

Charter: Task Force on PPY Implementation

September 2015



Timeline & Commitment

Start date: October 2015
End date: March 2017

We expect emails and phone calls to comprise the bulk of the work, but the group will conduct at least one in-person meeting in Washington, DC.

Composition

Chair: Rachele Feldman, University of California-Berkley
Commission Director: Kay Soltis, Pacific Lutheran University

Task Force Members:

- Mo Amos, Northeastern Illinois University
- Heather Boutell, Bellarmine University
- Tarik Boyd, ECPI University
- Amanda Jacobsen, Salt Lake Community College
- Raul Lema, El Paso Community College
- Mark Lindenmeyer, Loyola University Maryland
- Mike Miller, University of California-Santa Barbara
- Eileen O'Leary, Stonehill College

Resource Group Members

- Suzy Allen, University of New Hampshire
- Karen Hanley, Georgetown University
- Alyssa Dobson, Slippery Rock University of Pennsylvania
- Vickie Crupper, University of Michigan
- David Peterson, Indiana University-Purdue University of Fort Wayne
- Douglas Levy, Macomb Community College
- Candi Frazier, West Virginia University
- Rod Oto, Carleton College
- Mary Sommers, University of Nebraska at Kearney
- Tom Biedsched, Colorado State University
- Marty Somero, University of Northern Colorado
- Kent McGowan, The University of Montana
- Michael Bennett, St. Petersburg College Clearwater Campus
- Bonnie Joerschke, University of Georgia
- Ron Day, Kennesaw State University
- Sandy Neel, University of Louisville
- Liz Rollins, York Technical College
- Bruce Blackmon, University of North Carolina at Charlotte
- Latasha Goudeau, University of Houston-Downtown
- Virginia Tucker, New Mexico State University
- Lorie Staab, Pacific Lutheran University
- Maureen McRae Goldberg, Occidental College
- Sherrie Padilla, University of Hawaii at Hilo
- Heather Hall Lewis, University of Portland
- Jim White, Gonzaga University
- Marco Siliezar, University of California-Berkley
- Wendy Ortega, California State University

NASFAA Staff Liaison

- Megan McClean

Background & Purpose

Over the last few years, NASFAA advocated for the use of prior-prior year income data on the FAFSA and resulting need analysis calculations to reduce verification burden on students and schools and give students more time to make college going decisions. Besides the obvious timing benefits to students and families, our efforts were supported by research. After analyzing more than 70,000 student records from five years of data, NASFAA researchers found:

- Overall, most students did not see a significant change in their Pell Awards.
- The percentage of students whose Pell Grant awards would be affected varies considerably by institution.
- About 16-18% of students would see large changes in their Pell Grant awards (more than \$1,000 in either direction).
- A shift to PPY seems to work best for students from the lowest-income families, many of whom are independent students with dependents.

On September 14, 2015, President Obama announced that the Department of Education will use PPY income data for financial aid purposes beginning with the 2017-18 award year. As a result, NASFAA needs to identify potential roadblocks to successful implementation and develop strategies to overcome those barriers. Some of these issues may involve the following:

- IRS Data Retrieval Tool.
- Professional Judgment.
- Verification.
- Educating students and families.
- Admissions and recruitment processes.
- Funding timelines for other federal, state and/or institutional aid.

The task force will (1) proactively identify implementation issues and work through the NASFAA staff and collaborate with the US Department of Education on ensuring a successful rollout of PPY; (2) Solicit and deliver feedback from the NASFAA membership and board of directors on PPY rollout; (3) Identify best practices, Q&As, and trainings related to PPY for the NASFAA membership; (3) Identify and address any issues impacting financial aid computer systems during a PPY transition; (4) Facilitate collaborations with other key stakeholders invested in PPY, including the admission and state grant agency communities; and (5) Conduct a post-mortem as PPY is rolled out, delivering final recommendations on the evolution of PPY going forward.

Task Force Members' Duties & Responsibilities

- Attend all task force meetings 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 meeting and come prepared for the discussions;
- Serve as recording secretary for a task force meeting if requested by the task force chair; and
- Utilize the most economical means of transportation when attending a meeting and promptly file a travel reimbursement request.

Indicators of Success

The task force recommendations will be a comprehensive and practical guide that all school types may use to effectively transition from PY to PPY for the 2017-18 award year. NASFAA will also share the document with the Department with the hope it will influence policy and implementation decisions.

Budget

Planned expenditures are approximately \$15,000 over the next 18 months.