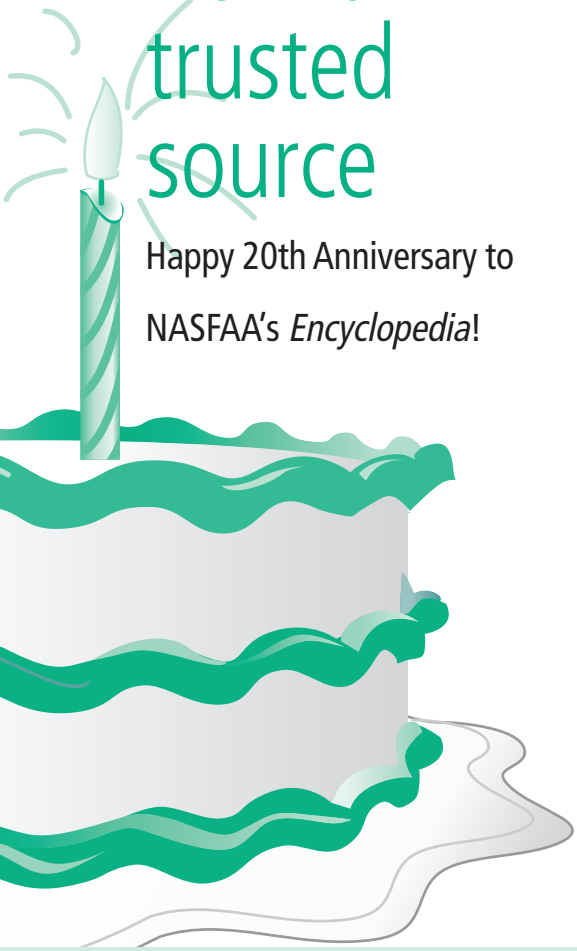


instant answers from a trusted source

Happy 20th Anniversary to NASFAA's *Encyclopedia*!



IMAGINE YOURSELF DRIVING DOWN old, familiar streets only to find that new buildings and roads have changed the routes and left you driving in circles. Administering student aid can sometimes feel the same way—the terrain shifts so quickly, it's easy to get lost in new regulations and changing guidance, or to accidentally follow old familiar requirements that now lead to a dead-end. Fortunately, NASFAA constantly updates financial aid's roadmap, the *Encyclopedia of Student Financial Aid*. After 20 years of guiding aid administrators through regulatory labyrinths and statutory U-turns, it remains the best tool for staying on course in our profession. And with its 2003 debut on the Web, it has grown even more powerful and convenient. In the rapidly changing field of financial aid, 20 years as a leader is no small feat. A closer look into the *Encyclopedia's* rise from a good idea to a crucial resource gives insight into its staying power.

No Small Task

The *Encyclopedia* began as a 1982-83 Training Committee proposal that reaffirmed NASFAA's priorities: training student aid administrators and developing reference materials for student aid professionals. The committee envisioned a one-stop source of information, combining guidance found in various Department of Education (ED) publica-

tions as well as statute.

Ruth Ketchum Burns and James W. Moore undertook the yeoman's task of compiling the more than 1,000 pages that comprised the first *Encyclopedia*. Moore, who had recently retired from his position as director of ED's student financial assistance programs, wrote the initial draft of the Guaranteed Student Loan section and reviewed the other sections. Burns, who had retired from the Oregon State Scholarship Commission, organized, developed, and wrote the General Eligibility, Pell Grant, NDSL, SEOG, and College Work-Study segments.

This would be a challenge in any era, but imagine trying to accomplish it before Internet searches, scanning, and e-mail were available, and you begin to get a sense of the project's magnitude. Along with the 1983-84 Training Committee and NASFAA's staff—who edited drafts and performed field tests—Burns and Moore gave life to the first edition of the *Encyclopedia*, released on October 31, 1984.

Shortly after its birth, the care and feeding of the *Encyclopedia* was placed in the capable hands of Barbara Gordon and Joan Berkes in NASFAA's professional development division. Berkes, now NASFAA's senior associate director of training and technical assistance, remains its guardian today. Although the content constantly changes, the underlying structure and organization of the *Encyclopedia*, as well as many source documents, dates back to the first edi-

how it all began

Transcript asked Ruth Ketchum Burns to describe her experiences as the first author of the *Encyclopedia*. We wanted to know how she became involved and what she felt were the biggest challenges in putting it together. We also asked what Burns has been up to lately, now that she is among the NASFAA retirees. Her forthright answers make it is easy to see why the *Encyclopedia* started, and has remained, so straightforward and full of integrity.

IT DOESN'T SEEM POSSIBLE THAT 20 YEARS HAVE PASSED SINCE NASFAA first published the *Encyclopedia*. At the time, its publication brought a great sense of accomplishment to me. As I recall, it sort of took over my life for months—in fact, we worked on it for almost two years. Knowing that 20 years later it remains an important resource for financial aid administrators is certainly

gratifying. Of course, the original edition (which I still have and look at occasionally) is very cumbersome—not to mention heavy to lift. The modern electronic version is a wonderful improvement in its compact form, particularly considering the ease and speed with which information can be found.

How did I become involved? My work at the Oregon State Scholarship Commission included answering a lot of questions about financial aid rules and regulations as well as conducting program reviews in Oregon colleges. One of the problems in coming up with accurate information was the vast array of resource material. In addition to the regulations published in the Federal Register, the Office of Student Financial Aid published handbooks, Dear Colleague Letters, audit guides, Q&A Letters, and other information. One purpose of the *Encyclopedia* was to gather and sort all this information in a form the financial aid administrator could use with confidence. I had developed a card file of information and references to help me in my own work, so San Jose State Director of Financial Aid Don Ryan, who was chair of the NASFAA Training Committee, visited me to discuss the possibilities of expanding the work I had already done into what eventually developed into the *Encyclopedia*.

tion. “I’m still in awe of Ruth Burns as I work on it, even now,” said Berkes. “You’re handed something excellent, and it endures.”

Since 1986, Berkes has monitored statutory and regulatory changes as well as subtle and overt shifts in ED guidance, meticulously incorporating them into the *Encyclopedia* as they arise. As overwhelming as that sounds, it is only the beginning. NASFAA’s vision for the *Encyclopedia* has always been far beyond a “simple” compilation of regulations and laws. Financial aid requirements form a complex web—a change in one area may cause a significant ripple effect in others. Various aspects of one student aid issue are often addressed in different sections of the regulations, and even in several publications.

For example, suppose you need to find the audit requirements for your institution. Without the *Encyclopedia* you would have to identify, locate, and integrate all relevant source material, ensuring that you know which requirements supersede which, which are outdated, etc. How difficult could that be? Well, consider that in just one section—Audits and Program Reviews—the *Encyclopedia* references included the following: extensive segments throughout 34 CFR 668 General Provisions as well as 600 Institutional Eligibility, the Higher Education Act of 1965 as amended, *The Blue Book*, the preambles to several *Federal Registers*, numer-

ous areas of the *Audit Guide*, sections of the Federal Student Aid Handbook, ED Q&A letters from the 1980s, various segments of OMB Circular A-133 and the A-133 Compliance Supplement, several Dear Colleague Letters, a 1997 SFAP BBS Policy Bulletin, and a 1994 ED Policy Statement. With the *Encyclopedia*, you simply go to the Audits and Program Reviews section to learn everything you need to know.



As its creators envisioned, the *Encyclopedia* synthesizes the information found in all relevant publications, boiling it down to a one-stop reference in plain English. This keeps users from overlooking important nuances of student aid requirements, and makes the *Encyclopedia* vastly different from any other resource, such as ED’s IFAP Web site, which mainly catalogs information. It also offers historical references for

certain requirements, which can be extremely helpful during a program review covering past requirements.

Paper and Progress

Combining all of the regulations, statutory requirements, guidance, and history of Title IV in one tome, the over 1,000-page early paper version of the *Encyclopedia* had multiple uses. It created a single reference that offered a historical perspective for audit purposes and helped users understand the “whys” beyond the “whats” of the regulations. Looming on the shelf with its 7” spine, it also impressed many “know-it-all” students who insisted they could easily learn what aid administrators know. And, after a long day at the office, you could forgo the gym knowing that you had already bench-pressed 11 pounds of *Encyclopedia* a few times that afternoon.

Physical fitness notwithstanding, the idea of an electronically searchable, downloadable compendium strongly appealed to most aid administrators. So in July 1996, Project Director Tim Christensen, now vice president of planning and development, led a select team of NASFAA staff members to produce the first electronic version of the *Encyclopedia*. Five 3.5” floppy disks held the publication, which you could install onto any PC. Once installed, a search feature empowered users, who could quickly scan the entire publication for keywords

The most frustrating part of the job was sorting through the mass of information—some outdated, some seeming to be contradictory, and some unclear. Two of the most time-consuming and tedious editorial tasks in developing the *Encyclopedia* were indexing and cross-indexing the information and verifying the accuracy of information and references. I had wonderful help from a committee of outstanding financial aid administrators and from members of the NASFAA staff. Their reviews and suggestions were invaluable. Jim Moore, then recently retired from the Department of Education, was largely responsible for the section on the Guaranteed Student Loan Program.

The *Encyclopedia* was completed just in time for the July 1984 NASFAA Conference. My daughter and I carried three copies of the original as hand luggage on the flight to Fort Lauderdale. The great need for such a resource document was evident in its warm reception by financial aid administrators at the Conference.



Ruth Ketchum Burns

All of us who had a part in it publication felt a strong sense of accomplishment.

What am I up to now? Nothing very exciting. Almost 11 years ago I moved to Corvallis, OR to be near my daughter and two granddaughters, ages 16 and 14. That means I spend a lot of time at soccer games and track meets! I stay involved in community activities and remain in touch with many friends from financial aid days. I still review scholarship applications for AAUW, P.E.O., and the State Scholarship Commission. I am fortunate to be in excellent health (I won’t count breaking my right arm just before the holidays!). I belong to a writing group and am writing my memoirs. It has been fun sharing memories of the years I spent in American Red Cross hospital service during World War II, and the freighter trip I took from Yokohama to Bombay and up the Persian Gulf with my granddaughters.

—Ruth Ketchum Burns

and find relevant material in just a few minutes. In 1996, we were all willing to wait a few minutes for information.

But we didn't have to wait long for a faster *Encyclopedia*. By 1997, NASFAA added a plus sign to *Encyclopedia* (*E+*). This added plus allowed users to link directly from each reference to the original source documents supporting it. *E+* was available on a single CD-ROM or 16 diskettes. Using *E+*, you could look up the plain English information in the *Encyclopedia* and then review the original language defining the requirement. In a matter of seconds, the demands of a student, parent, president, auditor, or program reviewer to "Show me where it says that in the regulations!" could be answered with "Certainly. It's right here." You could even print them a copy to keep. More importantly, it gave you a greater depth of insight into the requirements that affected your institution, students, and staff.

NASFAA Experts Become Techperts

It is hard to fathom the amount of time and expertise needed to create such an expansive tool. Imagine developing an electronic means of presenting the breadth of information contained in the *Encyclopedia*, manually linking every reference to the corresponding resource documents, ensuring that the reference links remain up-to-date as the rules change, and maintaining a means of searching both the compendium and the references in a meaningful way.

NASFAA dedicated Christensen, Connie McCormick (director of training and technical assistance), and a small team of NASFAA staff to getting the *Electronic Encyclopedia* off the ground. If Washington, D.C. experienced an energy shortage in 1997, it may have been due to the midnight (and weekend) oil burned in the NASFAA office that year.

Linking citations to their source references became one of the most time consuming technical challenges of producing the electronic version. Its original Lotus "SmarText" platform worked efficiently when only regulatory citations were linked. However, as NASFAA added an increasing number of electronic resource documents, the system grew unwieldy. Soon staff had to re-link every

citation in the *Encyclopedia* each time a change was made in the document.

Scanning presented another hurdle. Initially, source documents such as the *Student Aid Handbook* and Dear Colleague letters were only available in hard copy. This meant staff had to scan every document page by page. Unfortunately, because early scanners did not always convert the characters correctly, McCormick and her assistant, Lana Wood, had to read aloud to each other every word of every source cited in the text. That's between 50 and 60 documents. "*Student Aid Handbooks* aren't small," McCormick explained, "and when I say 50 or 60, I'm considering a *Handbook* to be one 'document.'"

When the *Encyclopedia* outgrew even the 16-diskette format, it moved from SmarText to Adobe Acrobat software—a platform better suited to its size—and became available exclusively via CD-ROM until its Web debut in November 2003. Switching to Acrobat had its challenges too. There was no formal training available on how to create a product like the *Encyclopedia*. "We learned a lot by trial and error," said McCormick.

Moving to the Web created additional challenges. The beauty of the electronic *Encyclopedia* is its ability to perform quick, efficient searches. However, available Web search engines are generally far more simplistic in their scope. Christensen created a team that included members of the Training and Technical Assistance, Communications, Marketing, and Computer Services staffs as well as a very capable Web development consultant. Together, they customized a basic Web search engine to perform comprehensive and targeted searches, designed the user interface, implemented security features, and revamped all the user documentation to produce the *Encyclopedia* for the Web. Searching is even more efficient than before: in the Web-based version, users can limit the scope of their search to specific documents, often finding the information they need in a few seconds.


Although producing the *Encyclopedia* is much easier now, it remains far from simple. Every change in relevant sections of the federal regulations still requires the NASFAA staff to recheck all of the links related to the

updated section. For example, every revision made by the December 2003 regulatory packages—some as minor as a change in a period, comma, or footer—must be checked and re-linked throughout. "That keeps life interesting," McCormick quipped. "In fact, can you guess what I'm working on right now?"

Financial Aid's "Global Positioning System"

New luxury cars all have global positioning systems (GPS) to help drivers find their way without a map. When NASFAA unveiled the on-line version of the *Encyclopedia* in 2003, it became the financial aid administrator's GPS. Subscribers can access the *Encyclopedia* from any Internet-linked computer, on campus or off, without installing a CD-ROM or lugging around that giant book. It provides instant answers from a trusted source. The on-line version (www.nasfaa.org/encyclopedia.asp) makes searches fast and targeted. You control the search by checking off exactly which resources you want to access. You can still link quickly from the *Encyclopedia's* insights to the supporting resource documentation and back again. And for one price, everyone at a subscribing institution who has a NASFAA Web ID can unleash the power of this versatile tool.

Two Decades and Counting

Who knows where we will be two decades from now? If technology continues to grow at its current rate, perhaps we will replace GPS with self-navigating cars that are faster, more fuel efficient, and better able to avoid obstacles and navigate curves. Likewise, the *Encyclopedia* will continue to get us where we are going even faster, avoiding potential obstacles and keeping aid administration on the right track. 

Linda Conard is senior associate director of communications for NASFAA. She can be reached at ConardL@nasfaa.org

If you're interested in learning more about the new Web-based *Encyclopedia*, you can take a test drive at www.nasfaa.org/Apps/EPlus/subscribeinfo.asp.