Charter: Compliance Engine Task Force

January 2016

NASFAA
NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

Timeline & Commitment

Start date: February 2016
End date: July 2016

This group will meet only virtually, by conference call or webinar (as needed). Calls and emails will take place regularly. We expect the commitment to be 5-10 hours each month.

Composition

- Chair: Lester McKenzie, Tennessee Tech
- Commission Director: Keith Williams, Michigan State
- Kochie Vaughan, North Carolina Central University
- Caroline Bitter, Salt Lake Community College
- Will Pena, Southern New Hampshire University
- Gary Spoales, American Public University System
- Shannon Crossland, Texas Tech University
- Victoria Lim, University of California, Berkeley
- NASFAA Staff Liaisons: Carrie Conrad, Beth Maglione, Mindy Eline, Dana Kelly

Background & Purpose

In 2016, NASFAA will bring a new offering to members - the Compliance Engine. Initially based off two of NASFAA's most popular PDF-format tools – the Self-Evaluation Guide and the Policies and Procedures Tool – this two-part, online tool will help members manage the administrative needs of their offices.

1. The Compliance Engine will use a series of self-assessments that can be assigned to individuals or other offices on campus to help members ensure they are in compliance with latest federal regulations.

2. The P&P Builder, a Compliance Engine module, allows users to create, manage, assign, save, and repurpose their offices' policies and procedures manuals online. Members can save their personalized manuals from year to year, edit them, and collaborate on changes.

A major benefit to the new Compliance Engine/P&P Builder will be the ability for NASFAA to push out updates to members when any changes are made to any section of the tool.

NASFAA plans to roll out the beta Compliance Engine in summer 2016, and the P&P Builder module afterwards. The web tool which will power both modules is currently in development. Once the beta online tool is finalized, NASFAA needs a group of members to assist in testing and content prioritization/display. The team will also assist in providing feedback on functionality for consideration in future (post-beta) versions of the tool.

Task Force Members' Duties & Responsibilities

Task-Force Specific Duties

Members have a unique perspective on user-level functionality and compliance needs that staff cannot replicate. That's why we need a task force of members to serve as a focus group to help the project team in the following areas:

- Evaluating and advising on content priorities and architecture within tool
- Providing feedback on user-friendliness
- Testing tool navigation, beta functionality, content delivery, and specialized functions

General Duties

- Attend all task force meetings and conference calls and participate in the deliberations.
- Notify the task force chair and the staff liaison if circumstances prevent attendance at a particular meeting;
- Adhere to deadlines for submission of task force assignments;
- Review all agenda items and background documents prior to each task force meeting and come prepared for the discussions; and
- Serve as recording secretary for a task force meeting if requested by the task force chair.

Indicators of Success & Outcomes

To provide the valuable user perspective and help the project team deliver a fully functioning Compliance Engine tool that has been adequately tested and debugged. The delivered product will address member, consumer, and association needs for content, functionality, design and usability, and launch on time and on budget.

Budget

Minimal planned expenditures.