

NASFAA's "Off the Cuff" Podcast – Episode 362 Transcript

OTC Inside The Beltway: Working Through OBBBA Guidance With Blue Icon

Melanie Storey:

Hello, hello and welcome back to Off the Cuff. We have a lot of special guests today. I am super excited in this what I will say continuing time of, I'll just go with chaos, but a lot of work going on, particularly as it relates to OB3 as we catapult towards July 1 in full implementation.

I am excited to welcome some folks from Blue Icon, our Blue Icon team here at NASFAA as well as some other folks who support or work with Blue Icon just to talk a little bit about some of the ways that both NASFAA and Blue Icon can support institutions through all of the work that we are facing. We're going to talk a little bit about staff training opportunities and ways in which Blue Icon can help navigate challenges related to the recent guidance, the compressed implementation, as well as other resources that financial aid offices may be able to tap into.

But before we get into that, let me introduce David Page. David is one of our Blue Icon rockstars and so he is going to lead today's conversation. So I'll let David say hello and introduce our other guests.

David Page:

Thanks, Melanie. Hello everybody. David Page, senior business development specialist with Blue Icon and it is a pleasure to be here. This is I think one of my... not one, but I think the very first participation on Off the Cuff. And so I am excited to be here and have this conversation.

But just a little quick recap about Blue Icon just in case people are not familiar with what we do. We are the consulting arm of NASFAA and I actually, little bit of honesty here, I was on a board member either coming on or rolling off right when the NASFAA board decided to launch Blue Icon way back when.

Melanie Storey:

I didn't know that, David. That's-

David Page:

Very thankful for... Yeah. Yeah. I was at that moment.

Melanie Storey:

Great.

David Page:

So one of the things that I count as one of my professional highlights, if you will, because I think Blue Icon is a service that our community needs. And of course, I believe it's one of the premier organizations out there that provide support to the financial aid community. And I'm not just saying that because I obviously work for Blue Icon in NASFAA, but because I know what we do and I know what NASFAA does. And I tell you as an aid administrator who was aware of NASFAA and had opportunities to sit on the board and things of that nature. But until I became a NASFAA employee and saw what really happens behind the scenes, it's a different appreciation. And I know why we can't hire every financial aid employee, but if you ever get the chance to see how the... what's the saying to say how we beached the wave-

Melanie Storey:

How the NASFAA sausage is made. How the NASFAA sausage is made, David.

David Page:

There you go. It's quite something and you guys would really have a deeper appreciation for the team at NASFAA. But with that said, Blue Icon, we do provide a lot of service opportunities for the community. One of the biggest things that we deal with is the standards of excellence review program that we do that NASFAA has done for quite some time. We took it over when Blue Icon was launched and that is an opportunity for campuses to have a peer-to-peer review of your office, very similar to what the federal program review would do with the exception of, of course, we cannot do any finance. And so that if you are a new aid administrator, new director, if you will, a new president or chancellor, I would strongly advise you to have an SOE review done on your campus so that you can know what it is you are walking into and then have a path forward on how you can make the office, if it needs to be, make the office even stronger than what it is.

So we do that. We also do consulting, general consulting. We do operational reviews. We do compliance reviews. We offer training, which we're going to talk about later on, but we've also started doing some executive coaching and with that, we offer and provide trusted advisors to individuals to help them navigate their desk. So whether they're a new director or we've worked before with vice presidents who are now responsible for financial aid and don't quite know all that needs to be known about running or leading rather a financial aid unit, we coach them through that. And so we offer that as well.

A couple other things, I would invite you to the website to take a look at all of the services that we offer and we'll spend some more time specifically, like I said, about training later on. We have to date done over 700 projects with campuses and universities that are national members. And specifically with training, we've done about 33 training projects over the course of time with different schools, projects with the school, but we offer multiple trainings to one school. So that takes us over 100 or so training topics that we have offered to schools. And so we do that by using the financial aid community, our consultants, which you will see and hear from one today.

But before we get to that, I want to introduce one of our clients who is a national member that has been a great partner for us and that is Rachel. Now Rachel, if you don't mind introducing Renee at that point.

Rachel Andersen:

Sure. Thanks, David. So my name is Rachel Andersen. I am the director of financial aid and scholarships at Cuyamaca College in San Diego, California. Don't be jealous. It's always beautiful here.

Melanie Storey:

I heard it rained yesterday though, Rachel. I heard from another San Diegan that it rained yesterday.

Rachel Andersen:

It was a brisk 56 degrees with some drizzles. So we were suffering yesterday. Thank you for your kind thoughts, but we made it through.

Melanie Storey:

Thoughts and prayers to San Diego for that.

Rachel Andersen:

Thoughts and prayers, yes. But we made it through. Now we're at 64 with some sunshine. So we're thriving again. Thankfully.

Melanie Storey:

Excellent. Good to know.

Rachel Andersen:

But I am a relatively new director. I've been in financial aid just under a decade, maybe eight years or so. Started as an admin assistant, worked my way up to a technician or advisor, processing student files, completing verification, SAP, R2T4s, all of those fun things. And the foundation to my training in financial aid was through NASFAA, joining NASFAAU courses, earning my certifications in all of the different areas.

So when I became a new director, I had met David a couple of times. He was my first phone call because I was in uncharted territory and really needed that support. And my foundation with NASFAA and Blue Icon was already laid. So I knew they were my first call to really get that support and make sure that I was well-prepared in navigating my first years as a financial aid director, but then also that my staff had the support that they needed to be successful in their roles. So re-laying the ground and setting a fresh expectation for all of us in our office.

I've had the privilege of participating in a couple of projects with David and Renee, which I know we'll get into, one being a new director coaching, which I highly recommend to folks who are able. That has been just monumental and just pivotal for what I believe has been a successful first couple of years. As a director, David worked really hard to pair me with another aid director with decades of experience within the same segment that I work in. I actually ended up knowing the individual. So we were able to build a really wonderful rapport and I was able to glean so many resources that I will leave behind me whenever I move on to my next campus enroll, which will not be for a very long time, but enjoy [inaudible 00:09:13]-

Melanie Storey:

Don't break news here, Rachel. Don't break news here. Yeah.

David Page:

Right. Right.

Rachel Andersen:

Yes. But the other topic we've been able to jump in on a project has been the group training, and David has connected me with Renee. I know we'll get into that training topic, but I'll leave this opportunity for Renee to share a little bit more about herself.

Renee Armentrout:

Hi, I'm Renee Armentrout and I am a Blue Icon consultant and I've been active since 2022 with consulting. So I've done various projects, compliance reviews for consumer information, a couple helping to write PNPs and some interim staffing. And so currently, yes, helping Rachel with the group training and working with her team on the various credentials so that her team can receive those NASFAA credentials and have that experience and that training. So thank you.

Melanie Storey:

Great.

David Page:

Appreciate that.

Melanie Storey:

Well, let me jump in a little bit here. Thanks to all three of you. I'm super thrilled to have you here. So we did have a little bit of news this week, I guess the end of last week, because who doesn't love a late Friday reg publication, right?

David Page:

Right.

Melanie Storey:

So last Friday we did see the final rules from the RISE committee, this is the loan rules related to OB3. And let me just say something when you look at those rules and I think we clarified this in our TN article, but you may also see it referred to as the Working Families Tax Cut Act. There are a lot of names for this particular piece of legislation. It started as HR1 and then something else and then OB3, one being Beautiful Bill Act. The department refers to it as the Working Families Tax Cut. So if you're confused or you think it's a different piece of legislation, nope, we're going to stick with OB3. That's kind of how we branded our things, but we're talking about the same thing, just in case there's any confusion on that.

But so several hundred pages of regulation and rule there. I commend the Today's News article to you for an excellent synthesis of anything and everything that maybe we thought was most important or where we saw changes. I'll highlight just a couple of them before we get into some of the nitty-gritty around the services and things and talk a little bit more about Blue Icon.

So one of the more significant clarifications was around, I think as most folks know, the new lifetime maximum loan limit. The department did amend the proposed rule text to explicitly state and eliminate any confusion about the lifetime maximum aggregate that a student can borrow as 257,500 excluding federal Direct PLUS or federal PLUS loans made to that student as a parent. The bottom line is this change makes it clear that graduate PLUS loans are to be accounted against that lifetime maximum limit.

You may recall that there was a little bit of confusion and some back and forth about what we saw as a reversal or a revision of previous communications and presentations and training we had seen from the department and they're moving fast too and these things will happen. It's just all the more important about how we get clear communication on these things and that we are able to track the implementation as well as they are. So we're grateful for that clarification. Regardless of whether or not it's what you want, it's better for us to be able to work through some certainty with certainty.

There was also some regulatory language addressing the schedule of reductions. I will say in my recent conversations with members and institution folks broadly, I have come to realize how schedule of reductions with so much ambiguity and likely the need for more manual work is a source of great concern and anxiety for institutions. There were a number of clarifications in the final rule around schedule of reduction. One was about the schedule of reduction as it relates to full-time enrollment on subscription-based programs. There's some details about that and what you do in that third subscription period.

Importantly, one of the things we had raised in comment was our concern around what we saw as double proration for students who were both subject to schedule of reduction for less than full-time enrollment and the existing requirement to prorate loans for programs that are shorter than an academic year or if they're just enrolled in their final period prior to their completion, that they could see their loans reduced twice.

The department did not make any changes to that. They argued that the rule will not reduce the same amount twice for the same reason, explaining that less than full-time enrollment affects the size of the annual cap, but the loan period and payment periods affect how the cap is distributed or limited. So because they see that as two steps to address different questions, their combined application is not double proration. We still have questions about that, let me just say that. So as we have continued and appreciate the good communication with the department, we're still trying to wrap our arms around that question.

I will say this about schedule of reduction and as I said, lots of questions. We know the department is trying to provide some flexibility, but that flexibility doesn't always feel comfortable when we don't feel like we know what the actual rules are, what the steps are and how to do it. And so we're trying to reconcile that. The department did say in its response that they're working on additional guidance with more scenarios, although they never hit all of the scenarios. There are thousands and thousands of them as we have thousands and thousands of students attending less than full time. But they did commit to some resources, a resource page with some FAQs and additional examples, like I said, but they're not making any changes to the final language and they feel like it sufficiently addresses all scenarios. So this, I'll take a deep breath, is where we will, I think, continue to spend some time to try to provide as much clarity as possible to folks.

I think we've commended this on Off the Cuff, certainly in Inside the Beltway. I know Karen has said this multiple times, but do go ahead and read the preamble. The preamble provides a little bit more color commentary, if you will, than sometimes what feels like inscrutable language of the rules. So I do sort of commend everybody to take a little bit of time and read the preamble, if that is of interest. They did talk in the preamble about particularly the comments related to the definition of professional student. They believe that their approach, they did not make any changes to those definitions. They believe that their approach is sound and defensible, though has a little bit of color commentary, but I'll try to read it exactly.

In the preamble they had something that said, "If a court disagrees with our analysis, we believe and intend that this portion of the regulation is entirely severable." Now that's a really interesting clause, isn't it?

So it suggests that they are anticipating legal challenge to that particular part of the rule around the definition of professional student. And there is some conversation, although lawsuits have not been filed, but what it says is they feel they can extract that part of the rule and if that goes under legal review, the rest of the rule would not be impacted. So now that's for a court to decide, but that is the position that they are taking. So that's just a few... There was a lot more. As I said, I commend the TN article, but just wanted to... Some of the more pressing things that we've been following.

One other thing I'll direct folks' attention to if you haven't already seen it is another article in Today's News really addressing the specific challenges that header schools are facing, schools that already have students showing up on campus early May who are going to be subject to rules that take place on July 1, go into effect on July 1 and for which we do not have final guidance. We have the rules, but there's still a lot of uncertainty.

And that really puts schools in an untenable position and who are trying to act in good faith and implement these rules. And so that is just, there's a really great article, Heidi Carl, NASFAA's current

board chair and others weighing in header schools on the challenges they're facing. And so it may not be an uplifting read, but maybe there's a little bit of strength in community if that's something you're working through to know and read and understand there.

So we also know that our partners in the software world, our vendors, our management systems, our financial aid management systems, others are working hard under untenable deadlines too and that our institutions are also beholden to them. And so we continue to hope that the department will maybe consider some flexibilities for schools and we're going to be asking them for that.

We are all in this together. And I have said this before, the department has asked for some patience and grace and I understand that Congress gave them a tough task. I don't think it is unreasonable for us to ask for a little bit of that grace in return. But at this point, here we are 56 days out from July 1, which means 54, 53 days from NASFAA's National Conference, which gives me some pause. But we will have Department of Ed folks at the national conference, including the undersecretary on the eve of July 1 implementation to talk to us about how it's going. But I know there is an enormous amount of work to happen in the days in between and it is an incredibly stressful time for institutions.

So let me stop there. I think I'll ask Rachel just to talk a little bit about what's going on in your institution, how you're handling it. You want to talk about where Blue Icon might be able to support, but interested to hear what you're experiencing.

Rachel Andersen:

Sure. Yes, thank you. I think I'll reiterate what I said earlier that I feel like I'm, as a financial aid professional walking through uncharted territory, it feels a little bit like building the plane while we're flying it. So I think I'm personally feeling that anxiety with the commencement of the '26, '27 aid year because being a financial aid director, I feel as though folks are looking to me to be well-informed, develop a plan of action since this is my wheelhouse, this is my job, it's my area of expertise, but I'm just one person trying to parse through the legal jargon and it's overwhelming for someone who doesn't necessarily have that political background, that legal background to parse through that information.

I can definitely say from my experience, there's been that sense of unease and a little bit of an anxiety. I know this is something David and I spoke about, gosh, just under a year ago and he was saying, "How are you preparing for OB3?" And I said, "Let's kick the can down the road. I don't want to deal with it right now." And I don't know if you remember that conversation.

David Page:

Yeah, I do.

Rachel Andersen:

But there's no more kicking the can down the road. The time is upon us. So I think that's where I feel so thankful for having the support of NASFAA, NASFAA AskRegs and Blue Icon to help in interpreting and disseminating the information to my staff, to my leadership. That's been extremely helpful and we happen to kind of speaking about the new guidance when it comes to loans. Renee and I just finished our staff training on loans last week. Just before the new guidance dropped, that email was sent at 5 PM and then everybody was gone for the weekend.

Melanie Storey:

You're Like, "Let's come back together." Yeah?

Rachel Andersen:

Yes, exactly. But it was really great in the sense that we were able to start that conversation with the staff because like you said, Melanie, it's going to be very manual. Our software providers are doing what they can to adjust and pivot and get us what we need in order to be compliant, but a lot of it will be manual on the staff when it comes to proration and things of that nature.

So having that conversation last week with the staff as a whole was very, very timely. What is amazing about Blue Icon and then I'll let David and Renee jump in, is that the trainings they provided have been dynamic. So we're able to customize it for our school, but with every new piece of guidance or any change that has been incorporated into our training pretty quickly. So I feel as though even though we got our training right before additional guidance was provided, we were still on the cusp and we're still right on the cutting edge of making sure that we had the most up-to-date information that we had at that point.

So I don't know if David or Renee, either of you want to speak to that as well.

David Page:

Well, on that topic, I'll let Renee come in, if she has something to say, then I do have a follow-up question that can lead us right into the longer piece of this training conversation. So Renee, if you wanted to share something to add onto that?

Renee Armentrout:

Yeah, I just think it was helpful for that cross-training. I could just use the caveat that this wasn't final regulations yet, so things may change. So we didn't have to go in too much detail on the examples, but to be able to provide that information to their staff just so that they were aware of upcoming changes or if there'd been other changes throughout the year, we were able to address those again as we did trainings every other month or so. So yeah, it was good.

David Page:

Good, good, good. So Rachel, you mentioned it's going to be manual for a period of time and I think that to me is the perfect reason why staff need to be trained appropriately because when it's the system doing the work, your knowledge level might not have to be as strong as it should be, but when you're doing the work manually, there is no computerized, automated piece to catch what you might have missed in adding the two and carrying the one and then multiplying at times or whatever or whatever the automation is. And so speak to us a little bit about the need for training or why staff training is so important, particularly in this season of what's getting ready to launch July 1 and beyond.

Rachel Andersen:

Yeah, I would say, I mean, for me, staff training is paramount, especially in the financial aid world because financial aid folks are a different breed where the field is filled with dynamic professionals who are able to be malleable and adjust and pivot on the spot. And we have to because as we're seeing, especially in this season, the regulations and the guidance are ever-changing. So we need to be adaptable with that.

So I think the importance of this staff training really comes into effect regardless of if you're a summer header or trailer, especially with OB3, you have professionals who are needing to provide their professional judgment and their expertise into two sets of regulations. They still need to carry all of that

knowledge from '25, '26 as we close out that year, but then also apply that new knowledge to the '26, '27 changes that are coming at us.

So having that hands-on training... because computers aren't perfect, software isn't perfect. Our providers are doing everything they can and they're amazing to provide that support to us, but that may fail at times. So it is important for staff not to just always rely on the software, to double check that software as well. So using loans as an example, that that is going to be manual, they will be able to double check the system, make sure that it's working properly because this is a lot to ask our software providers to just make sure it works and it functions and we're trusting you.

In my opinion, the Department of Ed is going to say, "It's not our fault your software didn't work correctly." So our teams need to be prepared to double check that we can use the software as a tool, but we need to validate that information.

So I mean, along the same lines of these loans and proration that's going to be manual, my staff does the hand calcs for R2T4s. Renee, in doing that training with us, we all learn how to make sure we do hand calcs so that yes, we rely on the system and the software, but just in case something's not quite right, maybe a date isn't correct in the system, they're able to double check and validate that information. So it's extremely important. It's necessary because again, if a system fails us and our staff isn't adequately trained, then we're not administratively capable. Hopefully that speaks to your question.

David Page:

No, no, no it does because you're right, when the auditors do come or if the Department of Ed comes in, yes, that excuse is not going to go far. So you're exactly right. And kudos to those individuals who learn how to do that hand calc with the R2T4. Hey, you can take everyone that I never did while I was on the college campus because I was thankful I became the director in the office and I told somebody else to deal with that, just make sure it's right. Okay that's...

But so we talked about the training aspect as far as the need for it, but daily if... Well, most of daily it seems like, but at least weekly, we are hearing about campuses going through budget cuts and reduction across the board and some of us might have the luxury of how you cut the blank percentage. Some of us might not have that luxury. You might be told to you what you're going to cut.

But how do you make the case and, Renee, you can tag in here too from a consultant and a director too, but Rachel, how do you make the case for ensuring that the institution makes the financial investment to the financial aid team there to ensure training takes place when you're being given a notice that for the next two years, everybody's going to have a 30% budget cut across the board?

Rachel Andersen:

Yeah. I think for me, I present the changes that are happening at the Department of Education level, and then also at the state level as well, so we're talking federal and state. So I'm presenting those changes. But for me, I've also been mentored to advocate for that training using data.

So I'm looking at our institutional data where we're at and where we need to be in order to be administratively capable. And if there is a gap, that highlights the necessity, the need for training. It's not an option. But then what I have done is I've circled back and essentially shown the return on investment. This is where we were and this is where we needed to be to be administratively capable and this is how training has closed the gap. So I picked one or two topics and was able to do that cost benefit analysis after the fact to show the return on investment to make the argument for more and additional trainings to ensure our staff is well-prepared.

But like you said, there are always budget cuts happening. So that's something else that I'm doing is presenting the logic of investment for staff training and making those arguments every year when I'm building my budget for the coming year, when I'm requesting funds for the following year. So that has been the way that I've been able to present it using data because numbers don't lie. And honestly, at the end of the day, no matter what institution you're at, it comes down to dollars and cents. We are here to serve the students, but if we don't have those dollars and cents, then we can't serve those students. So essentially using the data, but then also translating it into money because that's what keeps the institutions going in my personal opinion.

David Page:

No, I think we would all agree with that.

Rachel Andersen:

Yeah.

David Page:

I mean, Renee, I'm sorry, anything to add to that?

Renee Armentrout:

I know there's reports available also. So being administratively capable, there's just the audit violation. So just determine on the risk that your institution is willing to take and you can share with them of how many thousands of dollars it could be if you were not found compliant in certain areas. So making sure you get training in those and everyone understands how to do those processes and procedures would help to stay compliant and avoid those fines that you could receive.

David Page:

Yeah. I think we are up to, what is it? It's just a little bit over 71,000 per fine now if they find something. So yeah, as some of our students, well, back in the day they used to say, if it don't make dollars, it don't make sense. And so if you're not providing the resources to your team to get them the support they need, which is training, then yeah, it's going to cost you. One way or the other, it's going to cost you. Your choices decide how much it costs you, right?

And so we talk about the budget cuts, but there are some creative ways we can deal with training and one is, Melanie shared earlier how many days we have to the NASFAA conference in person, but we also know that one of the benefits of being a NASFAA member, we now have the opportunity for those who can't travel to this year DC in person, we have the virtual summit that would take place.

So quick plug and push for those of you who have the means to do so, the NASFAA Virtual Summit will take place July 13th through the 16th. It is open. I think registration is now open if I'm not mistaken and it is available for members. So please take advantage of that because that's another opportunity to where if cost is an issue, then you have the opportunity to join us virtually.

And I believe the agenda is out there on the NASFAA website and I'm sure you will be seeing a lot more information about registering for the virtual summit in the coming weeks. And so we want you guys to take advantage of that as well.

Any other creative solutions? I think a couple. When we talk about, particularly for those of us who are in communities where there are multiple campuses, right? If you're in the city San Diego, there's probably what, six, seven, eight schools there, however many it is. Creatively, maybe you all join in

together and reach out to Blue Icon for a training that could be offered to several campuses there all at once. That's a way to help defray costs.

Back when I was on a campus in New Orleans, there are seven colleges and universities in New Orleans and we had our own mini financial aid association, if you will. They had a name for it. And we did kept citywide training where we would go to one of the campuses and someone would come in or somebody in the aid office would take charge and meet out in a conversation and do training for that day. And that helped to defray costs when travel was not an opportunity for everyone.

So there are creative ways to do that and Blue Icon would love to be your partner in that because we can travel and do training in person or we can do training remotely. And so we invite you to reach out to us for that capacity.

Rachel Andersen:

Can I say, David, too, that Blue Icon was really helpful for me, especially in my first year as a director, learning the strings as far as budgets and my accounts and everything. Blue Icon really worked with me to find a solution that fit my budget needs, but also fit my staff training needs. So video conferencing was the right option for us that fit our budget, but we still received amazing training and support.

It wasn't any more or less because someone wasn't in person. It's what worked for our budget. And Blue Icon is dedicated to excellence, and so they have provided that service for us. Renee has been an amazing resource for us doing the live training video conference with our staff, but then also staying in touch with me in between topics, building those case studies. So there are options, I just want to put it out there for those folks who are trying to be budget conscious. You don't have to sacrifice that staff training or the excellent opportunity of getting access to those resources just because you think that budget might be a constraint. It's always worth the phone call and the conversation in my opinion.

David Page:

Absolutely. Absolutely. And so Renee, talk to us a little bit about, as you did training, because you've done quite a few for us and we appreciate that, but like some of the skills and some of the time and the energy that you brought to the training and your past experiences, how that has helped you be a great trainer for some of our schools out there.

Renee Armentrout:

I just love to be able to help other schools that may not have the resources like with the interim staffing and things like that, or to build their P&P that just don't have the time and the energy and it's an overwhelming task. So for Rachel to have to create these trainings and these case studies and do that things while also directing her office can be challenging and time-consuming, I'm able to do that in the background and just figure out through her P&Ps using those as a resource also to be able to train the staff and have those conversations with them so that we can give real life examples to the P&Ps. And if they have a student come in are... They had great conversations about different things that they are seeing in the office and how can we work with that.

So being able to stay up on the NASFAA resources and the current regulations and everything, because those are constantly changing just to be able to provide that, "Hey, this is coming up, make sure you're ready," and things like that. So yeah, it's been a great experience.

David Page:

Appreciate that. And you mentioned one other service line that I failed to mention earlier, but one that's very important and that's policies and procedures assistance that we do. We do offer policies and procedures manual writing for campuses because we know as I say time and time again, it's always on everyone's to do list, but unfortunately there are other priorities that you guys have to deal with and so it keeps getting pushed down the to do list. So that will be a great opportunity to allow Blue Icon to come in and do that writing for your office. And we take what you have, we make it stronger or we update it so that it includes everything that it needs to include because we do know that writing policies and procedures, yes, they are important, but they are time-consuming.

And we actually have people on our team who absolutely love writing policies and procedures. God bless them. They actually love writing policies and procedures and they-

Melanie Storey:

It's right there with the R2T4 people with me.

David Page:

[inaudible 00:39:53].

Melanie Storey:

It's like you are a special breed right there. I love you, but good grief.

David Page:

Yes, yes, yes. Night writing, evening wide writing, hey, they love to do it. And so we would love to be a partner with you in that as well. Yeah.

Rachel Andersen:

I'll say too, David, I'm such a fan of Blue Icon, honestly, because it's been so foundational for me and such a support to me, but Blue Icon provided support in strengthening our P&Ps in my first year. They really came in and helped make sure that they were robust and compliant. But on top of that, budget-wise, I can't pay for Blue Icon every year to come in and update our P&Ps. So the P&P Builder on the website is amazing because I know I have strong P&Ps that were foundational for me in my first year, but now I can go into that P&P builder and it points out exactly where there are change to regulation.

So I don't need to rewrite the script every single year. All I need to do is look at where those updates are happening and make sure that I'm updating those throughout the year. And if I can just stay up to date on the changes, then what has been done for me by Blue Icon in the beginning, that good work remains. So just again, another shout out and a way for folks who are being budget conscious, if you do it once, you just got to stay up on the changes.

David Page:

Appreciate that. And you used the NASFAA product, which is the NASFAA P&P Builder that NASFAA has as a service opportunity. So while, yes, there are other options out there, but we know that the product that NASFAA has put out there is a very compliant, complete product and it is a source of an opportunity for campuses to use that through either membership or in addition to their membership, to use that as a service that they can have that manual, maintain it. It's relatively easy to maintain and relatively easy to use and to spread out. And so you don't have to have that paper document anymore. You can have that online version and that's accessible by everyone. So we could also talk to you about that.

So I think now I would move to a conversation about how you reach out to Blue Icon unless, Melanie, were you getting ready to say something or no?

Melanie Storey:

No, I was going to ask you, I was going to say, before we get too far, first of all, I think Rachel might be our Blue Icon's greatest hype person, so thanks for that. But really, I think it's important that just hearkening back to some of the changes that are coming, but that the services that Blue Icon offer run the gamut from things like P&P Builder, standards of excellence, kind of core work to make sure that an office is running efficiently, compliant, doing those things, to also training and managing through extraordinary change, right?

David Page:

Yes.

Melanie Storey:

So it kind of runs through that. And I think that's just a great thing to highlight and that while the investment might be hard at times, it's an important investment in success and compliance going forward when the auditors inevitably take a look and hopefully no program reviews, but those kinds of things.

But importantly, so David, say a little more about if folks are interested in talking to Blue Icon, what should they be doing?

David Page:

All right. So there are a couple of ways you can get in contact with us. Probably the easiest way is through the Blue Icon section on the NASFAA website. There is a contact us page there and you can fill out that form and ask a couple of questions about obviously yourself and the school and then what your ask is, and then that will come directly into our system and that we will take a look at it and then someone, either myself or my colleague, Tammy Harrison, will circle back around to you to have what we call a intake and then it goes from there once we understand what your ask is. And then our task is to find the right consultant that matches with you. And so we look for the match to be about systems, but we also look about type of schools and all of that.

So we try to match one-to-one, if you will, as closely as possible. And we thank you to all of our consultants who, by the way, are practicing financial aid administrators. So they are people that are working daily just like Renee is in their own shop, but they also have some extra time where they can... Yeah, right, in this day and age, but they do.

Melanie Storey:

How'd you do that?

Renee Armentrout:

Yeah, all the time.

Melanie Storey:

Tell us your secrets, really.

Renee Armentrout:
Don't let them know.

David Page:

They have time to help out colleges and universities. And we really saw this obviously when we had the FAFSA Simplification Project, when the aid community came through really strong to help our sister institutions out with getting through that particular situation.

And so that's the one way how you could reach out to us. Also, obviously we do try to attend as many regional conferences and definitely we will be at the national conference this year in DC. Come up to the booth, reach out to us that way. We'll be happy to visit with you. Then also via email or just a simple phone call. If you reach out to anyone on the NASFAA team, whoever you have a relationship with, I guarantee you they will direct you directly to someone at Blue Icon to help you. And then peer to peer, we appreciate schools referring us to different schools, to your colleagues to help out. And so we receive communication that way.

So it's quite a few ways to get to us. And then once you do, it will either be myself or Tammy visiting with you about your need and ask. And then we will be putting together a customized scope of work, if you will, that will identify what you need and share that out with your leadership team. And hopefully then at that point it gets approved and then we will move on through the approval process, contract process to get everything launched. And so the website is probably the main way, but certainly individually to us via our email address or at conferences or through various colleagues around the country, we will be more than happy to engage with you and have a conversation about how we can assist and move your campus forward.

Melanie Storey:

Great. Thanks, David. I just want to put a plus up, right, that those conversations are because the training and what you need are customized to you. You talked about whether it's around your software, type of school. There's lots of training opportunities out there, but this really can be customized to suit the needs of you and your institution. And I think that that's just really important.

There's also some other things. Let's Talk and group coaching.

David Page:

Yes.

Melanie Storey:

You can also look at things on the website and see what's there. Please encourage folks to do that. Thanks for mentioning the Virtual Summit. I'll just mention that it's an institutional registration, so it's not like an individual like it is at the national conference. And so if the Virtual Summit is an option, that is just a single registration for your school and you can consume it as you wish. But yes, we will welcome, we will see many folks at the national conference. Blue Icon will be there. Always happy to direct and talk about the important services and again, focused, customized service that Blue Icon can offer institutions separate from what NASFAA really is able to do.

So with that, a huge thanks to Renee and Rachel for joining us and of course you too, David.

David Page:

Thanks.

Melanie Storey:

Thrilled to see everyone. I know there is a lot of work in the next 50-ish days, but we will continue to support you. Look for more information as more things come out in TN and all of our other regular communications. And as always, thanks for joining Off the Cuff. Have a great day.