potential impact budget cuts will have for students at colleges nationwide. A big part of the Fight 4 Financial Aid campaign resources, this tool spotlights the potentially devastating consequences of cuts to financial aid. See <https://www.nasfaa.org/bee>.
- **The Policies & Procedures Builder** module of the Compliance Engine helps financial aid administrators construct and maintain a centralized, thorough, and accessible policies and procedures manual. See <https://www.nasfaa.org/engine>.
- **Manage My Institution or Organization** allows members to easily update contact information and rosters for those at their institution. See <https://www.nasfaa.org/manage-organization>.
- **The Member-Generated Content Library** compiles member-submitted document samples and templates that other members can access, adapt, and use for their institution's needs. See [https://www.nasfaa.org/content\\_library](https://www.nasfaa.org/content_library).
- **Off the Cuff** presents a lively, unscripted view of hot financial aid and higher education-related topics in a weekly podcast hosted by NASFAA staff. In 2016-17, Off the Cuff produced 38 episodes, and the podcast continues to rise in popularity. See [https://www.nasfaa.org/off\\_the\\_cuff](https://www.nasfaa.org/off_the_cuff).
- **NASFAA U Preview**, part of the NASFAA U Testing Center, helps test-takers prepare for Credential Tests by responding to sample test questions, receiving instant feedback, and accessing recommended resources that increase the depth of their knowledge. See [https://www.nasfaa.org/testing\\_center](https://www.nasfaa.org/testing_center).
- The updated **NASFAA.org Help Center** now includes frequently asked questions, as well as a modernized and easier-to-use Membership Help form and membership applications. See <https://www.nasfaa.org/help>.
- The new **Careers at NASFAA** section posts information about NASFAA staff position openings and facilitates the application process. See [https://www.nasfaa.org/careers\\_at\\_nasfaa](https://www.nasfaa.org/careers_at_nasfaa).

**Website Indicators.** NASFAA's website has seen a steady increase in the number of site sessions (times people visited the site), pageviews, and site users since last year.

	2015-16	2016-17
Sessions	1,384,832	1,471,674
Pageviews	3,792,642	3,876,135
Site users	556,362	591,769

### Top Five Content Pages Visited in 2016-17

- 1) *Today's News*
- 2) 2017 Conference Microsite
- 3) State and Regional College Tuition Discounts
- 4) AskRegs
- 5) State Financial Aid Programs



## Technology Initiatives

In 2016-17, NASFAA moved to a new, external IT support company to optimize and better secure NASFAA's assets such as web and database servers, firewalls, and internal networks. To further improve functionality and security, NASFAA also moved from an older email management process to Microsoft services. To keep up with NASFAA's technology growth, the association plans to fill a new position—Technology Project Coordinator—in 2017-18.



## new membership tool: manage my institution/ organization



This year, NASFAA launched the **Manage My Institution/Organization** area on NASFAA.org to help members manage their institutional profile and roster. Here, primary and secondary contacts can add, remove, and modify access of users on their rosters. Primary contacts can now designate secondary contacts within the tool, and administrators at schools with multiple campuses can designate a user at each campus to assist with this management. Members can also edit contact information for the main and related campuses in this area, and the tool displays current membership status, subscriptions, and other organization-wide information for easy reference. As in the myNASFAA area, each screen provides a way to contact NASFAA's Membership staff directly for further assistance.

This update is part of a multi-phase project, launched in 2015-16, to deliver more customized, user-friendly, NASFAA-driven tools to our members. Work is underway on revisions to the NASFAA store and registration process, directories and Buyer's Guide, and login and password retrieval process, which will roll out to users in future releases.

# nasfaa unveils the new policies and procedures builder

Following the successful launch of NASFAA's Compliance Engine in July 2016, NASFAA rolled out a new module—The Policies and Procedures Builder (P&P Builder)—in January 2017 to further help financial aid administrators remain in compliance and avoid negative audit and program review findings. The P&P Builder guides users through the creation of a customized policies and procedures manual. Regulatory and other resources are merely a click away, tasks can be assigned to colleagues and managed through dashboards and comments, and users are notified of important updates. Manuals can be exported as formatted, printable documents for distribution.

Some of the many features added to the module since its release include a robust text editor and the ability to add images, perform a full-text search, and share content with coworkers (or keep private, as needed). The P&P Builder also makes it easy to transfer content to future manuals, where changes and areas to review are highlighted, and to move existing work forward to new versions so members can focus on just the areas needing updates without having to "reinvent the wheel."

Since the launch of the Compliance Engine and its P&P Builder module, nearly 1,000 checklists and over 700 policies and procedures manuals have been created. NASFAA offered the P&P Builder module to all members free of charge through June 30, 2017. Starting in July, those with NASFAA's Value Plus Membership package enjoyed continued access, and all other members could elect to add a subscription to the module onto their membership. Financial Aid Services, NASFAA's preferred transition provider, offers fee-based services to assist members with converting existing manuals into the P&P Builder.



**To learn more about the Compliance Engine and the new P&P Builder module, visit <https://www.nasfaa.org/engine>.**

# (re)-introducing year-round pell

by Brittany Hackett, NASFAA Reporter & Multimedia Coordinator

The Federal Pell Grant Program got an upgrade in 2017 with the restoration of year-round Pell and the issuance of guidance from the U.S. Department of Education (ED) on its implementation.

Congress restored a version of year-round Pell in its [spending package](#) for federal fiscal year (FY) 2017, which funds award year (AY) 2017-18. Although the agreement includes the restoration of year-round Pell, and maintains the 2017-18 maximum Pell Grant of \$5,920, it removes \$1.56 billion in funding for the Pell Grant Program.

“NASFAA applauds this much-needed change, which we have long championed.”

*Justin Draeger*

The decision to reinstate year-round Pell met with some resistance over concerns that the same administrative issues that plagued the first go-around, particularly relating to cross-over periods, would occur this time. However, new statutory language addressed many of those concerns. Statute now allows eligible students to receive up to 150% of their scheduled Federal Pell Grant award for an award year. Students must be enrolled at least half-time in the payment period for which they receive the additional Pell Grant funds in excess of 100% of their scheduled award. There is no eligibility requirement that students must be accelerating in an academic program.

In a [May 2017 letter to ED](#), NASFAA raised several questions on the implementation of year-round Pell, ranging from the exact implementation date to assigning crossover periods to safe harbors for early implementation. In initial guidance for the implementation of year-round Pell Grants, ED

confirmed that the grants will be payable only out of 2017-18 funds and associated need analysis. Students enrolled in periods of enrollment that crossed over July 1, 2017, whose institutions considered the crossover period to be part of the 2016-17 award year, were not eligible for additional Pell Grant funds for summer based on the 2016-17 need analysis.

In the previous version of year-round Pell, which ended after the 2010-11 award year, institutions were required to assign the crossover period to the award year that yielded the highest Pell payment to the student for the summer, regardless of any longer-term repercussions, such as exhaustion of the upcoming year's Pell eligibility. The current guidance considers the student's eligibility over the course of the two full award years in question, rather than only the crossover period.

In a [statement](#) issued at the time of the program's reinstatement, NASFAA President Justin Draeger wrote:

“The return of year-round Pell marks a step forward for many students pursuing a postsecondary degree, who were limited by the current Pell Grant Program. The way the Pell Grant Program is currently structured doesn't work for nontraditional students—those who may have entered the workforce and then come back to school or those who don't take the standard full course load every semester.”

Draeger continued, “NASFAA applauds this much-needed change, which we have long championed. We look forward to working with policymakers and implementers to ensure that the new structure will eliminate the administrative burden that year-round Pell created for financial aid administrators in its last iteration.”



# training & regulatory assistance

keeping members at the top of their game with comprehensive resources, tools, and training





## 17 Key Topic Areas of NASFAA U Training

- Administrative Capability
- Application Process
- Campus-Based Programs
- Cash Management
- Consumer Information
- Cost of Attendance
- Direct Loan Program
- Federal Pell Grant and Iraq and Afghanistan Service Grants
- Gainful Employment
- Need Analysis
- Packaging and Notification of Awards
- Professional Judgment
- Return of Title IV Funds
- Satisfactory Academic Progress
- Student Eligibility
- TEACH Grant
- Verification

“I have earned all 17 NASFAA U credentials, and have earned the clear majority of them after taking a NASFAA U online class. For my learning style, the online classes are the best way to learn and master the material. The opportunity to interact with colleagues, instructors, and written and other educational materials over an extended period is most beneficial. I was new to online learning before this experience. In my opinion, online NASFAA U classes are outstanding. I highly recommend them!”

*Dr. Michael Campbell,  
Ohio Technical College*

Providing professional development and services for financial aid administrators is a primary aspect of NASFAA’s overall mission. To achieve this goal, we offer training and tools that help members administer financial aid efficiently and in compliance with federal requirements. Our training materials and regulatory resources for members run the gamut of in-depth credential training, hot-topic webinars, online tools, and direct regulatory and compliance assistance.

## NASFAA U Credential Training

NASFAA U is a rigorous education program culminating in nationally recognized credentials in financial aid administration. Financial aid administrators at every level, from neophyte to experienced professional, can sharpen their skills in 17 key topic areas available in one of three formats: self-study guides, online courses, or state and regional authorized events. Upon completing a course, learners can choose to take a credential test to demonstrate mastery of the topic. Seasoned financial aid administrators who already “know the ropes” can also choose to demonstrate their expertise without additional coursework by qualifying for and passing a credential test. Details about NASFAA U appear at [https://www.nasfaa.org/NASFAA\\_U](https://www.nasfaa.org/NASFAA_U).

### NASFAA U Self-Study Guides

NASFAA U Self-Study Guides are the solution for time-constrained aid administrators who want to increase their knowledge and skills. The guides allow for independent study at the learner’s pace, providing the ultimate in flexibility and convenience. In the 2016-17 year, 682 individuals downloaded or purchased a self-study guide and worked through its detailed explorations of the selected topic.

### NASFAA U Online Courses

Each year, NASFAA U offers a portion of its curriculum through a series of facilitated online courses that provide a fixed-period, collaborative learning environment focused on specific topic areas. In 2016-17, our online courses received an average user satisfaction rating of 4.2 on a 5.0 scale, with student eligibility receiving the highest rating of 4.4. In 2017-18, NASFAA will offer nine online courses, including two opportunities to study verification.

2017-18 Online Course Schedule	Start Date	End Date
Overview	7/10/17	7/31/17
Direct Loans (8 weeks)	9/11/17	11/6/17
Verification	10/17/17	11/14/17
Overview	11/27/17	12/18/17
Verification	1/16/18	2/12/18
Return to Title IV (R2T4)	1/30/18	2/27/18
Cash Management	2/21/18	3/19/18
Administrative Capability	3/6/18	4/3/18
Need Analysis and Professional Judgment (8 weeks)	4/2/18	5/29/18

### State & Regional Partnerships: Authorized Events

Authorized Events allow states and regions to provide high-quality NASFAA U training without getting bogged down in the development and annual updates associated with creating training materials. Each topic includes an instructor's guide, slide presentation, participant workbook, participant study guide, and slide handouts. In 2016-17, all six regions and 32 states purchased Authorized Events for their associations, and nationwide, states and regions held more than 70 events using these materials.

### NASFAA U Credential Tests

Nationally recognized credentials provide evidence of a thorough understanding of critical concepts and processes in financial aid administration and the ability to function competently in those areas. NASFAA members can qualify to sit for credential tests by taking an online course, utilizing a self-paced study guide, attending a NASFAA authorized event, or demonstrating a specific level of experience. Because NASFAA designs these tests to require the application of principles, they encourage learning and help turn theory into practice. To date, more than 3,200 NASFAA members have earned a total of 8,700 NASFAA U credentials across 17 subjects, with verification, student eligibility, and the application process as the top three credentials earned.

## NASFAA Webinar Series

Throughout the year, NASFAA presents relevant, timely topics via webinars, which users can experience alone or with a group. The flexibility of both live and on-demand access makes NASFAA webinars a very popular and convenient learning method, and satisfaction ratings average 97 out of 100. This year, our most popular webinars were "Federal Income Taxes Demystified," "Citizenship Issues," and "Professional Judgment in a PPY World."

NASFAA's 2017-18 webinar series will present the following topics:

8/16/2017	Completing the FAFSA: 2018-19
9/20/2017	Federal Work-Study & Community Service
10/18/2017	Citizenship Issues Spotlight
11/1/2017	Verification 2018-19
12/6/2017	Direct Loan Issues Spotlight
1/10/2018	Cash Management: Disbursements
1/24/2018	Student Eligibility Spotlight
2/21/2018	The Ethics of Enrollment Management
3/14/2018	Trending Legal Issues in Financial Aid
4/18/2018	Student Financial Wellness in a Credit Card World
5/16/2018	Return of Title IV with Modules
6/6/2018	Top 5 Compliance Issues and How to Avoid Them

See [https://www.nasfaa.org/2017-2018\\_webinars](https://www.nasfaa.org/2017-2018_webinars) for more information about this year's webinars.

## Standards of Excellence

Objective, confidential peer reviews that assess institutions' delivery of student financial aid—this is NASFAA's Standards of Excellence Review Program (SOE). NASFAA's SOE team, composed of currently practicing financial aid professionals with extensive experience in the field, delivers a comprehensive evaluation of financial aid operations and helps ensure compliance at every level. Through SOE reviews, institutions reduce financial liability, meet enrollment goals, maintain a positive reputation, and more. Customized reports highlight strengths, identify compliance exceptions, explore best practices, and recommend improvements.

In addition to offering full review services, in spring 2017 NASFAA launched the new Consumer Information Assessment, which focuses on compliance with disclosure and reporting requirements in nearly 20 different areas across campus. Both programs offer the benefit of colleague experience and collaboration. In 2016-17, NASFAA completed 14 full reviews and four Consumer Information Assessments.

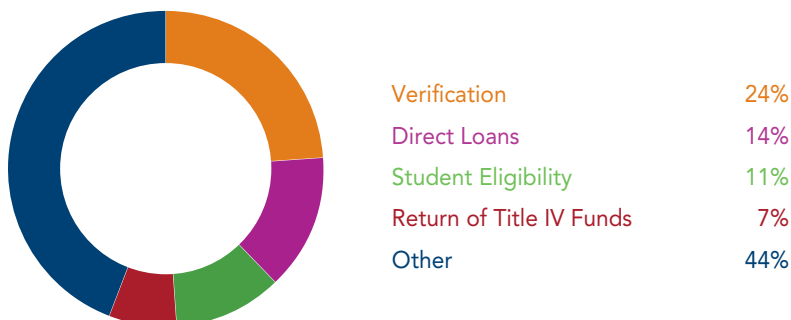
To learn more or request a SOE Review or Consumer Information Assessment, see <https://www.nasfaa.org/SOE>



## NASFAA AskRegs and Knowledgebase

The AskRegs question-and-answer service, along with the supporting AskRegs Knowledgebase, are among NASFAA’s most utilized member benefits. At any time of day or night, members can search a library of questions asked by their colleagues and ask a specific regulatory or legislative question if they cannot find the answer they need. Each month in 2016-17, NASFAA members searched the knowledgebase an average of 43,000 times with an average of 26,000 articles viewed, and NASFAA staff responded to an average of 360 questions from members. The most-searched topics this year included “399 Codes” and the verification of non-filing requirements for dependent students. More information on AskRegs appears at [https://www.nasfaa.org/askregs\\_overview](https://www.nasfaa.org/askregs_overview).

Percentage of AskRegs Questions Asked by Category in 2016-17



“[AskRegs] is easy to use, private, and thorough. It also provides a level of anonymity not found on listservs or by asking the Department of Education directly. You can expect straight and quick responses without all the legalese found in the Handbook or in Dear Colleague letters. It is my number one go-to resource for everything financial aid!”

*Annamarie Bouse, Rutgers University*



“I was impressed by the depth the review went into at the financial aid office, but also the breadth of the review with key partners outside of financial aid, including addressing strategic initiatives affecting multiple offices. We worked with campus leadership and governance councils so everyone involved understood the review and why it was being conducted. The peer review team was experienced and understood the institutional dynamics and framing issues appropriate to various audiences. The measure of success is that the financial aid staff embraced the review and was excited to make changes based on the report. I feel the review really brought the unit together after a difficult period.”

*Dr. Joe H. Sherlin Jr., vice president for student affairs, East Tennessee State University*

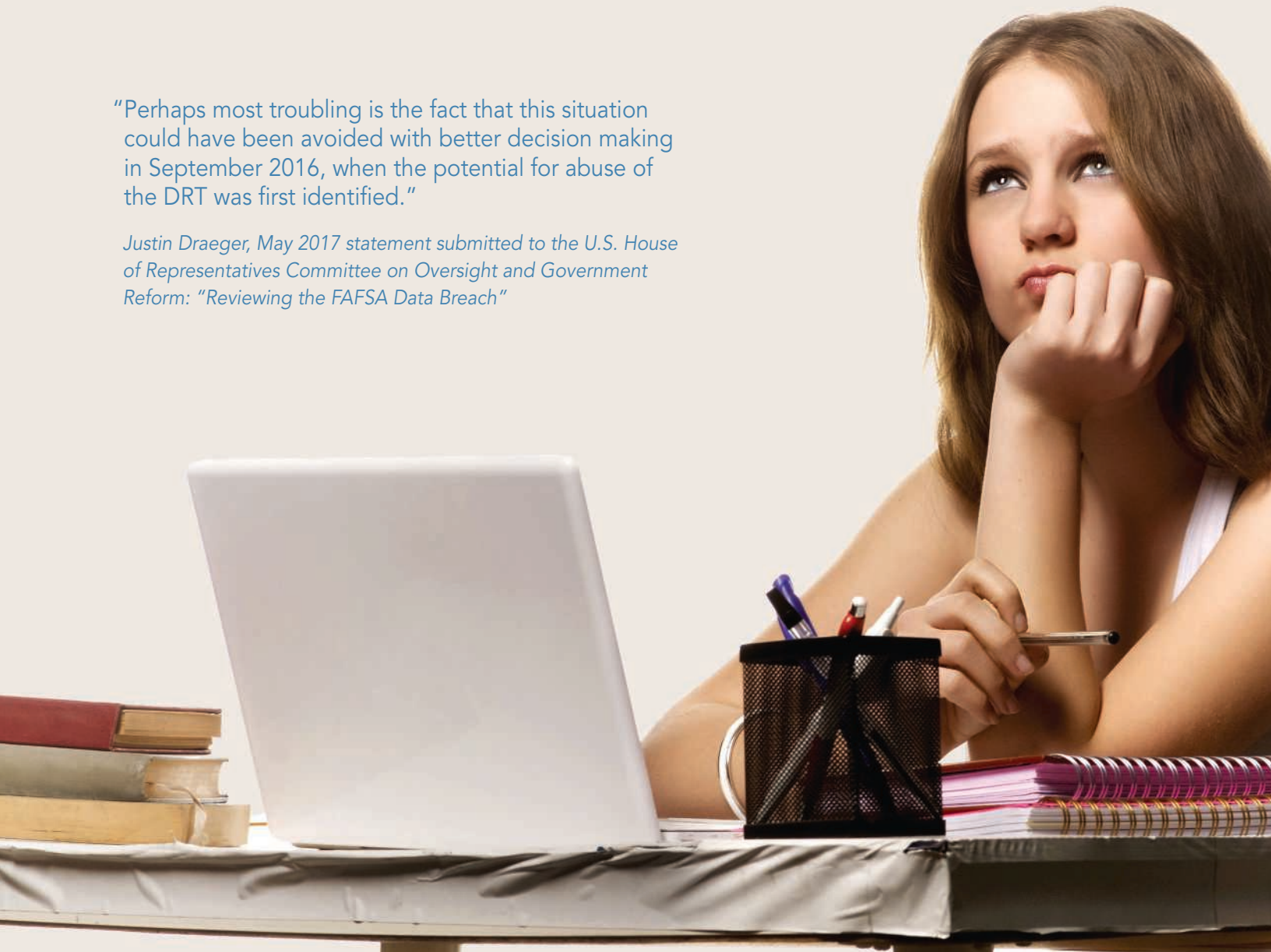


# in a year of change, IRS DRT outage causes chaos

by Allie Bidwell, NASFAA Reporter

"Perhaps most troubling is the fact that this situation could have been avoided with better decision making in September 2016, when the potential for abuse of the DRT was first identified."

*Justin Draeger, May 2017 statement submitted to the U.S. House of Representatives Committee on Oversight and Government Reform: "Reviewing the FAFSA Data Breach"*



The financial aid community was thrown for a loop this year when the U.S. Department of Education (ED) and IRS abruptly decided to deactivate the IRS Data Retrieval Tool (DRT), which millions of college students use each year to submit their financial aid applications.

The tool allows student and parent applicants to transfer their tax information directly from the IRS database into their FAFSA applications and is considered a first step in laying the groundwork for further FAFSA simplification efforts. It was nonfunctional for about a week in early March before either federal agency **acknowledged** the sudden outage. In a subsequent joint statement, ED and the IRS said the tool could be down for "several weeks" and had been taken offline due to security threats. Initially, the agencies offered no set timeline for when the tool would be restored.

The sudden outage and vague timeline for finding a solution left financial aid professionals particularly concerned about how the outage would impact students who were facing looming deadlines to submit their FAFSAs, and whether the absence of the tool for remaining applicants would cause an increase in verifications.

NASFAA President Justin Draeger said, in a **March 2017 letter** submitted to Education Secretary Betsy DeVos and then Chief Operating Officer of Federal Student Aid Jim Runcie, it was understandable that "legitimate security concerns" may have led to the tool's deactivation, but that ED should provide relief for students, parents, and financial aid professionals in the meantime. He called on ED "to take immediate steps to ease application and verification burdens that will fall squarely on students, potentially delaying or complicating their application process, not to mention increasing work on college campuses that could lead to delays and backlogs." Nearly two months after the tool went offline, **ED announced** it would take measures to provide relief to students, families, and financial aid administrators struggling due to the tool's outage. Those measures applied to verification requirements for the 2016-17 and 2017-18 award years.

The announcement explained that rather than collecting tax transcripts, ED would permit institutions to consider a signed paper copy of the 2015 IRS tax return for verification documentation. Students selected for verification of non-filing would no longer be required to provide documentation from the IRS or other tax authorities to show they, their spouse, or their parents did not file a tax return. However, ED still required those students to provide a signed statement "certifying that the individual has not filed and is not required to file a 2015 income tax return," as well as a document listing the amount and sources of any income from that year. They were also required to submit a copy of a W-2 form (or an equivalent document) for any source of employment from that year.

Over the next several weeks, higher education advocates, financial aid professionals, and lawmakers pressed both ED and the IRS to find a way to make the tool available again as soon as possible. By May, ED officials publicly stated a plan was in place to bring the tool back online. During a **congressional hearing** early in the month, Runcie said the tool would be restored with new security measures in place.

In a statement submitted for the hearing, Draeger wrote, "While the IRS was able to identify 100,000 individuals impacted by the data theft, it may not be possible to measure the impact of the DRT outage on students who may have missed a financial aid deadline or never even completed a financial aid application because of this issue, and whose college plans may have been compromised as a result." He continued, "Perhaps most troubling is the fact that this situation could have been avoided with better decision making in September 2016, when the potential for abuse of the DRT was first identified."

ED brought the tool back online in early June for borrowers applying for or recertifying their incomerdriven repayment plans. As of this writing, ED plans to make the DRT available for use for the 2018-19 FAFSA cycle beginning on October 1, 2017, but the new security provisions will limit the information that displays to the applicant.



# 2017 nasfaa national conference

Uniting financial aid professionals to teach, learn,  
network, and share best practices



**WHY I**  
**#Fight4FinAid**



**STUDENTS**

 NASFAA

NASFAA's National Conference is the premier event serving the student financial aid community. Financial aid professionals from across the nation arrive at the conference each year to increase their knowledge, network with colleagues, and discover the latest requirements, trends, and strategies in student aid.

ABC News correspondent John Quiñones opened this year's conference, held June 26-29, 2017, in San Diego, CA, with inspiring words about struggling against injustice. A first-generation college student, Quiñones recounted a few of the obstacles he overcame to achieve his dream to become a journalist and reminded the audience of the crucial role played by financial aid administrators.

"My heart goes out to each and every one of you," he said. "For you, this is not just a game of dollars and numbers. ... Sometimes you find yourselves in those ethical gray areas. That's because you're catalysts for change. You rescue these students by taking the time to listen. You are literally changing people's lives."

Other conference highlights included a U.S. Department of Education update with Jeff Baker and Lynn Mahaffie, policy updates by NASFAA President Justin Draeger and NASFAA Vice President Megan McClean Coval, the passing of the gavel from 2016-17 National Chair Lisa Blazer to 2017-18 National Chair Billie Jo Hamilton, a performance by the San Diego State University Marching Aztecs drumline, and a Fight for Financial Aid rally.

This year, the conference featured 80 interest sessions led by a total of 180 presenters and moderators. Four distinct tracks—advocacy, serving as a forum, professional development and management, and training—reflected NASFAA's overall mission. Each track included sessions within six subcategories:

- Compliance
- Enrollment and Retention
- Graduate and Professional Issues
- Leadership/Managers
- Research and Data Analysis
- Regulatory Implementation

Nearly 2,300 people registered for the 2017 conference, 77% of whom were from institutions. Nearly 30% of NASFAA's institutional members and 60% of NASFAA's associate members (business partners) were represented at this year's conference. More information on the 2018 National Conference appears at <https://www.nasfaa.org/conference>.



"I had a great first NASFAA conference! The location was beautiful and everything was so organized. I loved using the app! Thank you to everyone for their hard work. I hope I am able to attend another NASFAA conference in the future!"

*(A first-time conference participant)*

"Always an energizing professional development opportunity, and a wonderful opportunity to reconnect with colleagues."

*(A conference participant)*

"This conference was awesome, informative, and relative to everyday use. Great conference!"

*(A conference participant)*



# nasfaa awards

Honoring excellence in service to students,  
higher education, and the financial aid community



*The family of the late George Chin accepts his Lifetime Achievement Award from NASFAA President Justin Draeger (L) and 2016-17 National Chair Lisa Blazer (R).*



*Dr. Laurie Wolf accepts the Lifetime Achievement Award.*

Each year at the National Conference, NASFAA presents awards to members of the financial aid field and higher education community who exemplify excellence.

This year, NASFAA honored the following 15 recipients during the conference.

## Lifetime Achievement Award

The highest award NASFAA bestows, this award recognizes outstanding achievements and contribution by a NASFAA member.

**George Chin (posthumous)**, former university director of student financial assistance for the City University of New York and former senior federal policy consultant at the American Association of State Colleges and Universities. Chin served as NASFAA 2004-05 national chair, as well as president of NYSFAA and EASFAA and as a member of the Board of Trustees for the New York State Higher Education Service Corporation. He was perhaps best known at the national level for his firm grasp of both the theory and practice of student financial aid. Chin passed away in February 2017, and NASFAA is deeply grateful for the impact he had on the financial aid community.

**Dr. Laurie Wolf**, retired former executive dean of student services for the Des Moines Area Community College (DMACC). Wolf served as 2010-11 NASFAA national chair and has been a leader in NASFAA's reauthorization and legislative efforts. Perhaps best known as a student advocate, Wolf has been a prominent voice for underserved populations and particularly for "DREAMers."

## The Allan W. Purdy Distinguished Service Award

This award recognizes contributions in the furtherance of NASFAA's goals.

**Dr. Lisa Blazer**, senior associate vice president for student affairs at the University of Texas at San Antonio (UTSA). In addition to devoting 25 years to financial aid and admissions, Blazer has served as NASFAA's 2016-17 national chair, president of TASFAA and SWASFAA, and a key member of several NASFAA committees including Association Governance, Finance, and Research.



*Dr. Lisa Blazer accepts the Allan W. Purdy Distinguished Service Award. Shown with Past National Chair Dan Mann, 2017-18 National Chair Billie Jo Hamilton, and President Justin Draeger.*

## Meritorious Achievement Award

NASFAA presents this award to an individual who has made either one or more significant contributions to NASFAA or the profession.

**Brett Lief**, former president of the National Council of Higher Education Loan Programs and former assistant vice president for student aid and policy for the National Association of Independent Colleges and Universities. Lief's dedication to students has included service as a financial aid administrator, at the NJ Department of Higher Education, at the National Association of Independent Colleges and Universities (NAICU), and as president of the National Council of Higher Education Loan Programs (NCHELP). He has often presented federal updates at state, regional, and national financial aid conferences and is currently the chief strategic advisor for Windham Professionals.

**Judith Lewis Logue**, director of financial aid at the University of San Diego. During Logue's 53-year career in financial aid, her mission and highest priority have been to ensure every student has both equal access to and the opportunity to attain a postsecondary education. She has been very active in her service to both NASFAA and the financial aid community.



*Brett Lief accepts the Meritorious Achievement Award.*

## Honorary Membership Award

NASFAA selects recipients of this award in recognition of outstanding contributions over a significant period by a non-NASFAA member.

**Jeff Baker**, U.S. Department of Education Federal Student Aid policy liaison and implementation director. With over 35 years in the student financial aid field, Baker has made significant contributions to the U.S. Department of Education, students, schools, states, and regions. NASFAA previously honored Baker with its Meritorious Achievement Award and the NASFAA Regional Leadership Award for WASFAA. He retired this July 2017 after a long and distinguished career in public service, and his deep knowledge and commitment to students will be missed by his many friends and colleagues.



*Judith Lewis Logue accepts the Meritorious Achievement Award.*



Jeff Baker accepts the Honorary Membership Award.



Dr. Nicholas Hillman accepts the Robert P. Huff Golden Quill Award.



Regional Leadership Award winners (center, L-R): Jeffrey Dennis, Mindy Bergeron, Paula Luff, and Andrew Hammontree.



Innovative Gold Star Award winners.

## The Robert P. Huff Golden Quill Award

Recipients of this award are chosen for their contributions to the body of research on student financial aid.

Dr. Nicholas Hillman, associate professor, University of Wisconsin-Madison. Hillman's research has focused on the relationship between financial aid and educational opportunity, particularly for underrepresented students. His work on performance-based funding has challenged conclusions among funders and policymakers that the policies are effective. He served NASFAA admirably as associate editor for the *Journal of Student Financial Aid* from 2011 to 2015.

## Regional Leadership Awards

Recipients of these awards must have exhibited high integrity and character, shown creative leadership, and inspired and encouraged others to actively participate in professional development. One award is given in each of six regions:

- **EASFAA** – Brian Lemma, associate director of financial aid, Georgetown University
- **MASFAA** – Paula Luff, associate vice president, enrollment services, DePaul University
- **RMASFAA** – Carolyn Halgerson, director of financial aid, South Dakota State University
- **SASFAA** – Jeffrey Dennis, director of financial aid, Greenville Technical College
- **SWASFAA** – Andrew Hammontree, director of financial aid, Francis Tuttle Technology Center
- **WASFAA** – Mindy Bergeron, director of financial aid, John F. Kennedy University

## Gold Star Award

This award recognizes innovative ideas in the financial aid arena.

The California Community College Chancellor's Office, honored for "California Community Chancellor's Office Financial Literacy Initiative." The project works on life skills students need to succeed through financial literacy knowledge and financial wellness.

California State University, Sacramento (CSUS), honored for "Financial Aid Meter for Students." CSUS's Financial Aid Meter provides students and financial aid advisors a way to quickly determine how many semesters of eligibility the student has remaining in financial aid programs, so they can match their academic plan to their remaining financial aid eligibility.





# nasfaa leadership & legislative conference & expo

Propelling financial aid leadership skills to the next level

Each year, financial aid professionals from across the nation gather in Washington, D.C., to focus on sharpening their leadership and management skills. The 2017 NASFAA Leadership & Legislative Conference & Expo attracted 302 financial aid professionals from across the country to participate in one of four leadership pathways:

- **Association Management.** Targeted to new and aspiring regional and state association leaders, this pathway offers participants the skills and insights they need to lead effectively while navigating the legal and financial issues that come with these roles. Seventy-two members attended this pathway, which NASFAA has offered for 45 years.
- **New and Aspiring Aid Directors.** In this pathway, those new to directing an aid office and those seeking office leadership roles learn from tenured aid professionals how the director role fits on campus, their best practices and missteps, and the secrets to their success. Sessions address the “hows” of managing an aid office, networking, and advocating for students. Seventy-eight participants attended this pathway.
- **Fundamentals of Enrollment Management.** This introduction to enrollment management covers basic principles and their application for improving student retention and success, as well as current trends in enrollment management. Seventy-two members attended this pathway in 2017.

- **Strategic Enrollment Management.** Financial aid administrators and enrollment managers take a deep dive into strategic enrollment management issues like tuition revenue, discounting, packaging, and tactical methods for deploying enrollment management strategies that align with institutional enrollment goals. Eighty members participated in this pathway, new for 2017.

This annual event always wraps up with a significant NASFAA presence on Capitol Hill, as most conference attendees schedule visits with their representatives in both chambers of Congress. It is an exciting opportunity for members to be active participants in the legislative process.

Information on the upcoming 2018 Leadership & Legislative Conference & Expo appears at <https://www.nasfaa.org/Pathways>.



# in pictures: the 2017 nasfaa national conference

## Page 35

- A1. 2017 DME Intern Brianna Hayes urges members to #Fight4FinAid at the San Diego rally.
- A2. Federal Student Aid Policy Liaison and Implementation Director Jeff Baker expresses his gratitude for the Honorary Membership Award and describes his post-retirement plans to serve as a Peace Corps volunteer in Macedonia.
- A3. The conference opens to the percussive pyrotechnics of the San Diego State University Marching Aztecs drumline.
- A4. Justin Draeger chats with two NASFAA members.
- A5. Rally buttons express NASFAA's strong support for protecting student aid from federal budget cuts.
- A6. Registration is quick and easy.
- A7. Megan Coval, NASFAA vice president of policy and federal relations, gets members pumped up for the upcoming budget fight to protect federal student aid funds at the #Fight4FinAid rally.

## Page 36

- B1. Dr. Nicholas Hillman and his University of Wisconsin colleagues celebrate his Robert P. Huff Golden Quill Award.
- B2. Lynn B. Mahaffie, U.S. Department of Education deputy assistant secretary for policy, planning, and innovation, answers questions during the federal update.
- B3. NASFAA members share food and friendship in the Exhibit Hall.
- B4. 2016-17 National Chair Lisa Blazer passes the gavel to 2017-18 Chair Billie Jo Hamilton.
- B5. NASFAA President Justin Draeger addresses the conference audience.
- B6. Three NASFAA members show why they fight for financial aid.

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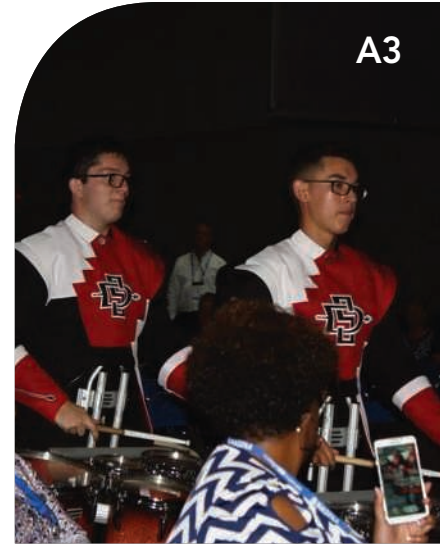
- C1. ABC News Correspondent John Quiñones delivers an inspirational keynote address.
- C2. More than 2,000 conference attendees anticipate the start of a general session.
- C3. Discovering new products and services at the NASFAA booth.
- C4. Billie Jo Hamilton delivers her first remarks as 2017-18 National Chair.
- C5. Audience members (L-R) Chandra Owen, Brenda Hicks, and Kelly Schneider join NASFAA staff for a live recording of the Off the Cuff podcast.



A1



A2



A3



A4



A5



A6



A7





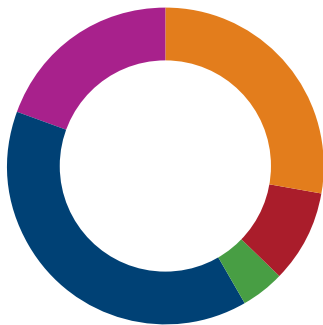


# membership

Serving those who help students and families to achieve their higher education goals

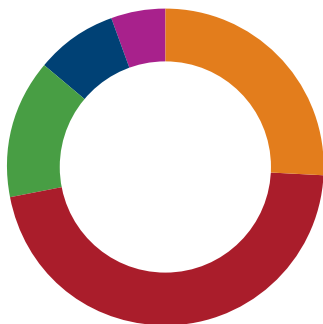
For more than a decade, NASFAA's member retention rate has held steady above industry averages. In both 2015-16 and 2016-17, the association retained 95% of its members, compared to a low of 94.6% in 2009-10 and a high of 97.7% in 2008-09. Overall membership numbers continue to decline by relatively small percentages each year, primarily due to institutional budget constraints and/or school closings or mergers. This year, we experienced a less than 2% decrease in membership (51 total institutions).

The NASFAA Board decided to hold dues steady in 2017-18 to encourage new memberships and renewals. Since many member institutions have upgraded their membership packages to utilize add-on benefits, NASFAA continues to exceed its membership budget projections.



## NASFAA Institutional Members (by Sector)

Community Colleges	28.0%
For-Profit	9.3%
Graduate/Professional	4.5%
Nonprofit	38.8%
Public 4-Year	19.3%



## NASFAA Institutional Members (by Institution Size)

Under 1,000	25.9%
1,000-4,999	46.2%
5,000-9,999	14.0%
10,000-19,999	8.4%
20,000 and Above	5.4%

# movers & shakers

NASFAA members are always advancing, whether enhancing their skills in their current roles, accepting promotions or job changes, or discovering new pathways as retirees. Here are a few of the NASFAA members who made changes in their professional lives in 2016-17.



*Deborah Altsher*

## Promotions, Job Changes, Awards, and Other Achievements

**Sue Allmon** recently earned the degree of master of jurisprudence from McKinney School of Law, Indiana University, Indianapolis. She has served in the financial aid profession for 32 years.

**Deborah Altsher**, who has 25 years of experience in financial aid, is now director of financial aid for Massachusetts General Hospital Institute of Health Professions. She formerly served as director of financial aid for Framingham State University.

With 26 years of service in financial aid, **Phil Asbury** is now university director of financial aid at Northwestern University. He previously served as deputy director of financial aid at the University of North Carolina at Chapel Hill.

**Tracy Ballard**, with seven years' experience in student financial aid, has been promoted from financial aid assistant to loan coordinator at Amarillo College.

University of North Georgia promoted **Janice Balte** from senior financial aid counselor to associate director. Janice has worked in the financial aid profession for 16 years.

**Daniel Barkowitz** is now assistant vice president for financial aid and veterans' services at Valencia College. He has served in the financial aid field for 29 years.



*Phil Asbury*



*Janice Balte*



*Daniel Barkowitz*





Brad Barnett

**Brad Barnett**, who has 21 years of experience in financial aid, received a promotion from senior associate director to director of financial aid at James Madison University.

**Carla Brewer** is now assistant director of counseling and training at Anderson University. She previously served as a financial aid counselor at Tri-County Technical College. Brewer, who has worked in financial aid for 13 years, recently received SCASFAA's 2017 Emerging Leader Award.

With 12 years of service in financial aid, **Kathryn Credle**, former financial aid counselor II at NOVA Southeastern University, is now assistant director of financial aid at Goodwin College.

After working as associate director for the University of Wisconsin-Madison, **Michelle Curtis**, who has been in student aid for more than 22 years, has returned to Minnesota to serve as associate director of compliance, scholarships, and athletic aid. She said, "I'm thrilled to be back to my home state and birthplace ... and there's the added bonus of staying in the Big 10 and MASFAA!"

Formerly the enrollment services officer at the University of Rhode Island, **Melissa Donahue** is now associate director of financial aid, client services at Rhode Island College. Melissa has worked in financial aid for 16 years.

Binghamton University promoted **Patricia Donahue** from associate director of financial aid and student records to director of financial aid operations. Patricia has worked 26 years in the financial aid profession.

**Angela Fowler** is now associate director for systems and reporting at Anderson University. She has 26 years of experience in financial aid and previously served as associate director of financial planning at Converse College.

Quinnipiac University awarded **Odette Franceskino** its Excellence in Service to Students Award. Students nominate recipients for this prestigious award, which recognizes those who reach far beyond their standard responsibilities to greatly enhance the student experience. Odette is director of financial aid for Quinnipiac University School of Law, and has worked in the financial aid field for 21 years.

**Victoria Goeke** received a promotion from assistant vice president to associate vice president of financial aid at the College of Southern Nevada. Victoria has served as a member of the financial aid profession for 38 years.

The Colorado Association of Financial Aid Administrators honored **Nancy Gray** with its Hall of Fame Award. Nancy is executive director of financial aid at Aims Community College and has worked in student aid for 26 years.

**Philip Hawkins**, former director of financial aid at the University of West Georgia, is now director of financial aid at George Washington University Law School. He has served in financial aid for 15 years.



Carla Brewer



Michelle Curtis



Odette Franceskino



Angela Fowler



Philip Hawkins



*Jessica Herrick*

With 18 years of experience in the financial aid profession, **Jessica Herrick** has been promoted from assistant director to director of financial aid at Montcalm Community College.

**Angela Karlin** is now assistant vice provost, financial aid and scholarships, for the University of Kansas. She previously served as director of student financial assistance at the University of Central Missouri, and has 14 years of experience in financial aid.

**Anna Kopit**, former financial aid director at Bramson ORT College, is now the compliance officer and customer service coordinator for ASA College. Anna has 26 years of experience in financial aid.

**Melet Leafgreen** is now director of student financial aid at UT Southwestern Medical Center. She previously served as associate director at the University of Texas at Arlington and has 17 years of experience in financial aid.

Former Senior Financial Aid Advisor **Fares Magesa** is now assistant director of student accounts at Andrews University. Fares has 10 years of experience in the financial aid profession.

**Melissa Moser**, now executive director of financial aid and Title IV compliance at Pima Community College District, previously served as financial aid director at Coast Community College District. She has been working in student financial aid for 16 years.

With 33 years of experience, **Ellen Neel** has been promoted from director of financial aid to director of federal compliance at Glendale Community College.

The Massachusetts Association of Student Financial Aid Administrators honored **Eileen O'Leary**, vice president of student financial assistance at Stonehill College and 2015-16 NASFAA national chair, with its Edward M. Kennedy Public Service Award in July 2017.

With 21 years of financial aid service, **Heather Patenaude**, former director of financial aid for Simmons College, is now director of financial aid for Mohave Community College.

**Andrew Rouhier**, former associate director of financial aid compliance at Wright State University, is now associate director of financial aid operations at the University of Dayton. He has 11 years of experience in financial aid.

**Tatiana Sampler** has been promoted from trainer to manager at Grand Canyon University. She has served in the financial aid profession for more than five years.



*Angela Karlin*



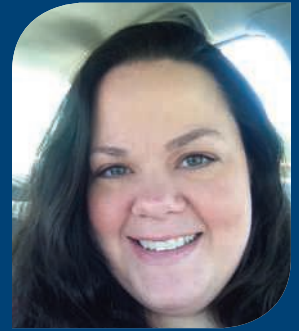
*Anna Kopit*



*Fares Magesa*



*Andrew Rouhier*



*Melet Leafgreen*



*Ellen Neel*



*Tatiana Sampler*



J. (Vinny) Vincent-Dunn

**Joseph Sciame** is celebrating 55 years of service in higher education and financial aid. During his long career at St. John's University, where he now serves as vice president for community relations, Joe has led NYSFAAA and EASFAA, and served as 1987-88 NASFAA national chair. He said, "Serving as national chair was one of the highlights of my life career in higher education." He currently works as a consultant for schools and presents at more than 10-20 financial aid nights and events annually.

Attain LLC Financial Aid Management and Student Services (FAMSS) promoted **Julie Setzer** to senior consultant from her previous role as consultant. Julie has 29 years of experience in student financial aid.

**Rick Snodgrass**, manager of financial aid services at Embry-Riddle Aeronautical University, earned a master of science in leadership degree with distinction from Embry-Riddle Aeronautical University Worldwide. He has served in student financial aid for seven years.

**J. (Vinny) Vincent-Dunn**, former associate director of financial aid at Fontbonne University, is now director of financial aid at Franklin College. Vinny has been in the financial aid field for nine years.

**Ann Whitmer**, who has served in financial aid for 29 years, is now a senior consultant with Ruffalo Noel Levitz. She previously worked as director of student financial services at Albion College.



Joseph Sciame



Ann Whitmer

## Retirement

After serving in financial aid for 34 years, **Ruth Higgins** has retired as senior specialist at Saddleback College.

**Barbara Miller** has retired as assistant vice president at Stevenson University after 23 years of service in financial aid. She said, "Through my entire career in higher education, I have been very fortunate to basically do just about everything I have ever wanted to do. Financial aid has certainly had some challenges over the years, but the rewards have been more than I can have imagined. I feel so fortunate to know I now have friends all over the country and appreciate all the help that was given to me over the years, the fun times we had at conferences, and most of all, the memories we shared. It truly has been a pleasure!"

2015-16 National Chair **Eileen O'Leary** announced her retirement as assistant vice president of student financial assistance at Stonehill College after 34 years of service in financial aid.

After 46 years in financial aid, **Betty Schumacher** announced her retirement as Valley City State University's student financial aid director.

Associate University Director of Financial Aid **Cheryl White**, of Rutgers University, announced her retirement after approximately 40 years in student aid.

After 40 years in financial aid, Muskingum University Vice President of Enrollment **Jeff Zellers** announced his retirement.



Barbara Miller



Eileen K. O'Leary



Jeff Zellers



Betty Schumacher



# the dallas martin endowment

The NASFAA Board of Directors established the Dallas Martin Endowment (DME) for Public Policy and Student Aid to help cultivate the next generation of student aid advocates. Each year after a competitive selection process, NASFAA awards a summer internship in Washington, D.C. to an upper-division undergraduate or graduate student interested in financial aid policy and research. DME interns experience an intensive crash course in federal financial aid policy, working side-by-side with NASFAA's policy and federal relations team both in the NASFAA headquarters and on Capitol Hill. NASFAA has sponsored six interns through the DME since 2012. You can learn more about the experiences of our 2017 summer intern, Brianna Hayes, on page 54.

The DME has received gifts from many generous donors over the years. The adjoining pages list all 2016-17 donors, as well as the top two donation levels since inception. To see a full list of DME donors since the fund's inception or to make a donation, visit <https://www.nasfaa.org/give>.

## 50th Anniversary Scholarship

The NASFAA Past Presidents and National Chairs donated \$16,500 in 2016 to establish the 50th Anniversary Scholarship, which made six one-time, individual scholarships of \$2,750 using the following criteria:

- One scholarship per region would be given to a deserving student based on financial need.
- Preference would be given to someone currently working in the financial aid profession.
- Each region would select its recipient in a manner appropriate to its membership.

The regional associations selected the following recipients for this award:

**EASFAA: Eric DeRise**, financial aid program administrator, Culinary Institution of America.

**Program of study:** Bachelor's degree in accounting/finance, Northwestern University.

**MASFAA: Keri Gilbert**, financial aid advisor, University of Missouri-Columbia.

**Program of study:** Master's degree in public affairs, University of Missouri-Columbia.

**SASFAA: Jennifer Archer**, financial aid technician, Catawba Valley Community College.

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**SWASFAA: Elizabeth Amador**, financial aid manager, University of New Mexico.

**Program of study:** Master's degree in business administration, University of New Mexico.

**RMASFAA: Christina Pirtle**, administrative specialist – financial aid, Washburn University of Topeka.

**Program of study:** Bachelor's degree in communication, Washburn University.

**WASFAA: Chantel McMahon**, financial aid manager – operations, Western Washington University.

**Program of study:** Master's degree in adult education and higher education.

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# the 2017 dallas martin endowment policy intern

"I have learned about more than policy. I have grown as a young professional and an individual."

*Brianna Hayes, 2017 DME Policy Intern*



This summer, Brianna Hayes became NASFAA's sixth Dallas Martin Endowment (DME) summer policy intern. A political science and philosophy major at the University of Oregon (UO), she is a campus leader—serving as the associate leader in the Black Student Task Force and co-director of the Black Student Union—and a peer advisor in the UO Office of Student Financial Aid. Brianna plans to attend law school following her graduation in 2018, and hopes to continue advocating for student success.

Motivated by lessons learned from her outreach efforts on campus and in the community, Brianna embarked on her internship with "plans to build on my experience, knowledge, and skills." She closed her internship with the following blog post sharing memories of her summer with NASFAA.

## Hello to a New Adventure

Today, you are reading the last blog that I am writing as the Dallas Martin Endowment Policy Intern. Despite it being difficult to leave such an amazing association and Washington, D.C., I am filled with gratitude and much appreciation for all I have experienced in the last nine weeks. Ernie Harwell, a renowned American sportscaster, best summed up my feelings toward this experience when he said, "It's time to say goodbye, but I think goodbyes are sad, and I'd much rather say hello. Hello to a new adventure."

To begin, I am beyond thankful for the University of Oregon's Office of Financial Aid and Scholarships. The University of Oregon financial aid office staff does a tremendous job giving their student workers the opportunity to explore and improve their professional development. The entire office was completely supportive throughout the application process for the DME internship. When NASFAA posted this position, the office passed along information to all the peer advisors right away. Looking at the criteria, it seemed like the policy internship would be a perfect match for me. Moreover, the application process came across as a developmental opportunity that would prepare me for prospective jobs.





2017 DME Policy Intern Brianna Hayes (center) with the NASFAA staff at the 2017 National Conference.

At the time, I had little knowledge about NASFAA as an association and limited understanding about the culture of federal policy within financial aid. In less than a few minutes, I decided I wanted to give it a shot, but I knew I could not do it alone. Others in the office helped me along the way, and their efforts contributed immensely to my successful application.

Prior to this summer, I had never been away from home for longer than a few weeks. But my peers and supervisors in the aid office gave me a strengthened sense of confidence and increased my motivation to take a risk and try something completely new. Although I may not be an expert in policy, my role as a peer advisor provided a strong foundation of financial aid procedures at the institutional level. From that hands-on experience, stepping into a new space barely felt like an adjustment.

Being a peer advisor has taught me how important it is to help students, because everyone comes from different starting points. Every encounter of counseling is a learning moment, but it was clear that this internship would offer the possibility to improve how I advise students and their families. As a student worker, it is rare to experience firsthand the federal policies that occur behind the scenes in financial aid, but it was something I wanted to explore. Being here has opened my eyes to the major influence the federal government has on financial aid policy, and this experience has deepened my knowledge of issues in higher education accessibility.

Correspondingly, I became aware of the need for advocacy after attending several discussions, meetings, and events. I saw new perspectives that shifted my approach to different topics and broadened my idea of what defines advocacy. Even though my time here was short, the encounters and opportunities will last throughout my life. This is not something that everyone has the chance to do, and I am excited to return to Oregon and implement what I have learned thus far. During this academic year, I will work to finish my undergraduate studies and complete my first degree in the spring of 2018. I will also continue to serve within the student groups I participate with and work in the financial aid office.

Lastly, I want to thank all the kind professionals who have taken the time to meet with me and share their wisdom about navigating their careers in higher education, the NASFAA members who have been encouraging and have kept up with my blog, and the NASFAA staff. At NASFAA, I have learned about more than policy. I have grown as a young professional and an individual. Having the chance to witness a large association operate cohesively through communication and hard work inspires me to become a better leader. Thank you, all, for seeing potential in me, my goals, and interests. This time has been transformative and truly remarkable!

To read more about Brianna's experiences, visit her blog at [https://www.nasfaa.org/briannas\\_blog](https://www.nasfaa.org/briannas_blog). To help talented students participate in DME internships, visit <https://www.nasfaa.org/give>.

# nasfaa volunteers

more than 500 volunteers are a crucial ingredient in nasfaa's success

What is NASFAA's recipe for more than 50 years of success in advocacy, training, and serving as a financial aid community forum? Start with an important mission, toss in a talented and committed staff, and then add the key ingredient: knowledgeable, dedicated volunteers. The structure of NASFAA's volunteer support—task forces, committees, working groups, governing and editorial boards, evaluators, mentor groups, and more—changes annually according to the association's needs. But what remains constant is our volunteers' generosity in devoting their time and expertise to support NASFAA's mission and objectives and achieve our shared goals.

We are grateful to the more than 500 individuals who volunteered with NASFAA in 2016-17. To learn more about volunteering with NASFAA, check out [https://www.nasfaa.org/Get\\_Involved](https://www.nasfaa.org/Get_Involved).



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Johnson, Angela (Commission Director) - Cuyahoga Community College District

Dulude, Ryan - Community College of Vermont

Feldman, Rachelle - University of North Carolina at Chapel Hill

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Lyons, Cheryl - University of Central Arkansas

Penwell-Carson, Lindsay - Valley College

Stone, Amanda - University of Oregon

Weinert, Robert - University of California, Santa Cruz

Jordan, Micah - NASFAA Staff Liaison

Kelly, Dana - NASFAA Staff Liaison

Sharp, Amanda - NASFAA Staff Liaison

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Kienow, Sharon - Northern State University

Slaughter, Craig - Kenyon College

Johnson, Summer - NASFAA Staff Liaison

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## P&P Compliance Engine Implementation Task Force

Crossland, Shannon (Chair) - Texas Tech University  
 Boutell, Heather (Commission Director) - Bellarmine University  
 Chavez, April - Clovis Community College  
 Hines, Cindy - Western University of Health Sciences  
 Holt, Gloria - University of Maryland, Baltimore County  
 Johnson, Matthew - University of Nebraska at Kearney  
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Aguilar, Jenny - Newbury College  
 Arthur, Jeff - ECPI University  
 Austin, Tyra - The Catholic University of America  
 Baker, Crystal - Indiana State University  
 Brasure, Ralph - Charter Oak State College  
 Brown, Justin - University of Nebraska-Lincoln  
 Cline, Scott - California College of the Arts  
 Crossland, Shannon - Texas Tech University  
 Dulude, Ryan - Community College of Vermont  
 Faller, Marilyn - West Coast University & American Career College  
 Falleroni, John - Duquesne University of the Holy Spirit  
 Holubik, Donna - Eastern Michigan University  
 Hunter-Goldsworthy, Heidi - University of Mary Washington  
 Lafer, Mark - Pennsylvania Higher Education Assistance Agency (retired)  
 Levy, Douglas - Macomb Community College  
 Loewy Wellisch, Peggy - Los Angeles Harbor College  
 Marion, Latisha - Austin Community College  
 Miller, Vicki - The Ohio State University  
 Moser, Melissa - Pima County Community College District  
 Nucciarone, Mary - University of Notre Dame  
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 Zanders, Joan - Northern Virginia Community College Fairfax Campus  
 Payne, Stephen - NASFAA Staff Liaison

## Prior-Prior Year Implementation Task Force

Feldman, Rachelle (Chair) - University of North Carolina at Chapel Hill  
 Boutell, Heather (Board Representative) - Bellarmine University  
 Soltis, Kay (Commission Director) - Pacific Lutheran University  
 Amos, Maureen - Northeastern Illinois University  
 Boyd, Tarik - Norfolk State University  
 Jacobsen, Amanda - Salt Lake Community College  
 Lerma, Raul - El Paso Community College  
 Lindenmeyer, Mark - Loyola University Maryland  
 Miller, Michael - University of California, Santa Barbara  
 O'Leary, Eileen - Stonehill College (retired)  
 McClean Coval, Megan - NASFAA Staff Liaison

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Allen, Susan - University of New Hampshire  
 Bennett, Michael - St. Petersburg College  
 Biedscheid, Thomas - Colorado State University  
 Blackmon, Alvin - The University of North Carolina at Charlotte  
 Crupper, Vickie - University of Michigan  
 Day, Ron - Kennesaw State University  
 Dobson, Alyssa - Slippery Rock University of Pennsylvania  
 Frazier, Candance - West Virginia University  
 Goudeau, LaTasha - University of Houston-Downtown  
 Hall Lewis, Heather - University of Portland  
 Hanley, Karen - Georgetown University  
 Iven, Darcie - Clackamas Community College  
 Joerschke, Bonnie - University of Georgia  
 Levy, Douglas - Macomb Community College

McGowan, Kent - The University of Montana  
 McRae Goldberg, Maureen - Occidental College  
 Neel, Sandra - University of Louisville  
 O'Leary, Eileen - Stonehill College (retired)  
 Ortega, Wendy - California State University Office of the Chancellor  
 Oto, Rodney - Carleton College  
 Padilla, Sherrie - University of Hawaii at Hilo  
 Peterson, David - Indiana University - Purdue University Fort Wayne  
 Rollins, Elizabeth - York Technical College  
 Siliezar, Marco - Workday  
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### Re-examining Paradigms of Campus-Based Aid Task Force

Morrissey, Kelly (Chair) - Mount Wachusett Community College  
 Johnson, Angela (Commission Director) - Cuyahoga Community College District  
 Lerma, Raul (Commission Director) - El Paso Community College  
 Booker, Mary - University of San Francisco  
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### Task Force on Assessing Tuition & Debt-Free Higher Ed

Hopper, Lisa (Chair) - National Park College  
 Masterson, Lianne (Commission Director) - Blue Ridge Community College  
 Cable, Amy - Louisiana Community and Technical College System  
 Goeke, Victoria - College of Southern Nevada  
 Jones, Anthony - Appalachian State University  
 McAnuff, Brandon - University of Chicago  
 Morrissey, Kelly - Mount Wachusett Community College  
 Skaro, Scott - United Tribes Technical College  
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 Payne, Stephen Staff Liaison - NASFAA

### Thought Force on State-Region National Alignment

Young, Arthur (Chair) - Utah State University  
 Basford, Nathan - The Florida State University  
 Blazer, Lisa - University of Texas at San Antonio  
 Cline, Scott - California College of the Arts  
 Edwards, Jack - Stanford University Graduate School of Business  
 Erwin, Anthony - Northeastern University  
 Fowler, Pamela - University of Michigan  
 Hamilton, Billie Jo - University of South Florida  
 Hammontree, Andrew - Francis Tuttle Technology Center  
 Mann, Daniel - University of Illinois at Urbana-Champaign  
 Reisinger, Amanda - Zane State College  
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