

Survey on Professional Judgment and COVID-19

June 2020

INTRODUCTION

On May 26, 2020 NASFAA distributed a survey to 2,613 Primary Contacts at our member institutions. The survey closed on Friday, June 5, 2020 at 5:00 p.m. ET. There were 293 surveys submitted, resulting in a 11% response rate. Below are the aggregate level results.

OVERALL RESPONSES

NASFAA is interested in learning about how the COVID-19 pandemic has impacted the number of professional judgment (PJ) requests your office will, or has already, received related to expected family contribution (EFC) and cost of attendance (COA), and what tools and resources would be helpful in managing such requests. Please answer the following questions based on received or anticipated PJ requests for any award year that falls within the date ranges provided.

The results from this survey will be used to inform NASFAA's understanding of PJ volume and federal policy discussions related to PJ. Responses will only be reported in the aggregate and individual institutions will not be named.

What is the total number of PJ requests your office has received since March 1, 2020?

Directions:

- If you do not track this data, leave this question blank. Do not enter "N/A" or "NA."
- Enter only whole numbers, do not use a comma (,) or decimal (.).

Minimum	Maximum	Mean	n
0	847	65	221

How does that number compare to the total number of PJ requests your office received between March 1, 2019 - May 26, 2019?

Greatly increased (increase of 50% or more)	21%
Somewhat increased (0 - 49% increase)	26%
About the same	32%
Somewhat decreased (0 - 49% decrease)	5%
Greatly decreased (decrease of 50% or more)	2%
We do not track this data	14%
n	287

Do you anticipate an increase to the total number of PJ requests your office will receive between May 26, 2020 - October 1, 2020 as compared to the same date range last year?

Anticipate PJ requests will greatly increase (increase of 50% or more)	42%
Anticipate PJ requests will increase somewhat (0 - 49% increase)	48%
Anticipate about the same number of PJ requests	6%
Anticipate PJ requests will decrease somewhat (0 - 49% decrease)	0%
Anticipate PJ requests will greatly decrease (decrease of 50% or more)	0%
We do not track this data	4%
n	293

What actions is your financial aid office or institution taking to manage this increase (if you are already experiencing an increase in PJ requests); or to prepare for this increase (if you are not already experiencing an increase in PJ requests, but anticipate that you might experience an increase in the future)?

	My office was doing this before COVID-19	My office began doing this after COVID-19 emerged	My office is considering doing this	My office does not do this and is not considering doing this	n
Reaching out to students proactively to inform them about the PJ process	21%	22%	28%	29%	278
Using a standardized form for students to submit PJ requests	84%	2%	9%	6%	288
Training financial aid staff on PJ	76%	4%	15%	5%	282
Providing students with time frames in which to expect their PJ requests to be completed	73%	4%	12%	12%	281
Updating consumer information (website, etc.) with information about your institution's PJ policies and procedures	47%	9%	27%	17%	276
Cross-linking PJ resources on financial aid webpage to other campus offices' webpages	15%	5%	23%	57%	276
Training non-financial aid staff to recognize when to refer students to financial aid office for a PJ request	53%	7%	20%	21%	278

What actions is your financial aid office or institution taking to manage this increase (if you are already experiencing an increase in PJ requests); or to prepare for this increase (if you are not already experiencing an increase in PJ requests, but anticipate that you might experience an increase in the future)?

	My office began doing this after COVID-19 emerged	My office is considering doing this	My office does not do this and is not considering doing this	n
Increasing frequency of meetings of your financial aid appeal committee	26%	27%	47%	272
Altering student documentation requirements	23%	32%	45%	275
Altering staff review policies and procedures	25%	37%	38%	271
Awarding emergency funding proactively as an attempt to reduce the number of PJ requests	35%	21%	44%	273
Offering refunds for expenses already paid to reduce the number of PJ requests	27%	10%	63%	271
Offering discounts on future tuition, room, board, or books to reduce the number of PJ requests	9%	12%	78%	268

What resources would be most helpful to you and your staff in preparing for an increase in PJ requests? (Check all that apply.)

On-demand training workshops/webinars	74%
Facilitated discussion with other financial aid administrators	53%
Downloadable/printable training materials	77%
List of best practices for PJ requests	85%
Sample PJ forms	69%
Legislative/regulatory relief	73%
n	284