

# nasfaanow

## annual impact report

- ▶ verification - what went wrong?
- ▶ celebrating 20 years of excellence
- ▶ five projects our dme intern loved
- ▶ higher education act reauthorization

## diversity and implicit bias

addressing bias and  
microaggressions  
in the workplace

- ▶ did they really just say that?!
- ▶ 50 college leaders working together for change
- ▶ making your mental health a priority
- ▶ plus: 2018 conference photos and movers & shakers!



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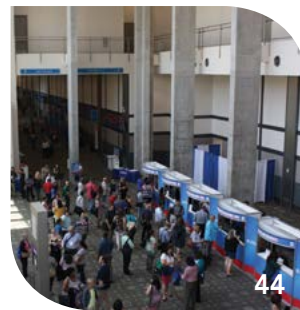
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# playing a winning hand

a message from the president

2017-18 was another year of challenges and successes for the financial aid profession. But whatever is thrown our way, I know one thing for sure: betting on our members is always a safe wager. I've never known a group of individuals more dedicated to supporting students, families, communities, and the core ideals of higher education access and success. Where we lead, we succeed!

NASFAA had a big year in terms of federal advocacy. In policy work, it's always important to know your opponents, be clear on your strategy, and play your cards right. In 2017-18, NASFAA expanded our reach by helping policymakers understand the complexity of financial aid through testimony in public hearings on key issues and by ensuring NASFAA members are getting facetime with policymakers via our Advocacy Pipeline program:

- On July 10, 2017, NASFAA Vice President Megan Coval testified at the U.S. Department of Education's public hearing on rewriting the borrower defense to repayment and gainful employment regulations.
- On October 4, 2017, NASFAA Director of Policy Analysis Karen McCarthy testified at the Department's public hearing on regulatory reform, highlighting three challenging regulations: return of Title IV funds (R2T4), subsidized usage limits (SULA), and verification.
- On November 28, 2017, I testified before the Senate Health, Education, Labor, and Pensions (HELP) Committee on balancing accuracy and simplicity. I outlined NASFAA's FAFSA simplification proposal, which proposes leveraging already-held federal government tax data and means-tested benefit recipient information to create an accurate, simple federal student aid application process.
- Now in its sixth year, our Advocacy Pipeline initiative brought 23 NASFAA members to Capitol Hill to discuss HEA reauthorization priorities and the importance of sustained investment in student aid. Pipeline members visited the offices of 23 Republican and 22 Democratic lawmakers, reflecting NASFAA's nonpartisan advocacy agenda.

I'm also glad to report that we doubled down on service to members this year while simultaneously keeping your costs low. The Board annually approves and monitors a break-even budget, and for 2018-19, that budget once again includes no dues increase.

Three of the most exciting new ways NASFAA is serving members include areas of diversity and inclusion, professional certification, and leadership training:

- NASFAA's new Diversity Leadership Program (DLP) provides selectees from a wide range of diverse backgrounds with a robust portfolio of benefits, mentorship, and guidance on how to develop as a financial aid association leader. NASFAA developed the program after extensive conversations with our diversity officer, Board, and regional association leaders.
- In June, we announced the Certified Financial Aid Administrator (CFAA) program, a first-in-the-industry effort created in response to increasing demand from NASFAA's members. CFAA validates the skills and knowledge of financial aid professionals at higher education institutions across state, regional, and national levels.
- The 2019 Leadership & Legislative Conference & Expo now includes a new track: Advanced Topics in Financial Aid Leadership. We've also launched a new podcast, Director Download, focused on many pivotal leadership and management issues to be addressed at the Leadership Conference.

NASFAA's Board, staff and our many volunteers continue to work hard to improve service to members, keep costs low, and ensure that your membership in NASFAA is the "ace up your sleeve."

A stylized, handwritten signature in blue ink, appearing to read 'JD' followed by a long, sweeping horizontal line.

Justin Draeger, NASFAA President and CEO

# fulfilling our calling

a message from the 2017-18 national chair



What an honor it has been for me to serve the NASFAA membership as your national chair this past year. It was never an opportunity taken for granted, and I truly hope I lived up to your expectations.

As I traveled the country this past year, I had the privilege of updating our members on NASFAA's work and accomplishments. I am happy to report that they were both significant and numerous! In addition to the outstanding work of the NASFAA staff, nine task forces staffed by 377 volunteers (109 who were first timers) and the Board of Directors gave of their time and talent to advance our goals. We focused on the three main tenets of our mission: professional development for our members, advocacy for students, and serving as a forum on financial aid issues. I want to briefly summarize a few of the many accomplishments in those areas.

We expanded and improved our portfolio of **professional development** initiatives by adding a live-streaming option for our members who were unable to attend our national conference, successfully executing four tracks for our Leadership & Legislative Conference & Expo, hosting six webinars, and hitting our target of over 11,000 NASFAA U credentials earned by over 4,000 individuals. We're focusing additional efforts on getting members to fully utilize their benefits.

This year we created our newest initiative, the Diversity Leadership Program, to identify, educate, and train potential leaders from a broad range of diverse backgrounds. This program will provide members from underrepresented groups with support and leadership opportunities; advance participants' careers with professional development; and expand the field of talented, motivated leaders from diverse backgrounds who are ready to lead at the national, state, and regional levels.

On the **advocacy** front, I am also happy to share that through the efforts of NASFAA President, Justin Draeger and his policy staff, NASFAA is now viewed as the "go to" organization for all things related to financial aid in D.C. That relationship-building has elevated our voice and impact on Capitol Hill. We had a direct impact and leadership role in the omnibus spending bill that increased the maximum Federal Pell Grant for 2018-19 by \$175, and we also championed the "fix" to the federal data-sharing restrictions.

In May, NASFAA hosted a live **forum** on accountability and risk sharing in Washington, DC. An expert panel of two higher education researchers and a director of financial aid shared their thoughts on the subject and answered questions from the audience.

Another, larger-scale forum—and one of the most exciting projects launched this year—is the Higher Education Committee of 50. NASFAA received a grant to convene a representative group of institutional leaders tasked with developing and disseminating innovative, forward-thinking financial aid policy solutions to increase college access, affordability, transparency, and accountability. Their report will be released in early 2019.

In closing, I'd like to add that each time I had a microphone this year, I spoke of my belief that what we do is a calling. We do what we do for students, and, as a result, we pursue a noble profession. Our jobs are hard and only those in the trenches with us really get it. So, I want to give you a year's worth of strokes and praise, thank you for the work you do, and encourage you to keep at it!

Billie Jo Hamilton, 2017-18 National Chair

# higher education act reauthorization:

progress has been made, but there's still a long road ahead

The Higher Education Act (HEA), the law that governs the nation's higher education system and Title IV programs, is nearly five years overdue to be reauthorized. In the past five years, there have been efforts to start the process through smaller packages of draft bills and solicitation of comments from the community. The most significant step forward occurred in December 2017 with the introduction of the House Republican Promoting Real Opportunity, Success, and Prosperity through Education Reform (PROSPER) Act. The bill, which passed out of the House Committee on Education and the Workforce on a party-line vote, would make significant changes to the Title IV programs and how they operate.

Coming in at over 500 pages, the PROSPER Act is a comprehensive reauthorization bill and a clear marker of where the House Republicans (currently the majority party in the House) stand on the future of higher education. As with any piece of legislation that large, PROSPER included areas and concepts NASFAA supported as well as areas that raised our concern.

## Concepts Supported by NASFAA

### Access

- **Pell Grant Bonus:** PROSPER would increase Federal Pell Grants for students enrolled in a workload that would lead them to complete 30 or more credit hours (or the equivalent) per award year. The carrot-over-stick approach of a "bonus" encourages students to enroll in additional coursework, if capable, but it does not punish students who may be unable to take a 15-credit or more course load in a semester.

- **Increase to Undergraduate Loan Limits:** Federal student loans have become more of an access vehicle to higher education than ever before. Increasingly, students rely on federal student loans to afford their education. PROSPER would increase both annual and aggregate federal student loan limits for undergraduates.
- **Ability to Benefit:** Requiring students to first get a GED in order to enroll in a postsecondary degree or certificate program prolongs their time to credential completion and, in many cases, impacts their ability to obtain well-paying jobs and support their families. PROSPER would instead grant aid eligibility to any otherwise eligible student upon satisfactory completion of six credit hours or the equivalent that are applicable toward a degree or certificate.

### Simplification

- **Elimination of Origination Fees:** Origination fees act as a tax on students collected by withholding a portion of the loan proceeds but requiring repayment of the full loan amount before deduction of fees, plus interest. The bill would eliminate all federal student loan origination fees.
- **Streamlined Repayment Options:** The federal student loan program provides numerous protections for struggling borrowers, including the ability to repay student loans based on income, but the process is cumbersome and complex for too many borrowers. PROSPER would merge these into two options: a standard 10-year plan and an income-based repayment plan.



### Flexibility

- **Institutional Authority to Limit Loans:** Though institutions are held accountable for the repayment behavior of their students, schools currently have little ability to prevent students from overborrowing. The PROSPER Act would allow institutions to reduce annual loan limits institution-wide or by academic program based on certain conditions.
- **Relaxation of Certain Federal Work-Study (FWS) Requirements:** With institutions located in a variety of geographic regions and locales, rigid, one-size-fits-all requirements for FWS positions can prevent some schools from awarding all of the program dollars available. Among other changes, PROSPER would eliminate requirements to use FWS for tutoring and literacy programs, and would eliminate the 25 percent private sector employment cap.

### Areas of Concern

#### Overall Loss of Student Aid Dollars

- **Program Elimination:** The PROSPER Act would eliminate a number of federal student aid programs in favor of simplification; however, there is no significant attempt to backfill the loss in aid elsewhere, which would leave students worse off. The PROSPER Act would eliminate
  - o Federal Supplemental Educational Opportunity Grants (FSEOG)
  - o Federal Direct subsidized loans for undergraduates
  - o Federal PLUS loans for graduate students
  - o Public Service Loan Forgiveness (PSLF) and other occupation-based forgiveness programs
  - o Time-based loan forgiveness in the income-driven repayment plans
  - o Teacher Education Assistance for College and Higher Education (TEACH) Grants
  - o Graduate student eligibility for Federal Work-Study (FWS)
- **Pell Grant Leveling:** The PROSPER Act does not include an increase to the Pell Grant maximum award and does not return the annual inflation-based increases to the maximum award.
- **Estimated Losses:** On February 7, 2018, the Congressional Budget Office released a cost estimate on the PROSPER Act indicating that, if enacted as written, it would result in a net loss of \$15 billion in student aid over the next 10 years.

### Potential Unintended Consequences

- **Modification of the Return of Title IV Funds Process:** The PROSPER Act would introduce a concept of risk-sharing where the institution takes on the full risk of student withdrawals, and there is no point at which a student can earn 100 percent of their aid unless they complete. This may discourage schools from taking chances on populations of students who may be more at risk of stopping out before the completion of their program.
- **Rapid Allocation Changes in Work-Study:** The PROSPER Act would dramatically increase the authorized funding level for FWS and rapidly increase the institutional match in a revised allocation formula. On the latter, institutions with a high level of need and interest in FWS may not be able to shuffle resources quickly enough to fully support their FWS program.

### Increased Complexity

- **Mandated Weekly or Monthly Disbursements:** The PROSPER Act would mandate that schools disburse aid on a weekly or monthly basis—an idea known as “aid like a paycheck.” NASFAA believes weekly or monthly disbursements should be an option for schools, not a mandate.
- **Mandated Annual Counseling:** The PROSPER Act would mandate annual counseling for all Pell Grant and federal loan recipients as a condition of receiving aid. Instead of requiring annual counseling, NASFAA supports providing the authority for institutions to perform additional grant and loan counseling at the institution’s discretion.

### What’s Next?

While the PROSPER Act passed out of the House Committee on Education and the Workforce, it has not gone before the entire House of Representatives and is therefore still in the very early stages of the legislative process. In July 2018, House Democrats also released their version of a comprehensive draft HEA bill, the Aim Higher Act, which is quite different than PROSPER. Similar to PROSPER, however, the bill is lengthy and contains both areas NASFAA supports and areas that raise our concern. We take both bills seriously, however, and also recognize that the individual concepts and proposals they contain could show up in future iterations of HEA bills.

So, when will reauthorization of the HEA happen? Unfortunately, we still can’t provide a concrete answer to that question. But, the progress this past year has been significant and worthy of praise.

# governance

## Keeping NASFAA on track to meet its mission and achieve its goals

NASFAA is governed by a group of elected and appointed members in the form of our Board of Directors. The association concluded the first year of its 2017-20 Strategic Long-Range Plan in June 2018. This Board-approved plan sets the agenda and strategy for the association and is used as the basis for the annual Targets and Thresholds document, which sets operational goals and priorities for the work of the NASFAA staff.

The Board met three times in person and once by conference call in 2017-18. Significant Board actions between July 2017 and June 2018 included the following:

1. In fall 2017, the Board voted to hold institutional member dues steady for 2018-19, with no increase.
2. In March 2018, the Board reviewed the Leadership & Legislative Conference & Expo and approved the development of a new track for February 2019, tentatively called "Advanced Topics in Leadership Management." This track will focus on how leaders in the financial aid office can attain higher stature on campus.
3. At their March and June 2018 meetings, the Board of Directors carefully considered a proposal to create a Certified Financial Aid Administrator (CFAA) program. The CFAA was developed after two years of research and at the recommendation of the Certification Task Force, which is composed of NASFAA members. In March 2018, the Board voted to approve the CFAA program; in June the Board approved the request for funds to drive program development, marketing and promotions, staffing, and technology development/discovery. Funds will come out of Board reserves; the program is not being funded out of membership dues.
4. Given recent media reports about sexual harassment in the workplace, NASFAA consulted legal counsel to be sure expectations for appropriate behavior were clear and airtight for staff, volunteers, conference attendees, and others. In March, the Board voted to add updated language prohibiting harassment at NASFAA events to the "Board Policies and Procedures," the "Board of Directors' Handbook," and the "Committee & Task Force Handbook."
5. In spring and summer of 2018, the Board approved the concept of a Diversity Leadership Program (DLP) and then approved the funding to support the program's creation. The DLP aims to advance the careers of participants and provide them with important professional development; help NASFAA and the six regional associations develop a "deep bench" of talented, motivated leaders from diverse backgrounds; and provide individuals from underrepresented groups in the association community (e.g., people of color, lesbian/gay/bisexual/transgender/queer people, and people with disabilities) with support, access, and opportunities for leadership.





# the 2017-18 nasfaa board of directors

## officers

National Chair: Billie Jo Hamilton, University of South Florida  
 National Chair-Elect: Lori Vedder, University of Michigan-Flint  
 Past National Chair: Lisa Blazer, University of Texas at San Antonio  
 Treasurer: Brad Barnett, James Madison University

## regional representatives

EASFAA: Wynette Zuppari, Brown University  
 MASFAA: Susan Swisher, Saint Xavier University  
 RNASFAA: Vicki Kucera, Central Community College  
 SASFAA: Marian Dill, Lee University  
 SWASFAA: Denise Welch, Panola College  
 WASFAA: Mike Johnson, Columbia Gorge Community College

## representatives at large

Rachelle Feldman, University of North Carolina at Chapel Hill  
 Brenda Hicks, Southwestern College  
 Douglas Levy, Macomb Community College  
 Lisa Hopper, National Park College  
 Kim Jenerette, Cedarville University  
 Jacqueline Kennedy-Fletcher, Indiana University

## commission directors

Angela Johnson, Cuyahoga Community College District  
 Mary Sommers, University of Nebraska at Kearney  
 James White, Gonzaga University

## ex-officio

President: Justin Draeger, NASFAA  
 Board Executive Secretary: Beth Maglione, NASFAA  
 Chief Financial Officer: Mitchell Weintraub, NASFAA/Cordia Partners

## special advisor to the board

Diversity Officer: James Brooks, University of Oregon

6. The Board confirmed three key appointments to NASFAA Leadership:
  - Kay Lewis (University of Washington) as chair of NASFAA's Ethics Commission for three years of service starting July 1, 2018, and ending June 30, 2021.
  - Craig Slaughter (Kenyon College) as diversity officer for a two-year term of service starting July 1, 2018, and ending June 30, 2020.
  - Keith Williams (Michigan State University) as NASFAA treasurer and chair of the Financial Affairs Committee for two years of service starting July 1, 2019, and ending June 30, 2021. He will first serve as Financial Affairs Committee vice chair in 2018-19.
7. In June 2018, the Association Governance Committee brought two requests to the Board, which the Board subsequently approved: a motion to reduce the diversity officer's tenure from three to two years, and a motion to update some elements of the national chair's position description to reflect a requirement for prior Board service.
8. During the 2017-18 year, NASFAA's Board met with officials from the U.S. Department of Education (ED) and the U.S. Senate. The Board considered significant public policy topics throughout the year, including the following:
  - **One-time FAFSA.** The Board approved the acceptance of a Lumina Foundation grant to study this topic along with the Center for American Progress (CAP) and the Association of Community College Trustees (ACCT).
  - **The Higher Education Committee of 50.** NASFAA received a prestigious grant to engage the broader institutional voice in conversations about reforming access and success efforts. As part of this effort, 50 participants, selected from a broad array of university offices, have been divided into four subgroup topic areas—access, accountability, affordability, and transparency—to discuss innovative ideas. The committee released draft recommendations for public comment in September 2018, and the subgroups' work will continue through December 2018.
  - **Student Loan Discharge.** The Board reviewed and accepted the recommendations of a member task force on this topic.
  - **Re-Examining Paradigms of Campus-Based Aid.** The Board reviewed the recommendations of a member task force on this topic. The task force presented two models as options: the Portable Option (one grant, one loan, one work-study), and the Campus-Based Option (one grant, one loan, one campus-based). In accepting the recommendation, the Board did not express a preference for one model over the other.
  - **Cost of Attendance (COA).** A subgroup of the Board of Directors considered this issue and reviewed the recommendations contained in a report from the prior fiscal year. After offering some revisions, the Board accepted the recommendations as amended by this working group. The Board tasked the Ethics Commission with updating the Statement of Ethical Principles and tasked staff with revising, updating, and publishing the COA Monograph.
  - **Institutional Accountability.** The Board took no specific action, but the sense of the group was to maintain strict requirements for for-profit institutions. The Board also considered institutional accountability items in the PROSPER Act and discussed whether portions of the bill could be altered to make it more workable for institutions.
  - **Award Notifications and Code of Conduct.** In June 2018, the Board reaffirmed the standards for award notifications as laid out in the Code of Conduct and approved a statement supporting minimal standards on award letters in federal legislation.

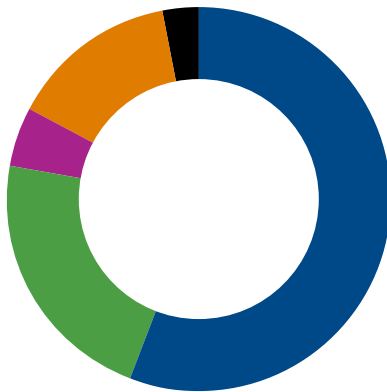
# finance

ensuring the most efficient and effective use of NASFAA's financial resources

NASFAA's Board of Directors and Financial Affairs Committee continue to work together to ensure the highest level of fiscal oversight. As incoming Treasurer Lianne Masterson reported to the membership at the Annual Business Meeting in Austin, TX, the Board annually approves and monitors a break-even budget—and for 2018-19, that budget included no dues increase. She also reported that for the seventh year in a row, NASFAA had a clean audit. Last fiscal year (July 1, 2017, to June 30, 2018), NASFAA devoted 77 percent of total expenditures to membership support, advocacy, communications/web

efforts, conferences, and trainings—and just 15 percent to administrative and general expenses. NASFAA spent an additional 8 percent on developing new programs. The 15 percent administrative outlay is up slightly from last year's 12 percent, but it is still low compared to FY16 (17 percent) and FY15 (19 percent). It is also considerably less than the nearly 26 percent average for "general and administrative expenses" cited for organizations of NASFAA's size by the American Society of Association Executives in its 2016 Operating Ratio Report.

## Revenue



|                       |                    |     |
|-----------------------|--------------------|-----|
| Membership Dues       | \$5,043,355        | 56% |
| Conference & Meetings | \$1,995,151        | 22% |
| Grants & Research     | \$449,622          | 5%  |
| Training & Programs   | \$1,233,490        | 14% |
| Publications          | \$8,227            | <1% |
| Advertising           | \$262,842          | 3%  |
| Other                 | \$1,200            | <1% |
| <b>Total Revenues</b> | <b>\$8,993,887</b> |     |

## Expenses



|                               |                    |     |
|-------------------------------|--------------------|-----|
| Membership Support            | \$1,228,003        | 14% |
| Advocacy                      | \$827,525          | 9%  |
| Administrative & General      | \$1,330,291        | 15% |
| Communications & Web Expenses | \$985,297          | 11% |
| Conference & Meetings         | \$1,547,273        | 18% |
| Training & Programs           | \$2,174,332        | 25% |
| New Program Development       | \$733,438          | 8%  |
| <b>Total Expenses</b>         | <b>\$8,826,159</b> |     |



# did they really just say that?!

by Lena Tenney, coordinator of public engagement, Kirwan Institute for the Study of Race and Ethnicity, The Ohio State University.

Pronouns: they/them/theirs

**Tenney presented on Implicit Bias to more than 100 attendees at NASFAA's June 2018 Austin Conference.**

Have you ever been in a conversation with a student or a colleague when they've suddenly said something biased that made you uncomfortable? How did you respond, if at all? Most of us struggle to address these all-too-common situations. We might feel shocked, confused, awkward, and/or horrified. We might ask ourselves if the person really just said what we thought they did or if we somehow imagined it, misheard, or are being overly sensitive. We might wonder whether it is appropriate for us to say something in response. We might even completely freeze until it's too late to speak up because the conversation has already moved along. Even though we want to do what is right and speak up for equality, we do not always know how to take action in that difficult moment—especially if we are not sure whether the person making the comment meant to cause harm.

These types of situations are all too common and have been on the rise in recent years,<sup>1</sup> as ever-present but now increasingly bold voices of bias, discrimination, and hate seek to further marginalize our students and colleagues through overt and covert bias. Even in this time of heightened urgency around questions regarding who belongs on our campuses<sup>2</sup> and what it means to create an equitable and just institution of higher education,<sup>3</sup> you are not alone in feeling at a loss for how to respond to these normalized, mundane manifestations of bias in addition to blatant instances of racism, sexism, homophobia, transphobia, ableism, xenophobia, etc.

As financial aid professionals, it is imperative to take action in these moments when bias manifests in order to create a welcoming, inclusive, and affirming environment for all people who enter our space and rely upon our expertise. Students should be able to expect a positive, culturally competent experience when they address financial aid concerns. Colleagues should be able to expect that they can bring their full selves to work and be treated respectfully by their peers. That is not possible if we allow bias to go unchecked, and if we meet microaggressions with a silence that often speaks loudly to others, telling them we are willing to be complicit in their dehumanization because it is too difficult for us to speak up.

But how do we actually speak up, much less in ways that are effective? What are our goals in speaking up, and how do we accomplish them? While certainly no single approach is guaranteed to work every time, when we decide ahead of time that we are committed to being an active bystander in moments when bias emerges through implicit bias<sup>4</sup> and microaggressions<sup>5</sup> we have already done some of the foundational work necessary to challenge everyday oppression. We can then proactively consider what strengths we already possess<sup>6</sup>—such as humor, direct communication, stating discomfort, asking questions, etc.—and utilize them to empower ourselves to speak up. We can tailor our approach based on the context of the situation at hand to create educational conversations in response to bias, rather than eliciting a defensive reaction from the person who has (perhaps unintentionally) caused harm. Even if we do not succeed in speaking up in the moment, we can have follow-up conversations that address the issue.

While these situations are often challenging and complex, we can commit to learning about and practicing being an active bystander so we are able to create inclusive financial aid offices. In the words of Audre Lorde: “When we speak, we are afraid our words will not be heard nor welcomed, but when we are silent, we are still afraid. So it is better to speak.”<sup>7</sup>

Creating inclusive financial aid offices goes beyond reacting to biased comments, however. We have the opportunity—indeed, the responsibility—to be proactive in shaping what kind of space we want our department to be for students and staff. Intentionally crafting inclusive spaces can even preempt manifestations of bias and thereby reduce the frequency with which we are called on to be an active bystander. To do this, we must examine our society, institutions, policies, procedures, and practices to identify where inequity has been built into the system itself.

How can we do this challenging yet necessary work in practical ways that make an everyday difference for our students and colleagues? We can learn about implicit biases<sup>8</sup> and work to mitigate our own biases. We can educate ourselves about using inclusive language.<sup>9</sup> We can update our standard forms to be more inclusive by incorporating the opportunity to provide a preferred name and expecting staff to use preferred names instead of legal names; including the opportunity to provide pronouns<sup>10</sup> and expecting staff to use those pronouns instead of assuming students’ gender; utilizing up-to-date, expansive options for demographic self-disclosure when we need such information; and having forms available in multiple languages.

We can seek to make our buildings not only compliant with the Americans with Disabilities Act (ADA), but truly accessible. We can request the implementation of gender-inclusive restroom options, as well as changing stations in all restrooms regardless of how they are gendered. We can evaluate our current office decorations to determine if students of all identities can see themselves represented in the space. We can examine whether our hiring, retention, and promotion practices are truly equitable and then implement best practices to create more just employment pipelines.<sup>11</sup>

We can use student satisfaction surveys to identify gaps in service, including any disparities in student experience that may be related to identities. We can listen to students and colleagues when they speak up about their experiences, and then we can work to make amends for any harm that has been done, whether accidentally or intentionally. We can commit to continually learn about issues of diversity, inclusion, equity, and justice while putting that theory into everyday practice.

When we do our most inclusive work, we are doing not only good work but our very best work. When we embrace the opportunity to create inclusive spaces—by not only empowering ourselves to respond to the, “Did they really just say that?!” moments but also to strategize proactively around making our financial aid offices truly affirming for all students and colleagues—we are doing our very best work. And that is precisely why we do financial aid work in the first place: to make a real difference, one person at a time.



## Read More, Learn More

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- <sup>9</sup> Higher Ed Student Affairs Live. (2017, September 13). *Implicit bias and inclusive language*. [Video, panel discussion]. Retrieved from <http://higheredlive.com/implicit-bias-and-inclusive-language/>
- <sup>10</sup> GLSEN. (n.d.). *Pronouns: A resource. Supporting transgender and gender nonconforming (GNC) educators and students*. Retrieved from <https://www.glsen.org/sites/default/files/GLSEN%20Pronouns%20Resource.pdf>
- <sup>11</sup> Jackson, V.W. (2018, April 30). *Combating implicit bias in the workplace. Institutional interventions to prevent implicit bias from undermining organizational diversity*. Retrieved from <http://kirwaninstitute.osu.edu/wp-content/uploads/2018/04/Combating-Implicit-Bias-in-the-workplace.pdf>



# advocacy

Helping policymakers understand the complexity of financial aid programs and how they impact students and institutions

NASFAA's advocacy efforts emphasize increasing access to and completion of higher education; simplifying the student aid process; minimizing student indebtedness; and promoting need-based aid. Through proactive and reactive advocacy, with critical assistance from members, NASFAA maintains strong relationships with policymakers in Congress and the U.S. Department of Education (ED), offering policy proposals, feedback, and technical assistance to modernize and strengthen the federal student aid programs.

This year, NASFAA staff provided testimony in several hearings; engaged in key policy meetings; researched and published recommendations, white papers, fact sheets, and issue briefs; and continued promoting Hill visits through the Advocacy Pipeline initiative.

## **Senate Committee Hearing on Reauthorizing the Higher Education Act: Examining Proposals to Simplify the Free Application for Federal Student Aid (FAFSA)**

NASFAA President Justin Draeger testified before the Senate Health, Education, Labor, and Pensions (HELP) Committee on November 28, 2017. Draeger's testimony focused on balancing the seemingly competing priorities of accuracy and simplicity. He explained NASFAA's three-pathway FAFSA simplification proposal, a result of the 2015 NASFAA FAFSA Working Group, which proposes leveraging already-held federal government tax data and means-tested benefit recipient information to create an accurate and simple federal student aid application process.

## **Public Hearing on Gainful Employment and Borrower Defense to Repayment Regulations**

NASFAA Vice President Megan Coval testified at ED's public hearing on rewriting the borrower defense to repayment and gainful employment regulations on July 10, 2017. On gainful employment, Coval noted the significant administrative challenges experienced during implementation of the original regulation. She encouraged ED to provide sufficient implementation time with adequate testing in any new regulatory activity in gainful employment to avoid the problems that occurred during the last rollout.

## **Public Hearing on Regulatory Reform**

NASFAA Director of Policy Analysis Karen McCarthy testified at ED's public hearing on regulatory reform on October 4, 2017. In testimony based on comments from NASFAA members, McCarthy described three regulatory areas that financial aid administrators find particularly frustrating: return of Title IV funds (R2T4), subsidized usage limits (SULA), and verification. She testified that rules that create barriers to aid application, enrollment, and completion, or that inhibit innovation by institutions, are as problematic as those that inhibit job creation.



## NASFAA Advocacy Pipeline

NASFAA's ongoing Advocacy Pipeline initiative, now in its sixth year, brought 23 NASFAA members to Capitol Hill in 2017-18 to provide policymakers with the unique perspectives of financial aid administrators. Reflecting NASFAA's nonpartisan policy agenda, NASFAA members met with representatives and staff in more than 45 different congressional offices—23 Republican and 22 Democrat—to discuss HEA reauthorization priorities and the importance of sustained investment in student aid. As in prior years, NASFAA focused one Advocacy Pipeline visit on graduate and professional student issues, with five graduate and professional program aid administrators participating in 13 meetings with key congressional members and staff. More information about the Advocacy Pipeline appears at [https://www.nasfaa.org/Advocacy\\_Pipeline](https://www.nasfaa.org/Advocacy_Pipeline).

## Graduate and Professional Loan Limits Task Force White Paper

Graduate and professional students make up a relatively small proportion of the total student population, yet they hold a disproportionate share of outstanding student loan debt. Much of the focus of the federal student aid programs, as reflected in policy, Federal Student Aid resources, media attention, and public opinion, skews primarily toward undergraduate students. With a reauthorization of the Higher Education Act looming, NASFAA convened the Graduate and Professional Loan Limits Task Force to make recommendations that would ensure that graduate and professional students' needs are adequately considered in upcoming legislation. A white paper describing these recommendations appears at [https://www.nasfaa.org/gp\\_loan\\_limits](https://www.nasfaa.org/gp_loan_limits).

## Re-Examining Paradigms of Campus-Based Aid

Responding to growing interest in a "one grant, one loan" model for federal student aid, NASFAA's Re-Examining Paradigms of Campus-based Aid Task Force developed and recently released a report describing two models for preserving the campus-based aid programs in a one grant, one loan environment. The report appears at [https://www.nasfaa.org/campus-based\\_aid\\_report](https://www.nasfaa.org/campus-based_aid_report).

## Designing Regulations to Protect Federal Student Loan Borrowers: Closed School Discharge

In November 2017, with support from the Lumina Foundation, NASFAA examined existing and proposed provisions for closed school discharge from the perspectives of equity and efficiency. This examination resulted in seven recommendations underscoring the importance of policies that balance the interests of students, institutions, and taxpayers in the event of school closings. The report appears at [https://www.nasfaa.org/uploads/documents/Designing\\_Regulations\\_to\\_Protect\\_Fed\\_Student\\_Loan\\_Borrowers.pdf](https://www.nasfaa.org/uploads/documents/Designing_Regulations_to_Protect_Fed_Student_Loan_Borrowers.pdf).

## Key Meetings on Student Aid Policy Issues

NASFAA staff met with leaders and staff from the following government organizations and committees in 2017-18:

- U.S. Department of Education
- U.S. Office of Management and Budget
- U.S. Government Accountability Office
- White House Domestic Policy Council
- Congressional Budget Office
- House Committee on Education and the Workforce
- Senate Committee on Health, Education, Labor, and Pensions
- Senate and House Labor, Health and Human Services, Education, and Related Agencies Appropriations Subcommittees
- House and Senate Budget Committees
- House Committee on Oversight and Government Reform

## Advocacy Resources Online

Throughout 2017-18, NASFAA unveiled a variety of one-pagers, issue briefs, and fact sheets to assist NASFAA members in their own advocacy on and understanding of key federal student aid issues. Further, NASFAA launched a new issue brief series, available at [https://www.nasfaa.org/nasfaa\\_issue\\_briefs](https://www.nasfaa.org/nasfaa_issue_briefs). These briefs cover topics ranging from origination fees to Public Service Loan Forgiveness to a brief on the administrative cost allowance that features results of a survey of NASFAA members. Three issue briefs are part of the NASFAA website's Advocacy Resources area ([https://www.nasfaa.org/Advocacy\\_Issue\\_One\\_Pagers](https://www.nasfaa.org/Advocacy_Issue_One_Pagers)), which includes a wide variety of resources developed to support NASFAA members' advocacy efforts. Expect more issue briefs in the coming year on topics like verification and award notifications.

# just keep swimming!

## making your mental health a priority

by Philip Hawkins, director of financial aid, The George Washington University Law School

Financial Aid Director Philip Hawkins presented a session on mental health at NASFAA's National Conference in June 2018. In this highly personal account of his battles with stress and depression, he offers insights on "learning to breathe."

Several years ago, I took up swimming as a serious form of exercise. Learning how to swim for exercise taught me how little I knew about the favorite summer pastime of swimming. Learning how to swim correctly also taught me many basic life lessons. One very basic but essential lesson was to learn how to breathe while swimming. When I was young, I was told "don't breathe underwater!" which meant that I usually held my breath for as long as I could. Competitive swimmers can't do it that way; they must actually learn how to breathe while swimming, which means to inhale by turning their bodies so their mouths come out of the water ever so slightly for air at regular intervals, then to exhale through the water. Inhale and exhale, stroke and kick, all in smooth, fluid, repetitive motion. The basic lesson learned from this—breathe!! Breathing is foundational to living! After months of improving the art of basic swimming in a pool, I plunged into lake swimming, where there is no wall every 25 yards to take a break, and I found myself underwater singing Dory's song to Marlin from the Disney animated film *Finding Nemo*: "Just keep swimming! Just keep swimming!"

Sometimes life sneaks up on us and we forget to breathe—to turn away ever so slightly and take that slightest break from what surrounds us—so we can inhale and exhale that slightest bit of foundation-of-life breath to take us through the next set of responsibilities we must face, the next set of work priorities we must complete, the next set of family commitments we must fulfill. You see, without breath, we deprive our bodies of oxygen. Without oxygen, our bodies lose their ability to sustain life—we lose our ability to live.



# Take a Breath:

## Proactive Stress Management

Feel like you can't escape the cycle of stress you're in? Try some of these suggestions.

- Maintain a defined workweek (stop early/late days, working weekends, etc.)
- Take allocated vacation and sick time
- Take lunch break away from your desk
- Eat healthy and exercise
- Talk with a friend—really talk rather than texting or Facebook
- Seek assistance from a counselor or therapist
- Practice self-compassion
- Remember the movie “Frozen” and learn to “Let It Go!”
- Take one thing at a time, one day at a time
- Be selfish! Focus on yourself first (as airlines advise—put on your own oxygen mask before helping others)
- Laugh! Smile!
- Accept the love and support that others offer
- Accept yourself
- Find ways not to feel lonely, even when you may actually be alone
- Try journaling your feelings and identify feeling words
- Eliminate the word “failure” from your vocabulary
- End the day recalling successes/positives

Working in financial aid can be very rewarding—we help students find funding opportunities to pursue their next level of education. Often, the rewards can be overshadowed by the administrative burdens—compliance, deadlines, enrollment pressures, accreditation, adequate staffing levels, training—and it seems the list grows every year. Without that necessary breath, we often lose sight of the rewards; worse, we often lose ourselves.

In 2012, I began having symptoms of depression masked as anxiety/panic attacks. The symptoms progressed to a point where I was scared to drive anywhere, and I ultimately became scared to leave my house. Eventually, through the help of counseling and medication, I convinced myself that I was well enough to take on a new job at a new school. I poured more of myself than I could spare into that job, spending countless hours, early mornings, nights, and weekends working and never feeling caught up. Looking back, though, I had always followed that pattern in any job I ever held. “This is my normal,” I convinced myself. Using my metaphor, I wasn’t breathing. This wasn’t normal, and it was only getting worse.

By July 2015, I faced four staff vacancies that left the office down by 33 percent, an upcoming payment deadline with hundreds of students facing unresolved payment issues, and two missed federal gainful employment data reporting deadlines and subsequent notifications of my delinquency to my university president. I spent six consecutive weeks working seven 14-hour days, and all I could see in myself when I looked in the mirror was the word “FAILURE.” Finally, on the afternoon of September 1, 2015, with a crowded lobby of students and parents, my associate director came to my office to ask a very routine question that should have required only a routine response from me. Instead, all I could tell her was, “I don’t know. I don’t know. I don’t know! . . .” until I was crying and screaming at the same time. I was experiencing a mental breakdown. On this occasion as well as another just nine months later, I came face-to-face with this reality:

I was suicidal.

After two mental health crisis hospitalizations that year, I took a medical leave and entered a long-term recovery program in the summer of 2016. I continued under their care even after I returned to full-time work in the fall, becoming a sojourner with others who had similar stories and who had reached their own encounter with life’s dark realities.

The online *Book of Life*, by the London-based “School of Life,” includes the chapter “Self: Virtues of Character” where they discuss “the importance of having a breakdown.” Within this discussion, which sounds so very similar to many of my personal experiences, they suggest the following:

The reason we break down is that we have not, over years, flexed very much. There were things we needed to hear inside our minds that we deftly put to one side, there were messages we needed to heed, bits of emotional learning and communicating we didn’t do—and now, after being patient for so long, far too long, the emotional self is attempting to make itself heard in the only way it now knows how. It has become entirely desperate—and we should understand and even sympathise with its mute rage. What the breakdown is telling us above anything else is that it must no longer be business as usual—that things have to change.

(*Book of Life*, <https://www.theschooloflife.com/thebookoflife/the-importance-of-having-a-breakdown/>).

Flex? Change? In the financial aid profession? I mean, aren't we a profession grounded in laws, regulations, and accountability? Flexibility gets us into trouble, right? If we think of the School of Life's perspective regarding the capacity to "flex" solely within our professional context, we miss the point. "Things have to change..." brings the human piece of ourselves into our professional context. We can only do so much in our lives without taking a breath to keep going. Otherwise, without that breath, we stop moving forward in the water.

We stop moving.

We...stop.

So, how do we take that momentary breath while still moving forward in our high-pressure profession, as swimmers do? I recently presented on "Mental Health in the Financial Aid Profession" at three conferences, including the 2018 NASFAA Conference. Each time, I asked for very informal feedback from the audience regarding the use of vacation time and lunch breaks. Although there were only 60 respondents across the three events, their responses were revealing. Forty-six percent indicated they take an annual loss on their vacation time to some level, 30 percent indicated the financial aid calendar makes it impossible to take all their vacation time, and 4 percent indicated they have no idea how many vacation days their employer allocates to them and how many they have taken. Regarding lunch habits, only 13 percent of the respondents indicated that they routinely leave their desk for a lunch break every day; 19 percent indicated they routinely skip lunch entirely. The middle ground (65%) indicated they combo work/eat at their desk during lunch on a regular basis.

Vacation time and lunch breaks are just two examples of a limited resource we already own that can help us take that much needed metaphorical breath—our TIME!

Sometimes that metaphorical breath we need to keep moving forward comes in other reminders that we are persons who have value and worth. Practice self-compassion, especially during the difficult times. Engage in positive self-talk, even out loud. Hearing it reinforces it. Don't stuff your feelings; talk them out with a friend or journal them. Use your phone to talk with a friend; don't just rely on texting or social media. Spoken words and listening are quickly becoming a forgotten art of communication. When needed, seek help from a professional listener.

I continue to learn many valuable lessons on my recovery journey, most notably that each day is brand new, and no matter how much I plan, it takes resilience to maintain enough personal flexibility so I do not break (again) during the stressful times. By managing the opportunities to turn and take my breath and to exhale that breath as I move forward in life's waters, I choose to accept myself as a successful person who has worth and value.



# Find Help When You Need It

**National Suicide Hotline**  
**1-800-273-8255 (TALK)**

**National Alliance on Mental Illness**  
**<https://www.nami.org>**

# research & grants

Increasing our understanding of financial aid issues to improve advocacy, assist members, and support informed legislation and policy

NASFAA's research and grant initiatives strengthen the association's advocacy, membership, and strategic long-range plan efforts. This year's research focused on supporting our task forces in forming their recommendations and evaluating their work, as well as assisting our federal relations team in examining federal datasets to further our advocacy efforts. We also continued to collaborate with outside organizations and expand on areas explored in previous work, such as loan counseling and origination fees. In addition, we increased our grant work, continuing our efforts with displaced students and forming the Higher Education Committee of 50. Finally, we published three issues of *Journal of Student Financial Aid*, including an innovative special issue on research/practitioner partnerships.

## Surveys

NASFAA surveys take the pulse of our members and others on key financial aid and higher education issues like prior-prior year, verification, technology, and student debt. The results of these surveys aided initiatives both within and outside the association.

### Surveys That Support NASFAA's Advocacy, Research, or Membership Efforts

- **Administrative Cost Allowance Survey**, July 2017
- **Today's News Readership and Redesign Survey**, October 2017

### Surveys Performed on Behalf of or in Collaboration With External Groups

- **Annual Institutional Loan Survey** (July 2017), in partnership with The College Board. The College Board uses results from this survey to calculate institutional loan amounts shown throughout their *Trends in Student Aid* report each year (<https://trends.collegeboard.org>). They will publish the next report in fall 2018.



## Research Reports

NASFAA released the following research reports between July 1, 2017, and June 30, 2018.

**PPY Task Force Implementation Survey Results** (July 2017), available at [https://www.nasfaa.org/uploads/documents/PPY\\_Task\\_Force\\_Implementation\\_Survey\\_Results.pdf](https://www.nasfaa.org/uploads/documents/PPY_Task_Force_Implementation_Survey_Results.pdf).

**Administrative Cost Allowance Survey Results** (September 2017), available at [https://www.nasfaa.org/uploads/documents/2017\\_ACA\\_Results.pdf](https://www.nasfaa.org/uploads/documents/2017_ACA_Results.pdf).

**2018 NASFAA National Student Aid Profile** (July 2017), available at <https://www.nasfaa.org/profile>.

## Collaborations

NASFAA collaborated with multiple groups and associations during 2017-18 to work on several important federal student aid issues.

- **Council for the Advancement of Standards in Higher Education (CAS) Professional Standards for Higher Education.** NASFAA continued to serve on the CAS Board, providing feedback on standards for various postsecondary program areas.
- **LendEDU:** LendEDU and NASFAA collaborated on the report *Do Student Loan Borrowers Understand Loan Fees?* to examine students' understanding of origination fees (<https://lendedu.com/blog/do-student-loan-borrowers-understand-loan-fees/>).

- **Trellis Company:** Trellis collaborated with NASFAA and the Board of Governors of the Federal Reserve System on the first in-depth survey of financial aid administrators' experience with student loan counseling. This report, *Engaging Student Borrowers: Results of a Survey of Financial Aid Professionals*, examined how schools deliver the required counseling that accompanies federal student loans (<https://www.trelliscompany.org/portfolio-items/engaging-student-borrowers-results-survey-financial-aid-professionals/>).

## Grant-Funded Projects

- **Grant to Help Support Students Displaced by Sudden Institutional Closure** (funded by Lumina Foundation, January 2017 - December 2018). This year, NASFAA continued to assist students displaced by institutional closures via the NextStepsEd.org website, where students submit requests for help with issues related to closed-school federal loan discharge, borrower defense, and Federal Pell Grant restoration. Since the inception of this project, we have assisted more than 5,000 students. In November 2017, NASFAA published a paper, *Designing Regulations to Protect Federal Student Loan Borrowers: Closed School Discharge*, offering seven policy recommendations to Congress on existing and proposed provisions for closed school discharge ([https://www.nasfaa.org/uploads/documents/Designing\\_Regulations\\_to\\_Protect\\_Fed\\_Student\\_Loan\\_Borrowers.pdf](https://www.nasfaa.org/uploads/documents/Designing_Regulations_to_Protect_Fed_Student_Loan_Borrowers.pdf)).

The Center for Association Leadership honored NASFAA with its "Power of A Silver Award" in the "Power to Enrich Lives" category for its assisting displaced students project. Before the end of this grant, NASFAA will publish a knowledge base website and produce a "lessons learned" paper to be shared with the Office of Federal Student Aid.

- **Center for American Progress (CAP), American Community College Trustees (ACCT), and NASFAA** will analyze the potential effects of a one-time FAFSA. CAP will analyze data collected by NASFAA to identify the extent to which incomes vary over time, which types of students could benefit from a one-time FAFSA, and where the policy may be less effective. The results are expected to be published in late 2018.

- **The Higher Education Committee of 50:** This project brings together institutional leaders who view reauthorization as a time to foster change and improvement for their students. This initiative provides a forum for these leaders to be bold and forward thinking in a free discussion of thought-provoking, innovative ideas. Read more about this project on page 22.

## Journal of Student Financial Aid

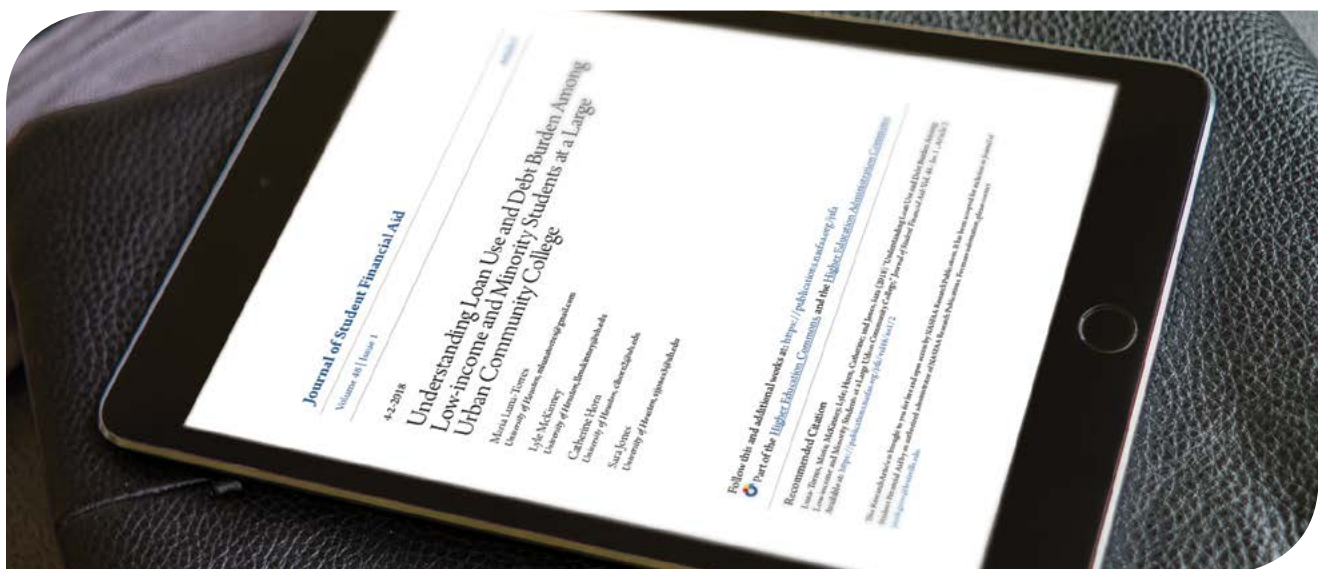
Over its nearly 50-year history, *Journal of Student Financial Aid* has remained a trusted source for the latest in peer-reviewed scholarly research on student aid-related issues. From July 1, 2017, through June 30, 2018, readers in 168 different countries downloaded the *Journal* a total of 46,650 times—6,650 more downloads than in the prior fiscal year.

Monthly readership jumped to nearly 6,400 in November 2017, when researcher and practitioner collaborations took center stage in a special issue of the *Journal*. In this special issue, four research teams, each composed of at least one researcher and one financial aid practitioner, produced research articles reflecting their unique perspectives. The issue also featured four additional essays on diverse aspects of the researcher/practitioner partnership. Guest editors Justin Chase-Brown (director of scholarships and financial aid at University of Nebraska-Lincoln) and Rajeev Darolia (assistant professor of public affairs and education at the University of Missouri) contributed the introduction and conclusion to the issue.

Two regular *Journal* issues rounded out the year, with articles on topics ranging from debt burden; gap-funded programs; low-income student enrollment; need-based institutional aid; affordability; employer-sponsored aid; improving aid delivery; and certification of aid administrators. Full downloads of all archived issues of the *Journal* are available at <https://publications.nasfaa.org/jsfa/>

| Top Five Downloaded Journal Articles in 2017-18*   | Total 2017-18 Downloads |
|--|-------------------------|
| "A History of Financial Aid to Students," by Matthew B. Fuller   | 5,647                   |
| "Student Loans, Financial Stress, and College Student Retention," by Sonya L. Britt, David Allen Ammerman, Sarah F. Barrett, and Scott Jones | 2,762                   |
| "Borrowing and Repaying Student Loans," by Nicholas Hillman  | 2,082                   |
| "Money Management Knowledge of College Students," by Sharon M. Danes and Tahira K. Hira  | 2,081                   |
| "Debt and College Students' Life Transitions: The Effect of Educational Debt on Career Choice in America," by Yeseul Choi                    | 2,063                   |

\*Note: Some articles are assigned to students as part of postsecondary coursework, increasing the number of downloads.



# Innovative College Leaders Working Toward Change

by Charlotte Etier, assistant director of research development & grants

In November 2017, NASFAA received a significant grant to convene a group of 50 forward-thinking campus leaders to develop policy solutions that will help surmount obstacles preventing students from enrolling, paying for, and graduating from college. Announcing this new effort, NASFAA President Justin Draeger said, "Our goal is to include forward-thinking individuals representing various levels of an institution to tackle some of the most complex and pressing issues that face higher education." He continued, "Everyone on campus has an interest in student success and affordability, and we're confident that this group will put forward the types of logical and transformative ideas that are needed to tackle these issues."

In late 2017, NASFAA employed a rigorous application process to select 50 individuals to form the Higher Education Committee of 50. The committee members are committed to finding innovative policy solutions in four areas: access, accountability, affordability, and transparency. Members of the committee represent 19 different offices on college campuses and include presidents, enrollment managers, students, and leaders from admissions, financial aid, and bursars' offices.

The primary activities of the committee are to

- Identify emerging policy issues that impact students and the higher education landscape, with a specific focus on access, affordability, transparency, and accountability;
- Create practical solutions and recommendations for members of Congress, which will be available to the broader policy community for review and comment prior to finalization;
- Coalesce around the approved recommendations and present a united front when speaking about them publicly; and
- Elevate the principles and positions put forward by the the committee after the grant has ended.

To kick off their work, the committee members met in Washington, D.C., for two days in March 2018. On the first day, they attended four panel discussions—one on each of the four pre-identified topic areas—where subject matter experts described background information and existing policy recommendations. At the end of the day, committee members chose which of the four topic areas they would like to work on for the remainder of the project. On the second day, they engaged in intensive, in-person working sessions in their subgroups, designed to set the stage for the coming work.





Subgroup discussions were free-flowing and lively. Assigned to the topic of Affordability, David Sheridan (director of financial aid for Columbia University School of International and Public Affairs) wrote this in the committee's first blog:

**Exercises in which we envisioned future higher ed headlines that addressed progress in affordability generated a lot of lively discussion and great ideas. ...That was followed by a free-form flow of ideas on Post-It® notes that we used to cover the wall in broad categories that fed our themes. An exercise to create a definition of affordability morphed into something much longer than a simple dictionary-style definition, so we have started calling the document 'guiding principles.'**

After the March convening, committee members spent the spring and summer months talking, brainstorming, reviewing current regulations and recommendations, and crafting recommendations surrounding their assigned topic—no small challenge. Assigned the topic of Transparency, committee member Anne Kress (president of Monroe Community College) wrote in her blog post:

**The issue today is not a shortage of processes or a dearth of data; we are drowning in both. The [committee] is dedicated to cutting through the jargon and inside lingo, the tables and spreadsheets, the forms and paperwork. We want to put the data that decision makers need in their hands when they need it, communicated in ways that they understand and that drive action.**

The group put forth their preliminary recommendations for public comment in September 2018. Committee members understand that all offices across campus will need to support their recommendations, which can prove challenging. But, as committee member Caleb Cornelius (senior associate vice president of student financial services for Broward College), assigned to the topic of Affordability, wrote in his blog post, "The last thing we want to do is provide recommendations that won't move the needle."

The group's recommendations will be released to the public in spring 2019.



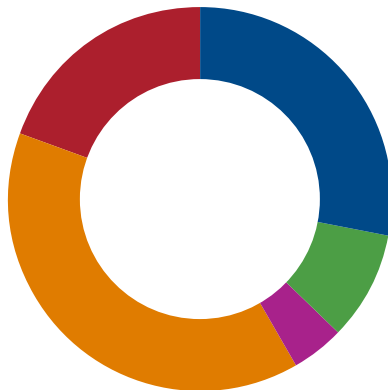
# membership

serving those who help students and families to achieve their higher education goals

NASFAA's member retention rate has held steady above industry averages for more than a decade. This year, the association once again retained 95 percent of its members, compared to a low of 94.6 percent in 2009-10 and a high of 97.7 percent in 2008-09. However, overall membership numbers continue to decline by relatively small percentages each year, primarily due to institutional budget constraints and school closings or mergers. In 2017-18, we experienced a 1.4 percent decrease in membership (39 total institutions). To address these decreases, NASFAA

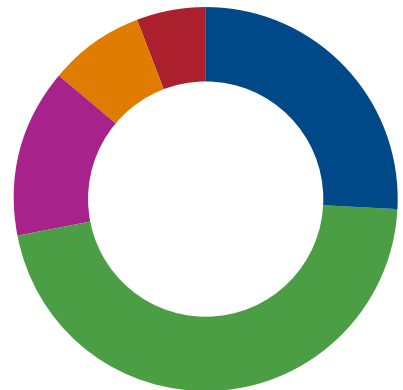
used an outside marketing firm to help recruit former members back into the association. In addition, for the third year in a row, NASFAA's Board held dues steady in 2017-18 to encourage new memberships and renewals. Since many of our institutional members have upgraded their membership packages to utilize add-on benefits, NASFAA continues to exceed its membership budget projections.

NASFAA Institutional Members by Sector



| Sector                | # of Schools | % of Member Institutions |
|-----------------------|--------------|--------------------------|
| Community Colleges    | 760          | 28.3%                    |
| For-Profit            | 244          | 9.1%                     |
| Graduate/Professional | 119          | 4.4%                     |
| Nonprofit             | 1,044        | 38.8%                    |
| Public 4-Year         | 522          | 19.4%                    |
| <b>Total</b>          | <b>2,689</b> |                          |

NASFAA Institutional Members by Institution Size



| Institution Size | # of Schools | % of Member Institutions |
|------------------|--------------|--------------------------|
| 0-999            | 701          | 26.1%                    |
| 1,000-4,999      | 1,237        | 46.0%                    |
| 5,000-9,999      | 380          | 14.1%                    |
| 10,000-19,999    | 221          | 8.2%                     |
| 20,000 and above | 150          | 5.6%                     |
| <b>Total</b>     | <b>2,689</b> |                          |

# movers & shakers

NASFAA members are always moving ahead, whether enhancing their skills in their current roles, accepting promotions or job changes, or discovering new pathways as retirees. Here are a few colleagues who made changes in their professional lives in 2017-18.

## Job Changes & Promotions



*Krissy Bhaumik*

**Brigitte Baker** is now director of financial aid and scholarships for Everett Community College. She has worked in financial aid for 15 years and previously served as assistant director of financial aid at Cascadia College.

**Anna Bartolini-Brown** is now Community College of Allegheny County's financial aid specialist, central. She has worked in student aid for six years and previously served as director of financial aid for Rosedale Technical College.

Washington & Jefferson College promoted **Charlene Bedillion** from associate director to director of financial aid. She has served in student aid for 16 years.

**Krissy Bhaumik** has been promoted to associate director for financial wellness & advising for University of Michigan from her prior role as assistant director. She has served in student aid for 12 years.

**Kathy Bialk**, former director of student financial assistance at Marshall University, is now assistant provost/director of student financial aid at the University of Iowa. She has worked in the field of financial aid for 33 years.

Formerly associate director of financial aid at Austin Community College, **Jason Briseno** is now executive director of student assistance and veterans affairs. He has worked in student aid for 18 years.



*Kathy Bialk*



*Jason Briseno*



*Branda Brown*



Mary Frances Causey

Trident Technical College promoted **Nicole Brownlow** from compliance and default management coordinator to associate director of financial aid. Nicole has 14 years of experience in the student aid field.

**Christopher Cartmill** is now director of financial aid at St. Bonaventure University. He previously served as deputy director of financial aid at Cornell University. He has worked in student aid for 17 years.

**Mary Frances Causey** is now associate dean of institutional research and compliance at Prescott College, where she writes that she will be “continuing in higher education by pursuing her love of order, structure and good, clean data, heading up the college’s new IR Department and preparing for our upcoming reaffirmation of accreditation.” She previously served as associate dean of enrollment services & director of financial aid. She has worked in student aid for 19 years.

**Raymond Ceo** is now director of financial aid for Yavapai College. Raymond has 40 years of experience in student aid and previously served as a consultant for Financial Aid Services, Inc.

**Jennifer Cooper** has been promoted to director of financial aid from her previous role as associate director. She has worked in student aid for 26 years.

**Darcey Cospser**, former coordinator of financial aid for University of West Florida, is now associate director of financial aid for Pensacola State College. Darcey has worked in student aid for five years.

**Lisa Cummings** is now associate director of student financial services at Saint Michael’s College. She previously held the role of director of financial aid for Johnson State College. Lisa has worked in student aid for 30 years.

**Anthony Dickman** is now coordinator of financial aid at the Ohio State University-Lima Campus. He previously served as coordinator of financial aid for Rhodes State College and has worked in student financial aid for nine years.

Syracuse University promoted **Maximo Flint Morgan** to associate director of financial aid & scholarship programs from his previous role as assistant director of undergraduate scholarships. He has 10 years of experience in the student aid field.

University of Michigan promoted **Sondra Fonville**, former assistant director for scholarships, to the position of associate director of strategic initiatives and partnerships. She has served in the student financial aid field for 20 years.

**Jill Gable**, former director of financial aid & scholarships for Elizabeth City State University, is now director of student financial aid for Rush University. Jill has worked in student aid for 10 years.

The University of Missouri-Columbia promoted **Keri Gilbert** from financial aid advisor to senior assistant director of student financial aid. She has three years of experience in student aid.

**Michelle Gonzalez** is now assistant director of financial aid and scholarships for Florida Gulf Coast University. She formerly served as associate director of advising and customer service at University of Buffalo, and she has worked in financial aid for 12 years.



Jennifer Cooper



Cindy Deffenbaugh



Sandra Fonville



Keri Gilbert



Lisa Cummings



Maximo Flint Morgan



Jill Gable



Michelle Gonzalez

Ocean County College promoted **Robbin Haynes** to assistant director of financial aid from her prior role as student loan administrator. She has 27 years of experience in the student aid profession.

**Heidi Hunter Goldsworthy**, who has served in financial aid for 37 years, is now deputy director in the office of scholarships and student aid at University of North Carolina at Chapel Hill. Heidi previously served as director of financial aid at University of Mary Washington.

Rocky Mountain University of Health Professions promoted **Alex Jackson** from the role of financial aid advisor to senior financial aid advisor. Alex has served in the financial aid profession for five years.

**Jayne Jarrett** has been promoted to assistant director of financial aid for Ohio Northern University from her former role as financial aid counselor. She has served in student aid for eight years.

Bryn Athyn College promoted **Brian Keister** from director of financial aid to assistant vice president of financial aid and enrollment management.

**Amber Kellogg** is now compliance counselor for California State University Fullerton. She previously worked for American Career College and Charter College. Amber has served in student aid for 10 years.

University of Louisville promoted **Natalie Legleiter** to financial aid advisor - senior from her prior role as financial aid advisor. She has worked in student aid for two years.

**Lisa Lilley** is now executive director of student financial services at Northwest-Shoals Community College. She has been in the field for 25 years and previously served as assistant director of financial aid at Trenholm State Community College.

Pratt Community College promoted **Haley Lindsey** from assistant director of financial aid to director of financial aid at Pratt Community College. She has served in student aid for five years.

**Colleen Long** is now scholarship coordinator for State University of New York College at Buffalo. She has served in the field for 10 years and previously worked as financial aid advisor at University at Buffalo.

**Tony Lubbers**, former director of financial aid for Friends University, is now director of student financial assistance at University of Central Missouri. He has served in the financial aid profession for 22 years.

University of Illinois at Urbana-Champaign promoted **Dan Mann** to associate provost of enrollment management from his prior position as director of student financial aid. He served as 2015-16 NASFAA chair and has worked in the student aid field for 38 years.

Pima Medical Institute promoted **Amie McKenney** to corporate financial trainer from cash management assistant. Amie has worked in financial aid for 10 years.

**Quinton Morgan**, former financial aid analyst for University of Arkansas at Monticello, has been promoted to assistant director of financial aid. Quinton has served in student aid for 10 years.



Robbin Haynes



Alex Jackson



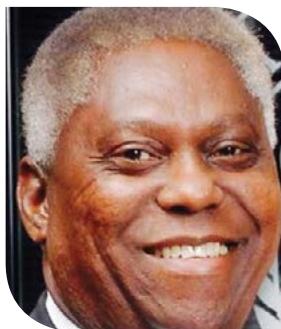
Jayne Jarrett



Ashley Jost



Heidi Hunter Goldsworthy



Governor Jackson



Ronald W. Johnson



Amber Kellogg

Iowa Western Community College promoted **Lisa Morrison** from financial aid specialist to director of financial aid. She has worked in financial aid for 11 years.

**Kelly Morrissey** is now director of financial aid for Community College of Rhode Island. She previously served as director of financial aid for Mount Wachusett Community College and has worked in the field of student aid for 30 years.

**Christopher Natelborg** is now assistant manager of financial aid for Mt. Hood Community College. He previously served as assistant director of financial aid at Warner Pacific University. He has worked in student aid for eight years.

With 35 years of student aid experience, **Elaine Nowak**, former director of product management & development for University of Michigan-Ann Arbor, is now director of project strategy for Workday, Inc.

Michigan State University promoted **Chandra Owen** to assistant director of financial aid from training coordinator at Michigan State University. Chandra has served in financial aid for 12 years.

**Thomas Ratliff** is now director of student financial services for Abilene Christian University, where he will guide the work of both the financial aid and student accounts offices. With 30 years of experience in student aid, Thomas previously served as associate vice president for financial aid and university compliance at Indiana Wesleyan University.

Ashland University promoted **Krystal Reynolds** to assistant director of financial aid from her previous position as financial aid counselor. She has two years of experience in the student aid field.

**Kathy Rapienski**, former financial aid systems analyst at University of Wisconsin-Stout, is now financial aid systems analyst at University of Wisconsin-Eau Claire. She has served in financial aid for 10 years.

**Michael Ruggless** is now assistant director, university financial aid compliance at Johns Hopkins University. He formerly held the position of quality assurance specialist at Saint Louis University and has worked in student aid for six years.

**Paul Schmidt** is now director of financial aid for College of Lake County. He formerly served as electronic reconciliation representative for College of DuPage and has worked in student aid for 24 years.

**Rebecca Schreiber-Reis** is now director of admissions and financial aid at Dickinson Law-The Pennsylvania State University. She formerly served as assistant director of financial aid at Dickinson College, and has worked in student aid for 3.5 years.

Formerly director of scholarships and financial aid, **Mike Scott** has been promoted to associate provost for enrollment management at Texas Christian University. He has worked in financial aid for 30 years.

With 27 years in the financial aid field, **Shannon Sheaff** is now director of school partnerships for FATV. She previously served as director of the West Region for Edfinancial Services.



Haley Lindsey



Dan Mann



Quinton Morgan



Christopher Natelborg



Tony Lubbers



Patrick McTee



Kelly Morrissey



Elaine Nowak

**Scott Sponholtz** has been promoted from associate director to director of financial aid for University of Kansas-Medical Center. He has served in student aid for 11 years.

**Kristin Stuhr-Mootz**, former system director of educational funding at Herzing University, is now director of student financial aid services at Medical College of Wisconsin. She has worked in student aid for 14 years.

**Christina Tangelakis**, former director of financial aid at Hispanic Scholarship Fund, is now associate dean of student financial aid at Glendale Community College. She has worked in student aid for six years.

**Umit Tanit Anwar**, former financial aid counselor at Art Institute of Portland, is now financial aid counselor at Portland State University. Umit has worked in student aid for nine years.

**Melissa Vargas**, now senior assistant director of student financial services for Felician University, previously served as professional services specialist IV at Kean University. She has worked in student aid for seven years.

**James Williams**, former interim director/associate director at University of Texas El Paso, is now director of financial aid at Texas Tech Health Sciences Center El Paso. He has served in the student aid profession for 36 years.

**Jennifer Williams**, former director of financial aid at Southern Arkansas University Tech, is now director of financial aid at University of Arkansas Community College at Morrilton. Jennifer has 11 years of experience in student aid.

**Michael Williams** is now director of financial aid at Schoolcraft College. He formerly worked at Macomb Community College as manager of client services and programs, financial aid. He has served in the student aid profession for 15 years and is currently serving as president-elect of MSFAA.

**Leah Young**, former director of admissions and financial aid at The Pennsylvania State University, Dickinson Law, is now director of financial aid for Dickinson College. She has worked in financial aid for 10 years.



Chandra Owen



Michael Ruggles



Tami Sato



Jennifer Satalino



Beryl Schantz

## Awards, Recognitions, & Other Achievements

RNASFAA honored **Ashley Jost** with the Oscar R. "Jack" Hendrix Award for rookie of the year at the RNASFAA Annual Conference in October 2017. Ashley has five years of experience in student aid and serves as communications/consortium coordinator at Johnson County Community College.

**Jennifer Satalino**, director of ECMC's The College Place Oregon, received the Golden W Award from Wilson High School in Portland, Oregon. The high school bestows this award annually to students, parents and community members who volunteer selflessly at Wilson High School. Jennifer has been providing a financial aid night at Wilson annually since 1990. She has served in the student aid profession for 28 years.



Shannon Sheaff



Scott Sponholtz



Christina Tangalakis

## Retirements

**Brenda Brown** has retired from her position as director of strategic initiatives at University of Miami; however, after more than 29 years in student aid, she will continue serving the higher education community as director of business development for College Aid Services, LLC. Brenda notes, "The times we spend together are memories in the making. Therefore, I chose [to spend more time with my] family and retired. I have accepted a position that will afford me flexibility to still work in the profession I've come to love and still allow me to care and spend more time with my father."

**Laure Chisesi** announced her retirement as senior associate director of financial aid at Lafayette College after 25 years in financial aid.

**Kathleen Cohen**, dean of financial aid at Elmira College, announced her retirement after 38 years of service in student financial aid.

After 38 years in student financial aid, **Cindy Deffenbaugh** announced her retirement from her role as assistant vice president and director of financial aid at University of Richmond.

**Sue Forbes** announced her retirement as director of financial aid at Gogebic Community College after 37 years.

**Governor Jackson** retired as executive director of financial aid at Texas Woman's University after 44 years in the financial aid profession serving students and mentoring financial aid professionals. He said, "It has been an honor and a privilege to have taken an active part in continuing the university's historic purpose of advancing the quality of the human experience, honoring diverse people and perspectives, and pioneering discovery in areas vital to the well-being of Texas and the nation."

**Ronald W. Johnson** retired as director of financial aid and scholarships at the University of California Los Angeles after 23 years of service and a total of 43 years in the student aid field. Ron cofounded the Latin American Achievement Program (LEAP), authored two books and numerous scholarly articles on student aid topics, and served the profession at the regional and national levels, including as a member of NASFAA's Board of Directors.

After 37 years in student financial aid, **Patrick McTee** has announced his retirement as director of student success services at American Indian College Fund.

**Anne Moomey** announced her retirement as assistant director of financial aid at Clarkson University after 37 years of service in student aid. She wrote, "Thanks to all of you who answered my questions over the years. It's been quite a ride!"

In 2018, **Carol Rubel** announced her retirement as director of financial aid for New England College of Optometry. During her 40-year career in student financial aid, Carol also worked for Wheelock College, Wentworth Institute of Technology, Boston University, and Syracuse University.

**Tami Sato** has retired as senior director of enrollment management and financial aid at Marshall B. Ketchum University after 37 years in student aid. She wrote, "This was my first full-time job and I have had my entire financial aid career at this university. What I will miss the most is the association work and the many colleagues that have become long-term friends. Continue to do good and carry on!"

**Beryl Schantz** announced her retirement as compliance & training officer in the financial aid & scholarships office at California State University, Sacramento. She has served in the student aid profession for 29 years.

**Debi Woodall-Stevens** announced her retirement from Randolph College as director of financial aid. She has served in financial aid for 10 years.



James Williams



Jennifer Williams



Michael Williams



# communications

Keeping NASFAA members, and the public, on the cutting edge of student aid issues

NASFAA's multifaceted communications efforts are at the core of all the association does. Our communications engage members in meaningful dialogue with one another; keep members aware of what is happening in the financial aid field and on college campuses nationwide; and promote the expertise and professionalism of financial aid administrators.

NASFAA informs members about important news and updates through its website, daily newsletter, and social media platforms. We also regularly publish press releases, send media alerts, write op-ed articles, and respond to media requests. This not only helps establish NASFAA and its members as reliable subject matter experts, it also ensures the media and the public receive the most accurate information possible on student aid issues.

## Today's News

Distributed each weekday morning to more than 22,000 subscribers, *Today's News*, NASFAA's email newsletter, provides insights and updates on student financial aid and higher education-related topics. Members rely on *Today's News* as their comprehensive student aid news source for everything from keeping up with proposed legislation to tracking regulatory issues and notices of proposed rulemaking, highlighting key findings and practical takeaways from the latest research reports, and learning about new NASFAA products and services.

## Top Today's News Content

Each year, NASFAA writes and publishes original articles targeted specifically to the interests of financial aid administrators. Below are the 10 most-read original articles researched and written by NASFAA reporters and policy staff between July 1, 2017, and June 30, 2018.

1. "[Ins and Outs of the FY 2018 Spending Bill](#)" (March 2018)
2. "[2018-19 Pell Grant Schedules Released, but Final Funding Levels Still Up in the Air](#)" (February 2018)
3. "[When Should We Expect the 2018-19 Pell Grant Schedules?](#)" (October 2017)
4. "[ED Confirms Prior Guidance on Release of FAFSA Information](#)" (September 2017)
5. "[NASFAA's Take on Year-Round Pell Implementation Questions](#)" (August 2017)
6. "[NASFAA Issues Summary of House Republicans' HEA Reauthorization Bill](#)" (December 2017)
7. "[FY 2018 Spending Bill Permits Sharing of FAFSA Data With Private Scholarship Providers](#)" (March 2018)
8. "[PROSPER Act: House HEA Reauthorization Bill's Impact on Loan Programs](#)" (December 2017)
9. "[Resolving 399 Codes: The September 9 Deadline Is Upon Us](#)" (September 2017)
10. "[Speaking With Students, Parents About Changes to the DRT](#)" (September 2017)



### Taking Today's News to New Heights

In spring 2017, NASFAA retained McKinley Advisors to conduct focus groups and telephone interviews with NASFAA members on the content and structure of *Today's News*. Our goal—to ensure NASFAA's flagship publication continues to meet and exceed the expectations of our members. Among other questions, members were asked what they liked and disliked about the existing format and content of *Today's News*, what they wished to see more of and less of, and what could help to make the presentation of *Today's News* more streamlined and efficient. Building on information gathered by McKinley, NASFAA staff drilled down further with a *Today's News* readership survey sent to both subscribers and non-subscribers. More than 2,300 NASFAA members completed the survey.



After considering the implications of various proposals resulting from the surveys, focus groups, and interviews, a specially convened team of NASFAA members—the 2018 *Today's News* Feedback Working Group—made recommendations to the NASFAA staff. Together with NASFAA's content management system developer, the staff brought a new vision of *Today's News* to life. On June 20, 2018, NASFAA launched an updated version of *Today's News*, complete with a new banner; clearer topic divisions; headlines linking directly to the source of the full article; graphic indications when an article requires a login to either the NASFAA site or an external source; and a weekly, bulleted "Trending @ NASFAA" section with links to the most popular articles of the week.

This update also added social media sharing buttons on nearly every page of NASFAA.org, allowing users to share NASFAA content on popular social media platforms. These buttons make it easy to email website resources to colleagues or yourself with just a few clicks.

## Multimedia Communications

In addition to news articles and reports, NASFAA also reaches out to members via podcasts and video projects.

### NASFAA's "Off The Cuff" Podcast Still Going Strong

In its second year, NASFAA's popular policy podcast, *Off The Cuff*, continued to bring members the latest news from the nation's capital with an insider's look into decisions shaping higher education policy nationwide. In 2017-18, NASFAA posted 41 episodes that garnered more than 30,000 unique downloads throughout the year. The *Off The Cuff* team discussed a wide range of topics from the federal budget and reauthorization of the Higher Education Act to negotiated rulemaking and significant changes within the U.S. Department of Education as positions within Office of Federal Student Aid shuffled. Members tell us the podcast is a "terrific informational service" that helps keep them up to date in a fun and relaxed way.

### NASFAA Launches New "Director Download" Podcast

In September 2018, NASFAA launched *Director Download*, a new podcast announced at the June 2018 NASFAA National Conference. *Director Download* focuses on leadership, management, career, and HR issues that reinforce themes covered during NASFAA's annual Leadership & Legislative Conference & Expo. Each episode features an interview with a subject matter expert followed by a lively group discussion among NASFAA President Justin Draeger, guest financial aid administrators, and NASFAA staff. Topics being considered for future podcasts include work-life balance tactics, managing interpersonal office relationships, communicating with leadership and with students, and advancing your career.

### NASFAA Video Projects

NASFAA produced 18 videos in 2017-18, giving NASFAA members a first-hand look into unique events, such as the Higher Education Committee of 50 convening in December 2017 and members taking to Capitol Hill for a NASFAA Advocacy Pipeline outing. In March 2018, NASFAA produced several short videos introducing staff from the communications team as part of a series designed to better acquaint members with the NASFAA staff. NASFAA also created an animated video in November 2017 to support its campaign to preserve the Federal Pell Grant reserves. The video received 2,300 views on Facebook alone. Another video series produced this year featured topic experts presenting in-depth explorations of current higher education issues.

## Media Engagement

NASFAA regularly engages with the media, in both proactive and reactive ways, to raise public awareness of the issues facing students, families, and institutions, as well as NASFAA's policy positions and advocacy efforts. Proactive media efforts include press releases, media email pitches, and op-eds submitted to various media outlets. Reactive media engagement involves reporters reaching out to NASFAA for comment or to gather solid background information from a reliable source for stories they are working on.

In 2017-18, media outlets—including CNBC, *The New York Times*, *The Wall Street Journal*, and *The Washington Post*—published 179 original articles mentioning NASFAA. These original articles, as well as NASFAA's press releases, were reprinted 2,035 times during the period.


On the proactive media front, NASFAA successfully published five op-eds on cutting-edge student aid topics in prominent publications:

- "[What the Trump Administration Could Do to Improve Student Loans](#)," in *Education Week* - July 12, 2017
- "[Cutting From the Pell Grant Reserve Fund Is Worse Than It Sounds](#)," in *Inside Higher Ed* - September 15, 2017
- "[Dampening Innovation, One Institution at a Time](#)," in *Inside Higher Ed* - September 29, 2017
- "[Don't Make Getting Financial Aid Harder; Students Should Be Able to Authorize the Use of Their Own Financial Aid Data](#)," in *U.S. News and World Report* - February 23, 2018
- "[Cutting Federal Student Loans to Save Taxpayers Money Is Not the Best Idea](#)" in *The Hill* - February 23, 2018 (on the PROSPER Act)



# what went wrong with verification?

by Allie Bidwell, NASFAA senior reporter



Over the last decade, the U.S. Department of Education (ED) has made attempts to reduce financial aid verification rates. But despite these attempts to ease the verification burden, a complex web of promised solutions and new requirements has resulted in little to no change in verification rates, creating a troubling situation for both students and schools.

Financial aid administrators know all too well how easily the verification process can derail students who otherwise would receive the financial aid needed to pursue their college dreams. Not only can it impose an undue burden on students who have already overcome incredible obstacles, but it also creates more work for aid administrators, taking their valuable time away from the people who matter most: their students.

A new resource, "History of Changes to Financial Aid Verification," first revealed at the 2018 NASFAA National Conference in Austin this summer, outlines the sort of "one step forward, two steps back" pattern that the financial aid community has come to know with regard to verification.

Nearly 10 years ago, ED first made the IRS Data Retrieval Tool (DRT) available for limited use. This tool alone should have greatly reduced if not essentially eliminated the need for verification, as it imports data already considered verified into a student's FAFSA. A few years later, during the 2012-13 award year, ED proposed creating a more targeted, fine-tuned verification system, while simultaneously removing the 30 percent cap. The latter was done with the expectation that the former would produce a more accurate and efficient verification system. Around the same time, the DRT became available for more widespread use and was recognized as an acceptable form of verification documentation.

However, these seemingly positive changes ended up falling short of their promise. "In the end, the fine-tuning came up short while the amount of data elements and numbers of students selected for verification soared," NASFAA President Justin Draeger wrote in a recent op-ed published in *The Hill*.

Another stumbling block came along when ED imposed the verification of non-filing (VONF) status requirement in the 2014-15 award year, a cumbersome and lengthy process that was eventually extended to all schools.

With the implementation of prior-prior year (PPY) income data on October 1, 2016, for award year 2017-18, there was more promise for reduced verification burden, as more applicants would be using the DRT. But shortly thereafter, the IRS DRT was suddenly taken offline—a move that was not initially transparently acknowledged by either ED or the IRS and lasted throughout the 2016-17 and 2017-18 award years. Without the DRT, applicants required to submit documentation for VONF had to jump through additional hoops to obtain tax transcripts before ED allowed for alternative documentation.<sup>1</sup> Soon after the DRT was restored, ED revealed there was a glitch in the verification model, but subsequently said there would be no changes to verification requirements for 2019-20.

In sum, a series of unfortunate events, some controllable by ED and some not, have led to this current predicament.

In attempting to make adjustments to the verification model, ED is caught between a rock and a hard place as it tries to balance competing congressional mandates that seek to maintain program integrity while also making student aid funds available to needy families. Lawmakers are at the same time pushing for financial aid dollars to make it to the right students with as little burden as possible. But they also are quick to pounce on any anecdotes of financial aid abuse, misuse, or misappropriation.

While the situation could be improved with greater transparency from ED as to the reasoning or data behind selection criteria, and whether there are data to show the necessity of VONF, the real solution is to fix the FAFSA. Simplifying and improving the FAFSA expanding the use of the DRT and by auto-importing data already considered verified by other federal agencies would eliminate the need for verification altogether.

NASFAA has proposed creating a tiered application that offers applicants a customized set of questions, rather than sticking with a blanket approach for applicants from all income levels. The more complex a family's financial status, the more data would be required from them. But by expanding the information that can be imported via the IRS, all applicants would have fewer questions to complete.

Take a look at the verification timeline<sup>2</sup> and read Draeger's full op-ed in *The Hill*<sup>3</sup> on how fixing the FAFSA can solve the issues with verification.

*(Adapted from "What's Wrong With Verification?" first published in NASFAA's Today's News on July 26, 2018.)*

<sup>1</sup> [https://www.nasfaa.org/news-item/11893/ED\\_Announces\\_Verification\\_Relief\\_During\\_IRS\\_DRT\\_Outage](https://www.nasfaa.org/news-item/11893/ED_Announces_Verification_Relief_During_IRS_DRT_Outage)

<sup>2</sup> [https://www.nasfaa.org/uploads/documents/History\\_Changes\\_Financial\\_Aid\\_Verification\\_Timeline.pdf](https://www.nasfaa.org/uploads/documents/History_Changes_Financial_Aid_Verification_Timeline.pdf)

<sup>3</sup> <http://thehill.com/blogs/congress-blog/education/397145-to-freeze-summer-melt-in-its-tracks-congress-must-fix-the-fafsa>

# training & regulatory assistance

engaging members with e-learning, self-help tools, and the latest updates to regulation, legislation, and compliance

NASFAA's Strategic Long-Range Plan includes developing and promoting the professionalism and leadership capacity of financial aid administrators. The training team is charged with ensuring our members have the tools and training they need to be successful stewards of federal student aid and to grow personally and professionally within the financial aid community. To accomplish this, we offer training, testing, webinars, regulatory resources, and peer-based evaluation programs to help keep financial aid offices across the nation operating at peak performance.

## NASFAA U

NASFAA U provides both online and self-paced learning opportunities for financial aid professionals. Online courses and Self-Study Guides deliver thorough training and insights into the complex topics that comprise Title IV aid. NASFAA members and non-members within the aid community can save time and money utilizing resources and participating in training activities from the comfort of their own office. We update resources and syllabi annually to ensure compliance standards are relevant for today's aid administrator. This year saw 2,200 Self-Study Guides downloaded and more than 970 online course registrations. Assessments of user satisfaction with online education yielded a 4 out of 5 rating, demonstrating continued high satisfaction with both the material and the instruction. Details about NASFAA U appear at [https://www.nasfaa.org/NASFAA\\_U](https://www.nasfaa.org/NASFAA_U).

## NASFAA U Topics

- Administrative Capability
- Application Process
- Campus-Based Programs
- Cash Management
- Consumer Information
- Cost of Attendance
- Direct Loan Program
- Federal Pell Grant and Iraq and Afghanistan Service Grants
- Gainful Employment
- Need Analysis
- Packaging and Notification of Awards
- Professional Judgment
- Return of Title IV Funds
- Satisfactory Academic Progress
- Student Eligibility
- TEACH Grant
- Verification

### June 2018 to July 2019 NASFAA U Schedule

|  |          |
|--|----------|
| Overview of the Financial Aid Programs                           | 7/9/18   |
| Return of Title IV Funds   | 9/10/18  |
| Verification 2019-20 – I   | 10/15/18 |
| Satisfactory Academic Progress Overview                          | 10/16/18 |
| Verification 2019-20 – II  | 11/27/18 |
| Pell & IASG  | 1/14/19  |
| Consumer Information   | 2/19/19  |
| Direct Loans   | 3/5/19   |
| Nontraditional Calendars and Programs: The Title IV Implications | 4/1/19   |
| Overview   | 4/30/19  |
| Overview   | 7/9/19   |

## State and Regional Partnerships: Authorized Events

For the third year, NASFAA offered its Authorized Events suite of training materials to state and regional associations. Authorized Events allows states and regions to present high-quality training events in their own backyard without investing the time and energy required to develop training materials. NASFAA bases Authorized Events on its comprehensive Self-Study Guides. Associations can bundle or purchase individual topics for use at their training events and conferences. Each topic includes the study guide, instructor guide, participant workbook, presentation slide deck, and slide handouts and free testing vouchers for participants. NASFAA updates these materials annually, and this year we also added a topic overview slide presentation and instructor guide to address the needs of presenters under time constraints. All six regions and 39 state associations used Authorized Events in their training efforts this year.

## NASFAA Webinar Series

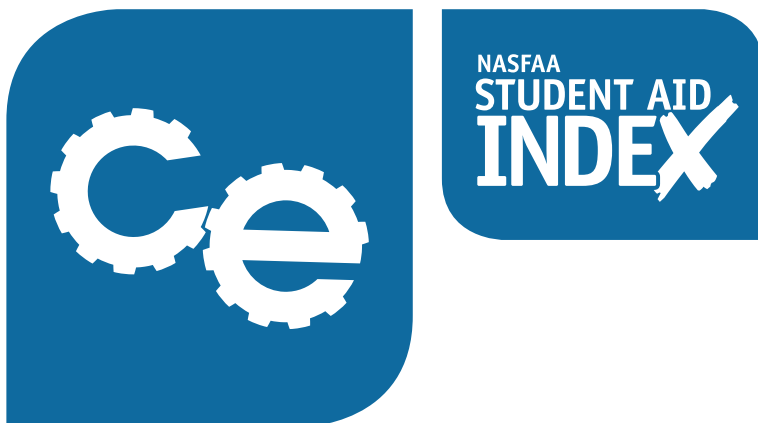
Our annual Webinar Series continues to be a popular avenue for receiving timely information and updates on what's happening in the financial aid field. NASFAA presents relevant topics in various formats to meet the diverse needs of our members. Guest speakers, member participation, and the ability to watch individually or in groups make this an especially dynamic means of receiving training.

### 2018-19 Webinar Schedule

- 2019-20 FAFSA: Brave New World - September 12, 2018
- Citizenship Status and Title IV Aid Eligibility - October 3, 2018
- A Panel Discussion on NASFAA Peer Review Services - October 16, 2018
- Return of Title IV Funds Highlights: AskRegs FAQ - October 24, 2018
- Verification: 2019-20 - November 14, 2018
- NASFAA Policy Update - December 4, 2018
- A Day Short and a Dollar ... Late? Or Is That Retroactive or Post Withdrawal? - December 12, 2018
- Which Is It? A Correction, Update, or PJ? - January 23, 2019
- Diversity Discussion - February 20, 2019
- Pell Highlights: AskRegs FAQ - March 13, 2019
- Graduate/Professional School Town Hall - March 20, 2019
- Building Bridges: Understanding Cross-Cultural and Cross-Generational Differences - April 24, 2019
- Exploring NASFAA Benefits - May 7, 2019
- Consumer Information Disclosures Highlights: What? When? Who? - May 15, 2019
- NASFAA Policy Update - May 21, 2019
- Hot Topic Webinar - June 5, 2019

For more information on NASFAA's 2018-19 Webinar Series, see [https://www.nasfaa.org/Webinars\\_Live\\_and\\_On\\_Demand](https://www.nasfaa.org/Webinars_Live_and_On_Demand)





## NASFAA Credentials

NASFAA Credentials are topic-based exams that mark proficiency and in-depth knowledge in Title IV aid administration. In just six years since its inception, more than 4,300 individuals have earned over 12,000 credentials.

Responding to the high demand for additional professional development, NASFAA recently announced plans to create a Certified Financial Aid Administrator (CFAA) program, expected to launch in June 2019. This professional certification—the first of its kind in the financial aid profession—will allow aid professionals to establish nationally recognized competency and further their professional standing through continued education. The initial response to this announcement has been exceedingly positive. NASFAA looks forward to the development of this initiative.

## Standards of Excellence

Now in its 20th year, NASFAA's Standards of Excellence (SOE) Review Program has helped more than 250 schools leverage their strengths, reduce compliance risks, and maximize performance. SOE reviews deliver a comprehensive evaluation of financial aid operations and help ensure compliance at every level. Members who have completed an SOE review say it mirrors a federal program review, but in a friendly and collegial way.

A full SOE review includes a Consumer Information Assessment, which we also offer as a stand-alone evaluation focused on compliance with disclosure and reporting requirements in nearly 20 different areas across campus. Both the full review and Consumer Information Assessment offer the benefit of colleagues' experience and collaboration from our team of currently practicing financial aid administrators. In 2017-18, NASFAA completed 13 full reviews and nine Consumer Information Assessments. Read about 20th anniversary of SOE on page 40 and visit <https://www.nasfaa.org/SOE> for more information about the program and how to request a review.



## NASFAA AskRegs and Knowledgebase

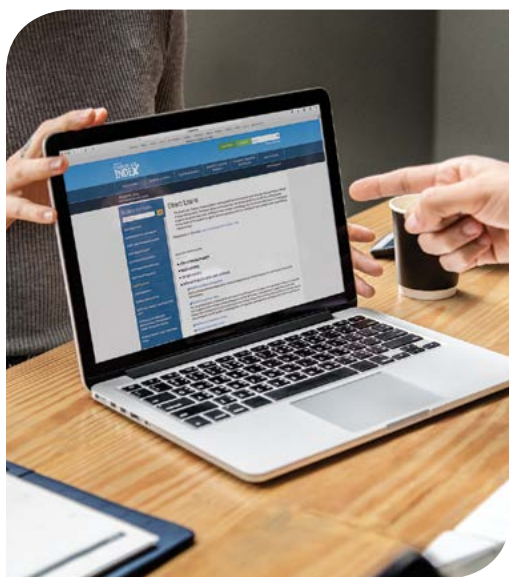
NASFAA's AskRegs Q&A service and the Knowledgebase, which houses more than 3,000 regulatory articles, continue to be member favorites (<https://www.nasfaa.org/AskRegs>). In the last year, members posed more than 4,700 questions to the AskRegs staff. Add to that the more than 700,000 searches of the Knowledgebase made last year, and you have a powerful tool that members clearly depend on for their compliance needs. Members tell us they enjoy the anonymity these tools afford them, and they feel confident in the researched answers, which include regulatory citations whenever possible.

## NASFAA Student Aid Index

NASFAA's Student Aid Index, available at <https://www.nasfaa.org/StudentAidIndex>, provides important financial aid regulations, legislation, and other key resources in one convenient, mobile-friendly tool so you have the information you need when you need it. This tool saw a 67 percent increase in use in 2017-18 over the prior year.

### Top 5 Most-Used Student Aid Index Topics

- Professional Judgment
- Student Eligibility
- Administrative Capability
- Satisfactory Academic Progress
- Need Analysis



## NASFAA Compliance Engine

NASFAA built its Compliance Engine Self-Evaluation Checklists and Policies & Procedures Builder to help financial aid administrators effectively manage the challenges of compliance administration. The two components of this online tool combine checklists from NASFAA's Self-Evaluation Guide and templates from the Policies & Procedures Toolkit. The Compliance Engine's easy-to-use, collaborative features allow institutions to centralize all compliance and policies and procedures information online at <https://www.nasfaa.org/engine>.

### Top 10 Most-Used Checklists

- Cash Management
- Student Consumer Information
- Federal Direct Student Loan Program
- Verification
- Return of Title IV Funds
- Satisfactory Academic Progress
- Appendix A: Document Control
- Student Eligibility
- Campus-Based Programs, Common Provisions
- Recommended Good Practices

### Top 10 Most-Used Policies & Procedures Toolkit Sections

- Section 1: Manual Introduction
- Section 3: Financial Aid Programs
- Section 2: Administrative Organization and Office Management
- Section 12: Satisfactory Academic Progress
- Section 4: Institutional Requirements Relating to Education Loans
- Section 5: Student Consumer Information Requirements
- Section 7: File Review
- Section 6: Applications and Forms
- Section 10: Professional Judgment
- Section 8: Student Budgets

# SOE: celebrating 20 years of excellence!

by Linda Conard, NASFAA

Twenty years ago, the Standards of Excellence (SOE) Review Program grew out of a beautifully simple idea: Currently practicing financial aid administrators would perform reviews to help their peers improve their financial aid operations. NASFAA's 1996-97 Board of Directors and SOE Task Force brought that idea to life with the launch of SOE, a unique and powerful service for both identifying challenges and achieving excellence in financial aid administration.

The Board and Task Force envisioned offering institutions far more than the evaluations already available through basic audits, federal program reviews, or consultant-led options. SOE's peer reviews had to be comprehensive, confidential, objective, supportive, and voluntary—all while maintaining NASFAA's extremely high standards. Reviews would need to help both seasoned financial aid leaders and new directors find hidden threats to compliance, improve customer service, make the best use of available resources, and even make the case for additional resources to improve operations. And, to really stand out, SOE reviews would need to provide a nonpunitive, peer-to-peer experience as well as highlight best practices and ultimately help raise the standards of financial aid operations among all NASFAA member institutions.

To achieve this mammoth challenge, the Task Force turned to Vernetta Fairley, then-director of financial aid at the University of Southern Mississippi. Fairley took the lead in creating the comprehensive peer review program from scratch. Working with Joan Crissman and Connie McCormick from the NASFAA staff, Fairley assembled a team of four talented reviewers and writers—Bob Collins, Pam Fowler, Susan Luhman, and Micki Roemer—representing financial aid offices of different sizes and types from across the nation.

"We essentially had a panel of experienced thinkers to help get the program off to a good start," explained Fairley. "We tweaked and went back to the drawing board several times, but the initial review process worked well. Reviewers felt a sort of ownership of the program's success and would offer suggestions to make it better."

In fall 1998, Fairley and her four-member SOE review team performed the first three pilot reviews that led to the program's full launch in January 1999. Today, SOE is not only celebrating its 20th anniversary but also the positive impact of the 250 SOE reviews performed across the country since the program began.

## Comprehensive and Current

SOE reviews have always remained on the cutting edge of regulatory changes and paradigm shifts in higher education administration. However, the program's core, peer-centered approach has changed very little over the years.

"SOE uses a time-tested formula for helping schools achieve financial aid excellence," explained Mandy Sponholtz, NASFAA's current SOE program administrator. "Our review items may change, but not the overall program. SOE is just as valuable now as it was envisioned 20 years ago—even more so, given the additional regulatory burden financial aid administrators face today," she said.

SOE's unique approach covers far more than annual audits. "We often find significant issues the auditors completely missed," said SOE Reviewer Chuck Knepfle.



**Full SOE reviews deliver a complete assessment of all aspects of Title IV administration, including**

- ★ Systems, automation, and technology use
- ★ Program compliance, operations, and delivery
- ★ Customer service and satisfaction
- ★ Institutional eligibility (including consumer information)
- ★ Administrative capacity
- ★ Human resources and facilities

**The Consumer Information Assessment, whether part of the full review or contracted separately, examines compliance in**

- ★ Gainful employment
- ★ Financial assistance information
- ★ Third-party servicers
- ★ Campus security and fire safety
- ★ Institutional information
- ★ Graduation, completion, and placement rates
- ★ Drug and alcohol awareness
- ★ Family Education Rights and Privacy Act (FERPA)
- ★ Athletics
- ★ Teacher preparation
- ★ Voter registration

By design, audits focus solely on compliance, and auditors generally lack a working knowledge of financial aid. Full SOE reviews examine compliance within the bigger picture of customer service, workflow, technology use, interdepartmental cooperation, and more, through the program's comprehensive, in-person evaluations.

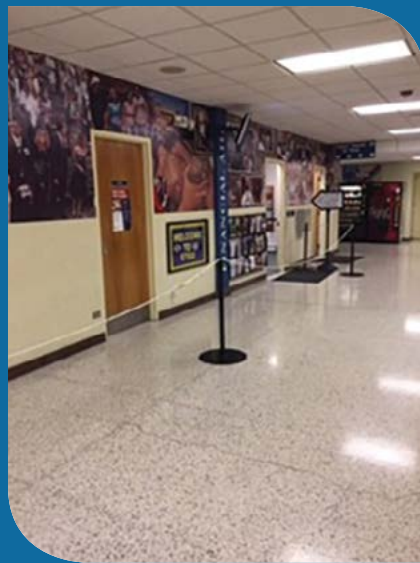
"SOE reviews are a great opportunity for schools to address issues before an audit or program review, reducing the potential that compliance issues will be found and liabilities assessed," said SOE Reviewer Brad Barnett.

"It's a great way to uncover compliance challenges without involving a visit from our friends in the Department of Education," said SOE Reviewer Phil Asbury.

"Almost every review now has at least five to 10 consumer information findings," said Knepfle.

These findings not only mean families miss out on important consumer information, but they also put the school at risk for heavy fines and bad press. For example, a single Clery Act violation carries a maximum fine of \$54,789. That's about 15 times more than the cost of an SOE review. Between 2010 and 2017, the U.S. Department of Education (ED) assessed 45 schools Clery Act fines ranging from \$5,000 to \$2.4 million, with an average of \$360,000. Beyond campus security (e.g., items such as IPEDS nonsubmission or incentive compensation), ED assessed 27 institutions fines averaging over \$1.2 million per school. Using a CI Assessment, schools can quickly discover and resolve such missing pieces in their consumer information compliance.

Joseph Sherwin, vice president for student affairs at Eastern Tennessee State University (ETSU) sent this photo to NASFAA to illustrate how an SOE review impacted his operations. Every year, the university's president would serve pizza to the students lined up outside the financial aid office at registration. However, after they implemented changes resulting from the review, the financial aid office had no lines the following year. Sherwin explained, "The president then served the pizza to the staff ... and I think pepperoni never tasted so good!"



## The Power of Peers

The exclusive use of peers as reviewers sets SOE apart from all other audits and reviews. Before beginning a review, Sponholtz hand selects the right team leader to work directly with the institution's staff, and that team leader chooses the best review team to fit the school's unique needs.

Every reviewer and team leader is a financial aid professional currently working in a financial aid office. "We know the challenges schools face; it's likely we have faced them as well," Asbury said. "We aren't consultants whose job is to simply provide advice or information. Peer reviewers spend their time working in their own offices ... because of this, our knowledge is much more current."

"Reviewers bring a wealth of experience and knowledge with them from their own financial aid careers," Barnett added. "Staff at schools have the opportunity to engage in discussions with SOE reviewers about much more than just regulatory issues, and they benefit from the reviewers' process experiences."

The collegial nature of SOE reviews also allows staff to be more forthcoming with reviewers, which helps reveal potential challenges and allows solutions to be found before they grow into larger problems. "It's a nonpunitive way to measure the effectiveness of your office," Asbury said.

"We have experienced your struggles firsthand and can make recommendations for improvement and point to compliance exceptions that many auditors wouldn't notice," said Mark Diestler, an SOE reviewer who previously served as a federal program reviewer. He added, "I don't think you can get more bang for your buck anywhere else."

## Tackling Consumer Information

In spring 2017, SOE launched its new Consumer Information (CI) Assessment, which delivers the consumer information portion of the full SOE review as a separate, more economical review conducted off campus. The CI Assessment helps address an alarming trend noted by SOE reviewers: Increasingly, schools are failing to meet all the disclosure and reporting rules.

## The Aid Office and Beyond

Institutional eligibility for federal student aid funds extends far beyond the aid office. SOE reviews can help distinct divisions on campus recognize their shared responsibilities and build collaborations. For Kim Lamborn, a new financial aid director at University of Western States, building those collaborations was among the top reasons she sought a review. "I wanted to raise awareness, create buy-in, and foster relationships with other departments," she said.

SOE's external perspective can also help institutional executives better understand the needs of the financial aid office. "One of the biggest challenges facing some of the schools we review is not having the institutional support to make needed changes," said Alison Rabil, who first had an SOE review as a new director and later joined the SOE team as a reviewer. "An SOE review gives you institutional traction because someone from outside is evaluating and making suggestions for improvement," she said.

## Twenty Years of Excellence

SOE's 20 years of success clearly demonstrates the program's strength and longevity. But both the reviewers and reviewed schools know the best reason to celebrate is SOE's impact on helping schools achieve their goals for their financial aid operations.

"Receiving a formal SOE review report allowed us to approach management for support in rectifying the situations we had. It demonstrated that we were being proactive, had a 'road map' for the fixes and implementations, and had a realistic assessment of what we were facing," said Patrick Scott, director of financial aid at Cuesta College.

"Having been with this program for years, I know we have helped countless aid offices avoid trouble with the Department of Education, shown them a better way to do things, pointed out staff issues and problems, and become mentors to their aid directors," said Pam Fowler, an SOE reviewer who helped shape the original program in 1998 and has performed reviews throughout SOE's 20-year history.

Barnett added, "I've been on reviews where you can see the staff are hungry for help, very appreciative for us being there, and willing to engage in some fantastic conversations about how to improve what they are doing. When I see the smiles on their faces after they feel an issue has been solved and hear the relief they express about having some direction, well ... I know when I go home that I've made a positive difference."

To learn more about SOE and submit a Peer Review Information Request, see <http://www.nasfaa.org/SOE>.

# Fast Facts About SOE and CI Assessment

250

Total SOE reviews completed by the end of 2017-18

20

Number of years NASFAA has delivered comprehensive SOE reviews at postsecondary institutions of every type, size, and sector

67

NASFAA U credentials earned by SOE reviewers

735

Combined years of experience of SOE reviewers (the average is 28 years!)

85

Pages of guidance peer reviewers receive to complete a CI Assessment

458

Pages of guidance peer reviewers receive to complete a full SOE review (compared with the 45-62 pages provided by the federal government to auditors)

# 2018 nasfaa national conference

where financial aid professionals go to exchange ideas and discover answers



NASFAA's National Conference is the premier event serving the student financial aid community. Financial aid professionals from across the nation arrive at the conference each year to increase their knowledge, network with colleagues, and learn the latest requirements, trends, and strategies in student aid.

Wes Moore, a U.S. Army combat veteran, CEO of Robin Hood Foundation, and best-selling author of *The Other Wes Moore*, opened this year's conference with inspiring words about his journey from troubled city youth to decorated veteran and Rhodes Scholar. Moore recounted how the support of his parents, mentors, community, and the educational opportunities unlocked by student aid helped him change the course of his future. He contrasted his fate with that of another man named Wes Moore who grew up just a few blocks away but ultimately ended up in prison.

Held June 24-27, 2018, in Austin, TX, the conference also featured policy updates by NASFAA President Justin Draeger and NASFAA Vice President Megan Coval, a preconference session on diversity, passing the gavel of leadership from 2017-18 National Chair Billie Jo Hamilton to 2018-19 National Chair Lori Vedder, a U.S. Department of Education general session update and break-out sessions, performances by talented Austin musicians, and a rocking NASFAA dance party. For the first time, NASFAA also live-streamed general and concurrent sessions, which allow financial aid professionals nationwide to benefit from key conference events even when they can't attend in person.

This year, conference attendees selected from 85 sessions led by a total of 241 presenters and moderators. Four distinct tracks—advocacy, serving as a forum, professional development and management, and training—reflected NASFAA’s overall mission. Each track included sessions within six subcategories:

- Compliance
- Enrollment and Retention
- Graduate and Professional Issues
- Leadership/Managers
- Regulatory Implementation
- Research and Data Analysis

Of the 2,200 conference registrants, 76 percent were from institutions. Attendance represented over 30 percent of NASFAA’s overall institutional membership and 60 percent of NASFAA’s associate membership (i.e., business partners).

Online registration for the 2019 National Conference in Orlando, FL opens in January 2019. See <https://www.nasfaa.org/conference> for more details.

# AUSTIN 2018

## Great! Excellent! The Best! Praise from NASFAA conference attendees

*“The conference was great, and the range of topics offered was phenomenal. Thank you!”*

*“It was a great conference. I didn’t attend one session where I didn’t learn something to take back to campus with me.”*

*“Wes Moore was probably the best conference speaker I’ve ever heard!”*

*“Overall, I thought the conference was excellent. Thank you NASFAA staff for caring about what you do and taking pride in your work. It was visible throughout the conference.”*

*“One of the best conferences I’ve attended in a long time!”*

*“I value this conference and it gets better every year.”*

*“The NASFAA staff was amazing and helpful and easy to talk to!”*



# in pictures: the 2018 nasfaa national conference



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2



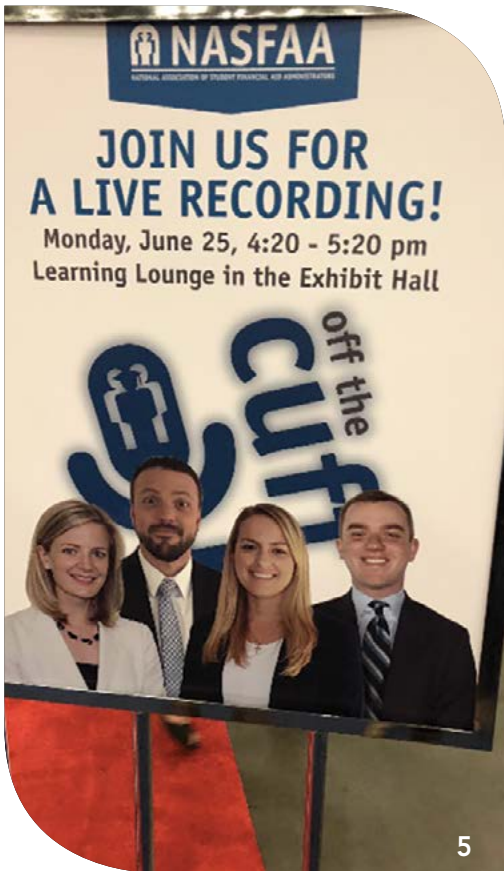
3



4

1. Austin's skyline, ready to greet NASFAA members arriving from every corner of the country.
2. Diversity expert Lena Tenney explores explicit beliefs and implicit bias in a packed preconference session.
3. 2017-18 National Chair Billie Jo Hamilton addresses a conference crowd of more than 2,000 members.
4. General sessions combine key updates with great networking opportunities.





5



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7



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- 5. NASFAA's "Off The Cuff" podcast - live!
- 6. The conference is the perfect place to connect with colleagues.
- 7. Presenter David Tolman tackles the challenges of return of Title IV funds.
- 8. Great music is everywhere in Austin!



9. Keynote speaker Wes Moore's inspirational life story captivates the opening session audience.

10. The Exhibit Hall photobooth is a knockout!

11. NASFAA's booth—the place to learn everything NASFAA can do for you.

12. Celebrating 20 years, Standards of Excellence is an Exhibit Hall star.



13



14



15



16

13. & 14. New friends and fun at the annual first-time attendee event.  
 15. Lori Vedder delivers her first address as 2018-19 national chair.  
 16. Treasurer Lisanne Masterson reports on NASFAA's finances at the Annual Business Meeting.

# 2018 nasfaa awards

kudos and gratitude for exceptional service!

Every year at the National Conference, NASFAA recognizes individuals and groups in the financial aid and higher education community who exemplify excellence. This year, 13 individuals and groups received these honors.



*Bonnie Joerschke receives the Lifetime Achievement Award from 2017-18 National Chair Billie Jo Hamilton and NASFAA President Justin Draeger*

NASFAA awarded its **Lifetime Achievement Award**—the very highest honor the association can bestow on a member—to **Bonnie Joerschke**, director of the Office of Student Financial Aid at the University of Georgia. Joerschke has spent 43 years advocating for the ideals of NASFAA and the financial aid profession. She has served on and/or chaired committees for NASFAA, SASFAA, MASFAA, SWASFAA, GASFAA, and OASFAA; has been a leader in reauthorization and legislative efforts; has presented 34 times at national, state, and regional meetings; and has made a difference in the lives of thousands of students.

**Billie Jo Hamilton**, associate vice president of enrollment planning and management at the University of Florida, received the **Allan W. Purdy Distinguished Service Award**. Hamilton served as National Chair in 2017-18; has served on several NASFAA committees as chair or commission director; and has served as representative-at-large on NASFAA's Board of Directors. Hamilton's career has spanned 35 years and five states, and she's served at every level in state, regional, and national associations. She currently supervises the offices of admissions, registrar, and university scholarships and financial aid services at the University of South Florida.

This year, NASFAA recognized three financial aid professionals with the **Meritorious Achievement Award**, which is presented to individuals who have made either an important single contribution or significant multiple contributions to NASFAA and the profession.

- **Joan Berkes**, former senior policy analyst at NASFAA. Berkes retired in 2017 after more than 30 years at NASFAA, where she made countless significant contributions that have played a key role in NASFAA's success and in helping schools to better serve their students. She began her career working in admissions and financial aid at a public four-year college in Upstate New York, joined NASFAA in 1986 as part of the Training team, and eventually became part of the Policy and Federal Relations team.
- **Anna Griswold**, former assistant vice president of undergraduate education; executive director for student aid at Pennsylvania State University. Griswold retired from Penn State after 27 years of serving students there and 48 years in the financial aid profession. Under her direction, the FINAID-L listserv was created as a means for aid administrators around the country to communicate. She served on the Direct Loan Coalition Board; authored white papers; volunteered with PASFAA, EASFAA, and NASFAA; is a charter member of the Coalition of State University Aid Administrators (COSUAA); and serves on the executive board of the Higher Education Loan Coalition. At Penn State, Griswold holds a faculty senate appointment and serves on both the Financial Literacy Advisory Board and the Governance Committee of the university's student information system.
- **Roy Lopez**, senior regional/financial aid advisor at Texas A&M University. Lopez's commitment and willingness to serve those in need in the financial aid and academic world spans over 25 years. He is the founder and CEO of the annual Fiestas Patrias Mexicanas event, which has promoted education through cultural celebrations, the arts, and scholarships for postsecondary education for 27 years. Fiestas Patrias has awarded more than \$300,000 in scholarships to students with financial need. Lopez has also written numerous articles in *La Voz Hispanica* newspaper on topics related to obtaining a postsecondary education.



*Billie Jo Hamilton receives the Allan W. Purdy Distinguished Service Award from 2018-19 National Chair Lori Vedder and NASFAA President Justin Draeger*



*Anna Griswold receives the Meritorious Achievement Award*



*Roy Lopez accepts the Meritorious Achievement Award*



Mary Sommers accepts her Statement of Appreciation



Four NASFAA Regional Award winners



CUNY Brooklyn College with their Gold Star Award



Gold Star Award winners from the University of Texas at Austin

**Mary Sommers**, director of financial aid at University of Nebraska at Kearney, received NASFAA's **Statement of Appreciation**. In close to 30 years in the profession, Mary has served on NASFAA's Board, headed up key task forces, and held leadership roles in NEASFAA and RNASFAA. She earned NASFAA's Meritorious Achievement award in 2012. Since July 2015, Sommers has served as NASFAA's first Ethics Commission chair, guiding the Commission's work to educate members on their ethical responsibilities, enforce ethical conduct among financial aid administrators, sanction those who fall knowingly out of compliance with our Code of Conduct, and ensure the reputation of our profession remains above reproach.

NASFAA presented **Regional Leadership Awards** to six recipients who have exhibited high integrity and character, have shown creative leadership, and have inspired and encouraged others to actively participate in professional development. One award was given in each of six regions:

- **EASFAA** – **Odette Franceskino**, director of financial aid, Quinnipiac School of Law
- **MASFAA** – **Val Meyers**, associate director of financial aid, Michigan State
- **RNASFAA** – **Art Young**, director of financial aid, Utah State University
- **SASFAA** – **Nathan Basford**, loan processor, Florida State University
- **SWASFAA** – **Janell Valdez**, associate director of student financial services, University of New Mexico-Health Sciences Center
- **WASFAA** – **Kathleen Campbell** (retired), dean of financial aid and veterans services, Chemeketa Community College

Two institutions received this year's **Gold Star Awards**, which recognize innovative ideas in the financial aid arena:

- **CUNY Brooklyn College** earned the Gold Star Award for its "Data-Driven Financial Aid Cohort Advisement Model," designed to assist low- and middle-income and first-generation families in navigating the financial aid application process. After implementing the model, the percentage of CUNY Brooklyn College students receiving some sort of financial aid increased 22 percent from the previous year. The model provides students with vital information about student loans and stresses the importance of maximizing federal and state grant eligibility, which led to a direct reduction in student loan borrowing.
- **University of Texas at Austin** received the Gold Star Award for its "eTASFA" project, developed to modernize the application portion of the financial aid process and allow students to electronically report financial data through a self-serve web solution. eTASFA went into production in October 2017 after 18 months of development. As of February 2018, approximately 160 students have used it, saving 20 hours per week of staff time.



# nasfaa leadership & legislative conference & expo

advancing student aid advocacy and leadership

NASFAA held its 2018 Leadership & Legislative Conference & Expo in Washington, D.C. from February 26-28, 2018. In this highly anticipated annual event, aid professionals from across the country gather to discuss innovative approaches to student aid leadership and participate in advocacy efforts with lawmakers and their staff.

This year, all four pathways—Association Management, Fundamentals of Enrollment Management, New & Aspiring Aid Directors, and Strategic Enrollment Management—involved expert presenters and extensive audience engagement. The Association Management pathway featured a thought-provoking presentation by Michela Perrone, whose firm, MMP Associates, specializes in nonprofit board development, strategic planning, organizational development, and leadership effectiveness. A host of highly experienced panelists and speakers led sessions across both the Fundamentals and Strategic Enrollment Management pathways. Participants in our New and Aspiring Aid Directors pathway were treated to advice from prominent aid administrators from across the country. Capping the event, NASFAA President Justin Draeger outlined the latest in industry news in a general session, followed by a fascinating discussion of the future of work and leveraging diversity presented by Anne Loehr, author and executive vice president of the Center for Human Capital.

The 2019 Leadership & Legislative Conference & Expo will be held February 25-27, 2019, in the Washington Hilton, Washington, D.C. For details and registration information, see <https://www.nasfaa.org/leadership>.



|                                       | # Registrations |
|---------------------------------------|-----------------|
| Association Management Pathway        | 76              |
| Fundamentals of Enrollment Management | 63              |
| New & Aspiring Aid Directors Pathway  | 81              |
| Strategic Enrollment Management       | 82              |



McCall Hopkin: 2018

# the dallas martin endowment



The Dallas Martin Endowment (DME) for Public Policy and Student Aid prepares the next generation of student aid advocates with boots-on-the-ground experience in NASFAA's D.C. office and on Capitol Hill. Each year, NASFAA awards a summer internship to an upper-division undergraduate or graduate student interested in financial aid policy and/or research. Named in honor of NASFAA President Emeritus A. Dallas Martin, Jr., once hailed by the *Washington Post* as Washington D.C.'s most effective higher education advocate, the award gives DME interns in-depth knowledge of student aid issues and hands-on experience in advocacy and research. Interns work alongside NASFAA staff and take on challenging roles that expand their understanding and knowledge far beyond the confines of the classroom. Since 2012, DME has sponsored seven talented interns. To view a full list of donors or support DME with a donation, visit <https://www.nasfaa.org/dme>.



Brianna Hayes: 2017



Janette Martinez: 2016



Angel Flores: 2015

## 2017-18 Donations to the Dallas Martin Endowment

### Platinum Level: \$500 to \$999

Justin Draeger

### Silver Level: Up to \$99

Jennifer Achan

Traci Armes

Kimberly Bennett

Marian Carter

Erika Clark

Yvonne Clarke

Jill Colburn

Susan Creager

Leana Davis

Matthew DeSorgher

Paul Dieken

Peggy Fikse

Kimberly Geer

Lisa Gore

Christopher Green

Cassandra Grove

Shannon Hammons

Pam Hiebert

Angela Johnson

G. Michael Johnson

Cecelia Jones

Ella Jones

Heather Kennedy

Melissa Lesiewicz

Jeannie Lybbert

Dawn Lyons

Janet McGlothorn

David Nelson

Donald Oakes

Wanda Pickens

Tyler Pruett

Melissa Rose

Michael Ruggless

Chad Sartini

Shauna Savage

Dennis Schroeder

Mandy Slowinski

Mary Snow

Jeneé Snyder

Victor Soe

Robert Springall

Diana Strom

Jessica Swedberg

Robert Teplitz

Gregory Thornburg

Jody Walker

Tracey Wassel

Scott Whitlock

Michael Williams



Blondeen Philamond: 2014

### Gold Level: \$100 to \$499

Hellen Baker-Smith

Cindy Butler

Susan Dale

Julie Lindenmeier

Lisanne Masterson

New Hampshire  
Association of  
Student Financial Aid  
Administrators

Charlotte Elier: 2013



Margot O'Meara: 2012



# my five favorite nasfaa projects as the 2018 dme intern

by McCall Hopkin

I came to NASFAA with a brief background in higher education policy and an interest in student finance, but I started my first day feeling like I had a lot to learn. Now, after four months, I'm leaving this experience with a solid understanding of federal student aid programs, how they run, and who they serve. I can't wait to stay involved with NASFAA's work moving forward. Below I've listed five of my favorite (and most challenging!) project areas as NASFAA's 2018 DME Policy Intern.

## 1. 2018 State of Student Aid Briefing

In my view, working with the policy team on the 2018 National Student Aid Profile was my most meaningful contribution to this internship. I helped finalize data in the profile, built presentation slides around the data, and even got to present for a few minutes during the briefing on Capitol Hill. I learned volumes about the individual student aid programs and felt proud of the work we accomplished.

## 2. NASFAA National Conference

I had never travelled for work before, so I felt like a major grownup when I learned I'd be attending NASFAA's 2018 National Conference in Austin. Though each session was both fascinating and instructive, for me the most memorable sessions were those in which administrators were able to engage directly with congressional staff. And I could not get over how close we were to where President Lyndon B. Johnson signed the Higher Education Act in 1965. I made sure to stop by LBJ's Presidential Library and Museum before leaving Austin to tie a bow around the whole experience.

## 3. Higher Education Committee of 50

I was lucky to sit in on a handful of calls related to the Higher Education Committee of 50, an exciting, NASFAA-led grant project. As a policy student, I found this invaluable exposure to such a wide swath of institutional leaders. It was amazing to see, in real time, their ability to groupthink, problem-solve, and compile recommendations around some of the most



important issues in higher education. On occasion, I had the chance to conduct background research and deliver materials for various committee subgroups, which was an incredible learning opportunity.

## 4. Federal Relations and Advocacy

One of the main reasons I took this internship was NASFAA's presence on Capitol Hill. I had been exposed to NASFAA's policy work before and was consistently impressed with their legislative presence and refined advocacy strategy. It was exciting to learn how that operation works in practice and to take a stab at reviewing, summarizing, and analyzing legislation myself. I now better understand the intricacies of statutory language, how budget and appropriations processes work, and what effective non-partisan advocacy looks like.

## 5. Dallas Martin Endowment (DME) Policy Intern Blog

I didn't expect to enjoy the DME weekly blogging assignment so much, but it was such a joy to look back on each week and be able to write about everything I was learning. I valued the opportunity to write reflectively and informally on a regular basis—in many ways I think it made me a better writer.

# nasfaa volunteers

more than 500 volunteers are a crucial ingredient in nasfaa's success

Free time? Most busy financial aid professionals have never heard of it. But despite overwhelming competing commitments, hundreds of NASFAA members dedicate their time, energy and ideas each year to support NASFAA's mission and objectives. NASFAA's volunteers are essential to our work, bringing in-the-field knowledge and expertise to the association's actions and decision-making. To every individual who spent their time this year serving on a NASFAA task force, committee, working group, governing board, or editorial board—*THANK YOU!*

To those interested in volunteering in the future, visit [https://www.nasfaa.org/Get\\_Involved](https://www.nasfaa.org/Get_Involved) to learn more.



## Advocacy Pipeline

Allen, Katherine - University of Michigan-Dearborn

Basballe, Kristin - University of Minnesota, Twin Cities

Blackmon, David - Yale University School of Art

Boling, Gena - University of Missouri

Burke, Brenda - University of Utah

Cummings, Deidra - Lipscomb University

Davenport, LeChelle - University of Tennessee Health Science Center

Dixon, Brian - Washington State University

Gill, Jason - Garrett-Evangelical Theological Seminary

Herr, Elijah - Lane Community College

Hunter-Goldsworthy, Heidi - University of North Carolina at Chapel Hill

Johnson, Marie - University of Vermont

Kannenwischer, Susan - Capital University

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