

Webinar Transcript from NASFAA's Webinar: NASFAA 101: Supporting the Work You Do October 22, 2026



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NASFAA 101: Supporting the Work You Do

Good afternoon, everyone. Welcome to NASFAA's webinar, NASFAA 101, Supporting the Work You Do. Today we're going to explore resources that support your work, opportunities to grow professionally, and ways to connect with colleagues. We'll also share how NASFAA brings financial aid professionals' experiences into policy and public conversations. Before we get started, I will share a little housekeeping tips. Closed captions are available for today's webinar. To enable them, click on the CC button in the media player. If you experience any technical issues, such as losing audio or your slides are not advancing, we recommend refreshing your browser first.

It's the quickest fix for most common problems. But if you're still having trouble, feel free to reach out to me directly in the questions and answers box that's located just below the media player. That's also the box where you can submit any questions you have for today's presenters. We will spend a little time at the end to review questions that come in. The slides and additional resources are available to download in the webinar notes box and that's located just below the presentation slides. I'm going to tell you now, if you haven't already, go ahead and download that handout.

We do have a specific resource page after the slides that lists all the resources and websites that are referenced in this presentation. You can also chat with fellow attendees using the chat box throughout the presentation. But just a quick reminder, if you do have questions for the panel, be sure to use the questions box because that's where we're going to pull into during the Q&A. And a certificate of attendance will be available to download 30 minutes into the session. And at the end of the webinar, a feedback survey will automatically launch.

appreciate your input. So please take a few moments to let us know what you think. You can also access that survey at any time by clicking the engagement tools on the top of your webinar screen and clicking feedback survey. Lastly, the session is being recorded and will be available to watch on demand.

At this time, I'd like to introduce you to the presenters we have today. We have Sarah Austin, who is a policy analyst with our policy team. Myself, I'm Jackie Cottom, I am the director of online education. Margot Manning, who is the director of training operations and our new community engagement manager, Natalie Wong. And each will bring a different perspective on how NASFAA supports our members. And we're looking forward to sharing that with you. But before we get started, I do want to introduce our special guest. Melanie Storey, she is NASFAA's President and CEO, and just wanted to share some opening remarks with you all. Thanks, Jackie. And really what a dream team we have here today on NASFAA 101.

So good afternoon or morning, or let's just say good day to everyone who has joined. I'm so thrilled to see everyone joining to learn more about NASFAA. and how we can support you and how we continue to serve you through what have undoubtedly been some very trying times. So hopefully most folks know that NASFAA just celebrated its 60th anniversary, which really tracks to the establishment and growth of the Higher Education Act and the creation of the Title IV programs to support student access. And I don't think there's any question that those programs have grown and expanded in reach and complexity to administer.

So all the more reason that NASFAA is here to help you sort of sort through all of that growth and complexity. I should say the financial aid community is an extraordinary group of professionals committed to serving students, but also ensuring integrity in the financial aid programs that deliver opportunity and hundreds of millions of dollars to students every year. So thank you for all that you do there. And NASFAA is here to support you through advocacy, whether that's big A advocacy, federal policy, and sort of things with Congress and the administration, or small advocacy at the institutional level, which isn't small at all to you, but is, you know, kind of just to make it distinctive from kind of what we think of as big P policy, but to help you get support with your institution, making sure we provide staffing models.

We hear lots of things, ways that we can help you make sure that you have what you need on campus. And of course, professional development and training and connection to each other. And you're gonna hear a lot more about all of that from our presenters. I think you'll also hear a little bit that we've recently launched a new strategic long-range plan. Just to continue and grow each of those areas along with you as the profession grows and evolves, NASFAA wants to grow and evolve with you. The NASFAA team is here for you, but always wants to hear from you as well.

So as you hear about all of our products and services for the next hour, please continue to let us know if there are other ways that we can support your work as we continue our plans for the future. So again, so thank you for being a member of NASFAA. Thank you for joining this webinar. I hope you learned something. I hope you are able to give us feedback, but now I'm going to turn it over to Margel Manning, who will kick us off? Thank you so much, Melanie. And I echo everything that you said and our appreciation for the members.

It is an honor to serve the financial aid profession. We have a very ambitious agenda today and we'll be covering a lot of NASFAA's products and services we'll begin with a quick overview of NASFAA and then jump into those services we will show you where to stay informed find answers and then explore areas to build your skills and connect with colleagues finally we will look at how members perspectives directly impact our work including conversations with policy makers in Washington and we will provide some ways of for you to get involved with us beyond just the training, because we love to work with our members. So about NASFAA. As a quick refresher, our mission guides our work.

Our mission is grounded in three key areas, training and professional development for financial aid professionals, public policy and advocacy for student access and success, and communication and collaboration on student financial aid issues. That's the foundation of who we are and why we exist, and we aim to serve you so you can continue to support students and their families. Our member institutions actually serve nine out of every undergraduate in the United States. And that is a very powerful testament to the impact that this community has on students and families. So again, it is an honor to serve you all and the work you get to do every day.

NASFAA recently released our new strategic long-range plan for the next five years. And that guides where we focus our work and our resources. It focuses on supporting members, investing in professional growth, strengthening community, and increasing the profession's visibility and voice. It also emphasizes innovation, partnerships, and research. You'll see those priorities reflected throughout today's presentation. And if you're curious, read the full plan for the next five years, it is available online. Your member experience and professional impact is at the heart of all of it, everything that we do.

So we encourage you to take a look if you're interested. So bear with me as I set a bit of context for the presentation today about NASFAA's benefits and how they connect to our different membership levels. As we talk about our many services and resources, it's helpful for you to understand what your institution's membership package already covers and where there's opportunities, it could cover more. I do want to be clear, this is not a sales pitch. My goal here is simply to raise awareness to help you understand what's available to you through your membership. so that you all can make the most of those benefits.

Standard membership is designed to meet the core needs of most of our member institutions. It provides access to today's news, ask regs, the compliance engine self-evaluation checklists, and NASFAA member content through our web pages. Value and Value Plus memberships include additional benefits, including access to some self-study guides, conference registration discounts, and you can see the benefits on the screen. Not going to read them all. You can check your membership status in your My NASFAA profile. So go to My NASFAA and then click contact information and then scroll down to the bottom red circle.

It says membership status. It'll have what your membership status is. So it'll say standard plus or value And that is going to inform what your benefits include. So we want to hear a little bit from you. We know that this year has been very stressful for all of the professionals in financial aid. So professionally, where have you been focusing your time? I have a feeling I know where that is, but keeping up with changes, finding answers and resources, building your skills, connecting with colleagues, understanding policy developments. And you can choose all that apply. So we'll give you a few moments to get those responses in.

We know how dynamic your work is. All right, just another moment or two. Okay. Yep, pretty much what I expected. Keeping up with changes is the top. And we know that this year has been riddled with them. And we hope that we are able to support you because we know things have been changing so much through our different resources. So we'll touch on how to utilize those to help you through all of these areas. Keeping up with developments while managing a full workload can be challenging, especially in today's news cycle.

So our communications team really focuses on trying to give you the information as fast as we can in a concise manner. We offer several ways to cover what is happening. Today's news is delivered daily to your inbox and provides updates across financial aid and higher education. You can also listen to our weekly podcast, Off the Cuff, And you can also follow NASFAA on social media. We really cross post information in all of these areas. So choose the combination that works best for you and your time. You don't need to follow every channel to stay connected, but we encourage you to.

Within My NASFAA, you can manage your preferences. So specifically here, we're showing how you can manage your e-mail preferences and directory settings. If you are receiving updates that don't fit your interest or missing something that you think would be useful, this is a good place to check. It's always good to just make sure you haven't accidentally opted out of something or opted into something. So you can do that through your My NASFAA in the e-mail options and directories and settings section. Another resource that I just learned about, you can customize your suggested content. So you can even go deeper.

You can select topics and explore the content suggested for you. For example, if you're a particular aid program or policy issue that is a regular part of your responsibilities, you can select those topics such as administrative capability, Canvas-based aid. The list is very long. It's cut on the slide. And then you can also opt in to receive a weekly e-mail digest of those news and updated items matching your selected topic. So I thought this was a really useful tool that might be underutilized.

So go to your suggested nespa.org/suggested-content, and you can go ahead and personalize that. And finally, one other information resource I want to highlight is NASFAA's web centers. A web center consolidates content and resources into one place. And the One Big Beautiful Bill Act is a great example of that. It brings together the coverage, AskRegs articles, resources that can help your office understand and prepare for that change. Hopefully we won't have many more web centers in the near future, no big late breaking updates, but it is a way for us to consolidate all of the information in one place to make it manageable for you to go and check to see if anything late breaking has happened.

Staying informed, especially recently, often leads to more specific questions like, how does this apply to the student or the situation in front of me? So I'm going to turn things over to Jackie to show you how and where to research a question and find references and tools that support your work. Thank you, Marco. Okay, so We know as financial aid administrators that two days are not quite the same. You might be working through a complicated student eligibility question, trying to interpret a regulation or just looking for guidance on how to handle a particular situation.

So that's where we come in. NASFAA compliance tools. We understand that the challenge isn't necessarily knowing what question to ask. also knowing where to find a reliable answer. So NASFAA's compliance resources do include several tools designed to help you research questions, understand requirements, and support your work. I'm going to spend a little time taking a closer look at a few of them, but wanted to just make you aware of them. They all support your work, but each does serve a slightly different purpose. I like to think of it in terms of what you're trying to accomplish.

So Let's say you have a regulatory question and you're not quite sure how to handle a particular situation. That's where Ask Regs comes in. You can search for answers to questions that other financial aid professionals have asked, or you could submit your own question to us directly and NASFAA's training and regulatory assistance team. It's the team I'm on. We will research that question and get back to you on it. Or let's say you're not quite sure what you're looking for, but you need to, or you know what you're looking for, but you need to find the actual regulatory language or federal guidance, that's where the student aid ref desk comes in.

It brings together those important reference materials to help you get back to that original source. If your focus is compliance, you may be taking a broader look at your office's compliance practices, or maybe you're preparing for

a particular process or an audit or program review, that's where the compliance, the self-evaluation checklist can help you because it will help you assess your practices against federal requirements and identify areas that may need attention. And then finally, if you're looking to develop or update your institution's written policies and procedures, that's where our PMP builder comes in. It provides more of a structured framework to help you connect your to help you connect and document your institution's processes.

So they really complement one another. So whether you're researching a question, locating guidance, evaluating compliance, or documenting your procedures, we have resources to help you do all of those. One of the resources that I know if you haven't used it yet, once you start using it, you'll probably find yourself coming back to it over and over and over again, and that is our Ask Regs. It is a searchable knowledge base containing answers to a lot of the regulatory questions submitted by you all, the financial aid professionals. And so what's particularly valuable about AskRegs is that the answers are researched and developed by NASFAA's training and regulatory assistance team, like I mentioned.

Our team does regularly review. We add new answers as regulations and guidance change, which is especially important in an environment where we're constantly navigating those new requirements. So you can search for questions that other members have already asked. You can browse by a topic or submit your own questions. So I'm going to show you just really quickly what it looks like if you're not familiar with it. When you go to the AskRegs website, this is what you'll see. One of the first things I want to point out is that you don't have to necessarily come to AskRegs with a question in mind.

You can just use it to explore what's happening and see what other financial aid professionals are asking about. Sometimes we do have a timely alert. So at the top of the page, you can see an alert highlighting you if there's a particularly timely issue. Or it could be something like system maintenance. These aren't always populated, but when there's something important that we want to make members aware of right away, you'll see it there. And that's where that red box is right now. The timely box features questions and answers that our team has specifically selected because they're especially relevant right now. The most recent box will show you newly published answers as well as existing answers that have recently been updated.

We do have a trending box and you may not be surprised to see that it has something to do with the schedule of reductions. So the trending box will show you questions and answers that members are viewing frequently. It's particularly helpful because it gives you a sense of what issues your colleagues are researching around the country. And like I said, right now, it has to do with SOR. And then the most helpful, these are ones that members have highlighted and have indicated are particularly useful. So even if you don't have a question today, browsing those sections is a good way to stay informed.

And now let's say you do have a specific question you're trying to research. You can use the search box to look for answers related to your situation. One tip I always like to share is to keep your searches simple. It's not a Google search, so you don't have to put a whole sentence. So rather than typing out an entire question, just use a few keywords that describe the issue. So like those keywords, those main concepts with your question, put those in because that's what's going to help you filter out the articles.

So you can see that's where you would put in the search. So did this for example. If you're researching something, return of Title IV, R2T4, and schedule of reduction, SOAR, you might start with a search like R2T4 and SOR. We have most of the common acronyms, so you don't have to type out the whole word, just R2T4 and SOR. And so from there, you'll see the question, the articles that relate to that question. And you'll notice that you can narrow your results using a filter.

You can do it by award year or category. award year category. And the award year filter is particularly important because we know that regulatory requirements and guidance can change from one year to the next. So when you're reviewing an answer, just make sure you're looking at the information that's applicable to the situation in the award year that you're researching. And then let's say you've come onto the page, you're looking for a question and an answer and you don't see it. So if there's something that you've researched and you still can't find an answer to address that particular situation, that's when you can use the AskRegs feature.

ask a question feature and that will allow you to submit your question directly to our team. So you begin entering your question and when you do begin entering your question, the system may start suggesting answers that are

related to your topic, just in case you might have missed it. So I encourage you to review those because you may find that your question has already been addressed. But if it doesn't quite fit your circumstances, you can continue with submitting your question. And then our team will research the issue and provide a response. So you would just click ask a question and submit your question and we will get back to you with a response.

The other really useful resource that we have is the compiled regs. Now, A lot of folks will use the student ref desk. I mentioned that before to help find where exactly in the regulations this exists. Sometimes you may need to look directly at the regulatory language to see how it's changing, and that's how many members will use the ref desk and the compiled regs. So it just brings together all the regulations, all the major sections, and the formatting helps distinguish current language from upcoming changes. So you can see what's changing, what's current right now.

We've talked about AskRegs and how it can help you research and interpret regulations, but sometimes you have to go to the regulatory language itself. So the Compiled Regs brings together most of the federal student aid regulations in one place. And you can access it here. I'm going to show you, oh, yep. So that is it for the compiled title for Regs and I am going to at this time pass it over to Margot. Thank you, Jackie. Ask Regs is such a lifeline of our association and the I think the most utilized benefit.

So it is very important that Jackie covered all of that information. So thank you. Those resources answer the questions that arise in your work. But now let's look at opportunities to build your knowledge and plan your professional growth, you know, when you have time in your day. When thinking about professional development, the financial aid competency model is a great place to start. It can help you reflect on your strengths and identify an area that you would like to develop. The competencies connect knowledge and task statements with suggested resources and training.

So if you dig into each competency, there are seven of them. It'll kind of go through what is expected, and it is constantly evolving and changing based on where you are and you your profession. Our team plans to continue to build upon this competency model, and we're really excited to make it even more useful in the upcoming years. It's a big part of our strategic long-range plan. NASFAA offers professional development for people at different experience levels and with different learning goals throughout multiple modalities. We meet you where you are and what you're most comfortable with.

Jackie is going to walk through some of those specific opportunities now. Jackie. Okay, thanks Margot. Webinars. Okay, so I know that if you are here right now, you are familiar with webinars. It's a way that we provide focused learning through live presentations and recordings that you can view on demand. Our live sessions give the opportunity to submit questions. I've already seen some questions coming in. And the recordings offer flexibility because we know it doesn't always work for you the time you have someone in your office or you may have a meeting yourself.

So you can always come back. The webinar package does include the fee-based webinars offered during the membership year. So check your institution's package to see what access is already available. Margot had mentioned that at the very beginning of this presentation. And just a thing about webinars: live webinars offer a wide range of topics relevant to financial aid professionals throughout the year. we are always looking at adding webinars and seeing what is relevant for you all at the time. So our membership year runs July 1st through June 30th.

So just check out our webinars listings. The other great option are our NASFAA self-study guides. And these are great options for anyone who prefers more of an independent learning experience because each guide focuses on a specific financial aid topic and it includes multiple lessons and exercises to help reinforce what you've learned. So one of the biggest advantages of this one is flexibility because you can work through the material at your own pace, whether that's setting aside dedicated study time or working through a lesson when your schedule allows. Our self-study guides can be very helpful too if you're new to a particular area of financial aid because they're by topic.

There's 16 different topics. If you need a refresher or if you're preparing to pursue a professional credential. So as you can see on the slide, access does vary depending on your institution's membership package. If your institution has a value plus membership, then everyone on the institution roster has unlimited access to all the self-study guides. With the value membership, roster members have access to six specific guides, and it includes topics like

student eligibility, cost of attendance, and verification. And then the standard membership guides can be purchased at a discounted member rate, and it's shown there.

But once you have that roster members are also able to have access to that SSG, self-study guide. That's what we call our self-study guides. So if self-study guide sounds like something that would be useful to you, we encourage you to check your institution's membership package before purchasing anything because you may already have access to it. So this screen just shows how you confirm if you already have that access. So when you go to My NASFAA and click on File Access Center, you'll see if you already have access to some of those self-study guides.

And then finally, I want to highlight our NASFAA U courses. These offer a different learning experience from our self-study guides because they're facilitated courses and they provide opportunities to engage with instructors and other financial aid professionals. We currently have two classes that just kicked off this week, higher education loans and return of Title IV funds. So it's an in-depth course. If you're someone who benefits from having a structured schedule, we have opportunities for discussions, live get-togethers and activities to help you apply what you're learning. courses is a great fit.

One of the most valuable aspects of the courses is that you're learning alongside colleagues who are also working through some of the same questions and challenges you encounter at your own institution. So it really gives you the opportunity to exchange ideas and perspectives to try to enhance your learning experience. And our online courses also include activities designed to help you apply concepts. So it's not just reading or listening to the information; you're actually working through case studies. And depending on the course, there may be opportunities to work toward a professional credential or certificate.

So whether you prefer independent study through our self-study guide or a more structured instructor-facilitated experience through NASFAA U, there's lots of opportunities to help support your professional development. And with that, I'll turn it back over to Margot, who's going to introduce another resource available to support financial aid offices and professionals. Yeah, thank you, Jackie. Next up, I do want to talk about Blue Icon Advisors, which is NASFAA's consulting arm. They provide a variety of opportunities to strengthen your office and support your professional growth as well. Blue Icon's mission builds upon NASFAA's mission, which is to serve a trusted advisor to the financial aid community by supporting and improving financial aid compliance, operations, and student service.

One of the most popular offerings from Blue Icon is the Let's Talk series. These are free, member-exclusive conversations that bring financial aid professionals together to share challenges, exchange ideas, and learn from one another in Zoom. So go ahead and look at those upcoming offerings if you weren't aware of them. A Blue Icon also offers group coaching, which provides A structured collaborative setting where small groups can dive deeper into topics like leadership, management, or operational effectiveness, all guided through Blue Icon's coaches. And if you're looking for a more personalized support, executive coaching offers one-on-one guidance to help leaders build strategic skills, tackle challenges, and grow professionally.

So we have lots of offerings through Blue Icon, again, customizable based on what you need. So you can learn more online at nesba.org/blueicon. NASFAA's professional credentials are a great way for financial aid professionals to show their expertise and commitment to the field. So it's kind of the next step after all of these training opportunities. Each credential focuses on a specific topic like verification, student eligibility, return to Title IV funds. You can see the whole list on the side of the screen. They are a meaningful way to showcase your knowledge and build credibility with your colleagues and students.

There are four ways to qualify to sit for a credential test, and Jackie covered most of them. You can pass a NASFAA U online course. You can attend an authorized training event, often hosted by state, regional, or national conference. You can prepare independently using a self-study guide or if you have five or more years of experience, you can just send in your resume and be approved by our credentialing team. For many, those credentials are the first step towards earning NASFAA's Certified Financial Aid Administrator designation. So we have credentials here and then we also have certification.

The CFAA program recognizes professionals who have demonstrated broad, comprehensive knowledge of financial aid administration and a strong commitment to ethical practice. Candidates meet eligibility requirements,

then they pass a knowledge exam and then are expected to maintain their certification through continuing education to stay current as the field evolves. As you all know, it is constantly changing. Earning the FAAC designation sets you apart as a leader in financial aid and signals your dedication to excellence in serving students and institutions. You can learn more about both programs online. Again, credentials are more of a deep dive into topics and certification is broader knowledge of financial aid in general.

So both are great opportunities, again, to add to your resume, to show your commitment to the profession and set you apart in the field. The certification team, I did want to flag this, is offering one-on-one strategy sessions, I believe in November. More announcements and, more information will be coming soon about those. And those are, again, you sign up one-on-one with a member of our certification team to kind of talk through the opportunity, see if it's a good fit for you, kind of come up with a strategy to prepare. So those are very beneficial. So be on the lookout for that. I'm sure it'll be advertised in today's news.

NASFAA recently released digital badges to give you a way to share professional achievements online. So if you've earned any credentials or certifications, you have a digital badge. They can help colleagues and other professionals understand an accomplishment and the work behind it. So it includes all of the earning criteria and what you had to do to earn that badge. Let me show you. So to get to your badges, to see if you have earned any through NASFAA, you just go to your My NASFAA and then there's a badges and certifications tab on the side of your screen and then click View My Badges and Certifications.

And that is where you would find those badges. So go ahead, share those on LinkedIn, on your social media areas. You can add it to your signature. Information is in those badges. So learn more about how to share by visiting that Okay. Learning also happens through conversations with people who understand your work. And strengthening community and belonging is a top priority in NASFAA's strategic plan. So I'm going to turn things over to Natalie to walk you through our communities.

Thank you, Margot. So let me begin with NASFAA communities is our online community powered by Slack. We have over 11,000 financial aid colleagues in that community across the country. As the community engagement manager, I help members find connections and participate in the community. And the real value of communities is the opportunity they provide for you to connect with your peers. You can begin exploring a channel that's relevant to your work, following a discussion, or introducing yourself. So now let me show you how that looks. If you're not familiar with Slack, think of it as an instant messaging platform for our community.

Instead of sending an e-mail to a listserv and waiting for a response, you can post a question or start a conversation in a channel and other members can see it and respond in real time. If you haven't yet joined our communities, to the left you can see a form that you can complete on NASFAA.org, and that is how you can enter the Slack community space. And then to the right is how Slack itself looks. So as you can see, you can post messaging there. You can be a part of many channels. So it's a very user-friendly platform, and we also have guides on our NASFAA.org website to also teach you more about Slack.

So I hope you use communities as a resource when you find yourself thinking. I wonder how other financial aid offices are handling this because instead of figuring it out alone, you have access to financial aid colleagues from across the country who may have encountered the same thing you are. From there, like I said, you can connect with colleagues all over the country. The next topic I would like to bring up is another great way to take advantage of your membership is connecting with your colleagues in person through NASFAA's conferences and events. I'd like to start with the Leadership and Legislative Conference and Expo that takes place in Washington, DC, and provides an opportunity to focus on leadership development and advocacy.

The Leadership and Legislative Conference is organized into different learning pathways, allowing you to choose an experience that best aligns with your roles, interests, and professional goals, and learn along with colleagues on a similar path. We also have the NASFAA National Conference, which is our largest annual gathering of financial aid professionals. This conference brings together colleagues from across the country for educational sessions, regulatory and policy updates, networking, exhibitors and opportunities to learn from one another. And while the educational sessions are obviously an important part of attending our conferences, I always like to emphasize that some of the most valuable learning happens through the connections we make while attending those conferences.

If you've never attended a NASFAA conference before, don't feel like you need to already know people before you go. These events are designed to give you an opportunity to meet colleagues, exchange ideas, ask questions, and become more connected to our profession. So whether you're looking to strengthen your technical knowledge, grow as a leader, better understand what's happening at the federal level, or simply expand your professional network, NASFAA conferences are a great opportunity to learn, connect, and become more involved in the financial aid community, and registration for our 2027 leadership legislation and expo conference is now open. But if travel isn't an option for you, the NASFAA Virtual Summit is a great way for financial aid professionals to conveniently connect fully online and access timely policy updates, practical insights, and important resources from NASFAA experts and members.

Recordings from our 2026 Virtual Summit still remain available through January. And more information on the 2027 virtual summit will be available soon. Another great resource that I highly recommend you bookmark is our NASFAA's training and events calendar. This is a great place to see what's coming up across the profession all in one place, from NASFAA webinars, online courses, national, regional, and state association conference and events. The calendar is fully interactive, so any icon you click on will provide you more information on that event. You can also see if the trainings are eligible for certification, sorry, for Financial aid, if you have your FAAC, you can see which ones are available for recertification points and also which opportunities are available for credentialing.

You may also see NASFAA communities on the road throughout the year. For several years, communities has had a presence at the regional conferences, partnering with our regional association to create additional opportunities for financial aid professionals to connect in person. At each conference, we look for ways to bring the community together through informal gatherings and networking opportunities. Those activities may look a little different from conference to conference, but the goal is always the same, to help colleagues meet one another, build relationships, and strengthen your sense of connection within the financial aid profession. We spend a lot of time connecting virtually through NASFAA communities, so these conference gives us a wonderful opportunity to bring the same spirit of the community into an in-person setting.

So as you explore the training and events calendars, think about which opportunities might be right for you. I encourage you to think beyond just educational sessions. These events are also an opportunity to meet your peers, expand your network, and build relationships that can continue long after a conference ends. And if you see NASFAA communities at an upcoming regional conference, please come say hello and join us. As Melanie said, we love to hear from you and this is the perfect opportunity to do so. With that being said, I am now going to hand it back to my colleague, Sarah Austin. Thanks so much, Natalie.

So we really have already explored what you can use directly, but another part of NASFAA's work involves bringing financial aid professionals' perspectives into conversations beyond the campus. So our strategic plan emphasizes the profession's visibility and voice. And so now I'm gonna kind of talk about how we make sure to share your campus experiences and how that informs NASFAA's policy work and helps us explain financial aid issues to broader audiences. So I'd like to give you a little bit of a glimpse into how your, our members' perspectives impact our work on the policy team, which is my team here at NASFAA. And so also how we can help support you to make sure that your voice is heard too.

So as you all know, financial aid professionals are the ones who really see how financial aid policy affects the students and families, including challenges that maybe arise and they may be less visible to people who are outside of the financial aid profession. Now, those perspectives help NASFAA explain how policy works in practice when we're having conversations with lawmakers or people at the Department of Education, other associations or maybe just the general higher education policy community. They also help us provide contacts to reporters. We get a lot of reporter calls, especially lately, as I'm sure you've all seen out in the media. We're quoted quite a bit.

So we get a lot of reporter calls and we really want to be able to explain what developments actually mean for students and institutions. We know that financial aid can be really weedy; it can be really technical, and so those outside of the financial aid office may not realize what something really means. And so we are tasked with explaining the kind of why does this matter or the what does this mean. I always joke that Karen McCarthy, who's our VP on the policy team, she always says, okay, but why do we care? Or why does this matter? And that really is what we're tasked with is providing that context to reporters or those outside of the profession.

Now, your questions, your feedback, all of that really helps ground the work that we are doing in the policy world, but to know what's happening on your campuses. Now how we learn about campus experiences kind of happens in several different ways. Some are much more formal and proactive, and then others are very informal and reactive. And so I want to share a few examples today, but know that there are many more than this. I really had a hard time choosing what examples to even share with you because there's so many. But the first one I want to share is an example of a formal project that solicited member feedback proactively.

So last year we had a research project on how schools construct their cost of attendance. And one major part of this project was making sure that the perspectives of financial aid administrators was known. That was really kind of the base of this project. So we conducted a member survey, we did some focus groups with financial aid administrators, and then we did some one-on-one interviews with financial aid professionals who were heavily involved in the COA construction at their school or maybe at the state or regional association level. And what we wanted to know is kind of proactively what challenges you're facing, what best practices you've already kind of come up with, ideas that you maybe have for improvement in COA construction and more.

We wanted to kind of know everything so that we could make sure that those voices could be providing the insights for policymakers in future conversations. And so that project was really a good example of how we needed our members in order to kind of inform this research. We also have much more informal ways that we hear from all of you. So for example, policy staff, we are on the graduate and professional listserv. We are in NASFAA communities on Slack, like Natalie was just talking about.

We really try to have a pulse on what you all are talking about, what's coming up in your day-to-day. So we see when all of a sudden our members are talking about an issue or maybe a concern in your day-to-day work, and maybe it's that you're all of a sudden seeing a bunch of reprocessed ISIRs and you don't know why. And so you kind of start chattering about it on Slack. And so we see that and we dig around a little bit more trying to figure out, wait, why are you seeing all these reprocessed ISIRs? Maybe we'll talk to our trading and regulatory assistance team because they have that AskRegs like Jackie was going through.

And we'll ask, are you also seeing questions about this particular reprocessing of ISIRs? Are you getting questions on AskRegs about it? And so we'll talk with them. And then kind of where that goes, we may determine that we want to reach out to the Department of Education and try to get more information, see what you all are experiencing. Sometimes it's that we need a question answered from them, or sometimes it's really just that we want to share. Here's what our members are seeing. Here's what they're experiencing. And so we have that contact with them.

And again, we're really trying to focus on what does this mean? Why does this matter? And so if maybe the department does do a reprocessing of ISIRs, that may not seem like a big deal, but we want them to know, well, now that school's got these, here's what they're experiencing, here's where the challenge is. And so this is really a great example of, again, an informal way we hear from you, but where community discussions, the training and regulatory assistance team and the policy team all work together to make sure that your voices are heard and then shared with the appropriate people.

Now you can all follow the work that we do on the policy team. You can follow this through policy updates. I would encourage you to watch Today's News, our daily newsletter, and also listen to Off the Cuff, our podcast, because that's where we will regularly share updates. Also, if we've created any new resources or documents, that's where we would mention that. We also have a legislative tracker, which is a comprehensive look at any legislation that's been introduced by Congress that impacts student aid. We also recently created a similar tracker, but for litigation. So we've had a lot of litigation recently about financial aid.

So that also tracks kind of the latest developments there. We publish an annual national student aid profile that has tons of data that could be helpful to you. We have benchmarking surveys. We have reports from our research reports like that one I shared on COA and much more. Some of these resources are things that we create to kind of help you understand the developments. Others are ways that you can contribute your perspectives, maybe participate in advocacy. So please check out our website for more on that. Before I pass it to Margot, I realized I did forget one thing here.

I want to go back to this slide because I wanted to mention a couple other ways you can get involved that I think I missed here. Yes, I did. Okay, at the bottom of this slide. So I just wanted to mention other ways that you could get involved to share your perspective. So there's a couple of things I wanted to highlight. One being our advocacy pipeline. So you could choose to participate in NASFAA's advocacy pipeline. It's an ongoing effort that's designed to connect either virtually or in person, NASFAA members with congressional offices in Washington DC.

And it's so that you can share your on the ground perspectives with policymakers. So it's a really direct way to make your voice heard, meeting with your actual senators and representatives to hear your perspective, share what your concerns are. And NASFAA is there to help support you in that. So it's a whole really structured way that you can get involved at the congressional level. You could also choose to participate in the Rapid Response Network. This is, so NASFAA is often asked for feedback from maybe it's the Department of Education, maybe it's a congressional office, but they ask for feedback and it's something that they need kind of a quick turnaround on.

And so we will then go out to our Rapid Response Network, which is this group of members who have agreed provide timely feedback or information to NASFAA and so we'll go out with whatever the request is for information or what feedback we need and then this task force of members will respond fairly quickly and then we can kind of gather that information review it and then share with whoever had requested um information from us and my example on this one that I always like to tell is kind of embarrassing for me, but good for all of you, is that we once had a congressional office reach out asking about an idea they had.

Honestly, the idea is irrelevant. I don't even remember what it was, but they had an idea. They thought it was a great idea, but they wanted to know if financial aid administrators would be on board. I was like, oh yeah, this sounds like a good idea, but we decided to ask Rapid Response Network. And as the responses trickled in, it was like, no, this would be a horrible idea because of X, Y, and Z. Please don't do this. You don't want anything like this. And I was immediately like, that is my one step away from the financial aid office.

I used to work in an aid office. I don't anymore. So just being able to remember that I don't always know what you all are actually dealing with in your day-to-day and remember that you are the experts here and we should check with you. we were able to gather that information, share it with the congressional office, even though it was the complete opposite of what I had assumed the answers would be. But a very good example of how your voice is what was actually elevated and shared with the congressional office. Sorry to backtrack on you, but I just wanted to make sure I hit those two points.

So now I will pass it over to Margot. I love that example. Thank you so much, Sarah. Just an aside, my favorite part of the day is when I get to have meetings with our task forces. I work with a lot of volunteers and a lot of NASFAA members. And just hearing about your day and what is going on, what's percolating, it makes, again, my job feel meaningful and impactful. So we encourage you to get involved. As we've emphasized throughout the presentation, NASFAA's greatest strength is our community.

It is our members. who generously share time, experience and ideas with us. When members volunteer, you're not just contributing to NASFAA's work, you're helping shape the direction of the profession itself. And these opportunities create space to connect with peers, exchange insights and develop leadership skills that last well beyond a project itself. So ways to get involved. You can serve on task forces. You can mentor a colleague. You can share your expertise through a conference session. Call for proposals is still open if you would like to submit a session proposal for NASFAA 2027.

And getting involved again helps you grow both personally and professionally. Volunteering with NASFAA builds relationships, strengthens our collective voice, and ensures that our programs truly reflect the needs of the financial aid community. Together, we create the network, the knowledge, and the advocacy that keep our profession moving forward. So we encourage you to get involved when you can. We understand that your time is very valuable, and volunteering is probably pretty low on your totem pole. So when you do volunteer, we truly appreciate it and very much value your time and try to make it as efficient as possible.

I mentioned volunteering as a way to get involved with the organization. And I want to take a moment to just highlight several toolkits that have been put together with the help of our task forces and working groups. These toolkits are available to all NASFAA members and have truly an incredible amount of tangible, beneficial information within them. A couple selfishly I want to promote because I helped work with our volunteers on these,

the advancing the profession toolkit and the career awareness toolkit are both really strong, especially as we're thinking about the future, getting more folks into the pipeline and seeing financial aid as a profession and a career.

Those are really great resources to look at and review as you're thinking about kind of succession planning and the path forward. All right, another poll. Make sure you all are still paying attention. Oh, actually, one more slide. Thank you. Just again, thank you for the work you do for students and families and being part of this community. We hope today you've learned ways to find the support that is useful to you, whether that's an answer, a development opportunity, or a colleague to connect with.

We hope that NASFAA, you see us as a home base and a place that will support you and nurture you and your profession growth. Now is the poll. So we have covered a lot today. But before we turn to questions, we want to know what is one step you would like to take after today? Is there something you learned about that you aren't currently doing or you just nudged a reminder to utilize something? So we'll give you a few moments to select a response. I know as soon as I found out about the customized content, I went in and selected a bunch of different topics.

And I have been receiving emails and I find that so useful to get that targeted information. So maybe that's what you'll utilize. My computer never makes noises, so if you just heard that ding, I apologize. All right, I'm going to go ahead and see what resources you all are going to use. It's a pretty good mix. I love that a number of you are going to read today's news and bookmarking a resource you'll use. That is a great benefit of the web page. So awesome. I also love the development opportunity.

So Thank you. Thank you for utilizing our benefits. And we would love to hear from you. So if there's something that we're not currently offering that you would find helpful, please reach out and provide that feedback. Especially as Sarah said, your feedback is very valuable and does shape our conversations and guides our work.

NASFAA 101: Supporting the Work You Do Q&A

All right, Jackie, do we have any questions?

We do. We had one question that I wanted to mention. I just want to remind folks that if you need your certificate of attendance, go ahead and download it now. And we will ask that you complete the feedback survey. It will automatically launch when we close the webinar.

We were able to answer most of the questions that came in during the presentation. But there was one question I wanted to highlight. Not that we were going to get into the regulatory part of this question. Was there ever final clarification on how to calculate time to credential? I wanted to highlight this question to show how all the departments work together.

So our policy team, and Sarah, you could speak on this, had a Q&A with a lawyer to talk about the issue and the background with the expected time to credential guidance. So our policy team worked on that. They put together a great article. It was pushed out in today's news. So everyone could see that. But we also tied that to an Ask Regs article. So I was able to send this member our latest Ask Regs article about this. But I just wanted to show this as an example of how all of the departments at NASFAA try to work together to get you the latest and greatest.

So even if you don't use Ask Regs regularly, you may look at today's news and you will see articles about things going on that our policy team has drafted. And so we try to get you the information in different ways. I know Natalie will post in Slack and see like, hey, when people are asking questions in Slack, hey, we did just recently post this or this is something that I will bring to our team's attention. And like Sarah said, we'll start investigating that. So just thought that was a good way of showing how we all work together. I'm looking to see if we had any other questions.

Another question that could help several others, how do I find certificates for past webinars that you've attended? You can always go back to the webinar. It's on demand. So when you click on that link, which is the same link that you enter, used to enter this webinar, you're going to see the platform. It's going to look very similar to the live platform. You just click on View My Certificate and it will go ahead and download that for you. It will automatically capture the time that you've spent live. If you weren't able to reach all your total minutes and need to go to the on-demand recording, it'll pick up right from that point.

So whether you watch live or on demand, your certificate is available. I wanted to bring that up. So any last words before we end things today? No, just a thank you for tuning in and being our members. Thank you all for joining us today. We hope you have a great day. And again, fill out the feedback survey when you get a chance once we end the webinar. Thank you. Bye.