

NASFAA NOW

YOUR ASSOCIATION - GROWING, CHANGING, EVOLVING

ANNUAL IMPACT REPORT

2014-15

After nearly 50 years of providing training, education, and advocacy, NASFAA remains the ultimate source for financial aid professionals in their quest to remove the financial barriers to higher education.



NASFAA

NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS



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Our Mission

The National Association of Student Financial Aid Administrators (NASFAA) provides professional development for financial aid administrators; advocates for public policies that increase student access and success; serves as a forum on student financial aid issues, and is committed to diversity throughout all activities.

NASFAA is the largest postsecondary education association with institutional membership in Washington, D.C., and the only national association with a primary focus on student aid legislation, regulatory analysis, and training for financial aid administrators in all sectors of post-secondary education. No other national association serves the needs of the financial aid community better or more effectively.





NASFAA Code of Conduct

NASFAA's Code outlines the mandatory professional conduct and set of behaviors expected of members. Subject to enforcement procedures that went into effect July 1, 2015, institutional members of NASFAA will ensure that:

1. No action will be taken by financial aid staff that is for their personal benefit or could be perceived to be a conflict of interest.
 - a) Employees within the financial aid office will not award aid to themselves or their immediate family members. Staff will reserve this task to an institutionally designated person, to avoid the appearance of a conflict of interest.
 - b) If a preferred lender list is provided, it will be compiled without prejudice and for the sole benefit of the students attending the institution. The information included about lenders and loan terms will be transparent, complete, and accurate. The complete process through which preferred lenders are selected will be fully and publically disclosed. Borrowers will not be auto-assigned to any particular lender.
 - c) A borrower's choice of a lender will not be denied, impeded, or unnecessarily delayed by the institution, even if that lender is not included on the institution's preferred lender list.
 - d) No amount of cash, gift, or benefit in excess of a de minimis amount shall be accepted by a financial aid staff member from any financial aid applicant (or his/her family), or from any entity doing business with or seeking to do business with the institution (including service on advisory committees or boards beyond reimbursement for reasonable expenses directly associated with such service).
2. Information provided by the financial aid office is accurate, unbiased, and does not reflect preference arising from actual or potential personal gain.
3. Institutional award notifications and/or other institutionally provided materials shall include the following:
 - a) A breakdown of individual components of the institution's Cost of Attendance, designating all potential billable charges.
 - b) Clear identification of each award, indicating type of aid, i.e. gift aid (grant, scholarship), work, or loan.
 - c) Standard terminology and definitions, using NASFAA's glossary of award letter terms.
 - d) Renewal requirements for each award.
4. All required consumer information is displayed in a prominent location on the institutional web site(s) and in any printed materials, easily identified and found, and labeled as "Consumer Information."
5. Financial aid professionals will disclose to their institution any involvement, interest in, or potential conflict of interest with any entity with which the institution has a business relationship.

See the Statement of Ethical Principles on the following page and www.nasfaa.org/Ethics for more information on NASFAA's ethical guidelines and how they are enforced.

To report a potential violation of NASFAA's Code of Conduct, refer to the Ethics Complaint Submission Form.



Statement of Ethical Principles

The primary goal of the financial aid professional is to help students achieve their educational goals through financial support and resources. NASFAA's Statement of Ethical Principles is aspirational and serves as a set of guiding policies and behaviors. The following guidelines were last updated by NASFAA's Board of Directors in March 2014.

We, financial aid professionals, declare our commitment to the following Statement of Ethical Principles. Financial aid administrators shall:

Advocate for students

- Remain aware of issues affecting students and continually advocate for their interests at the institutional, state and federal levels.
- Support federal, state and institutional efforts to encourage students, as early as the elementary grades, to aspire to and plan for education beyond high school.

Manifest the highest level of integrity

- Commit to the highest level of ethical behavior and refrain from conflict of interest or the perception thereof.
- Deal with others honestly and fairly, abiding by our commitments and always acting in a manner that merits the trust and confidence others have placed in us.
- Protect the privacy of individual student financial records.
- Promote the free expression of ideas and opinions, and foster respect for diverse viewpoints within the profession.

Support student access and success

- Commit to removing financial barriers for those who want to pursue postsecondary learning, and support each student admitted to our institution.
- Without charge, assist students in applying for financial aid funds.
- Provide services and apply principles that do not discriminate on the basis of race, gender, ethnicity, sexual orientation, religion, disability, age, or economic status.
- Understand the need for financial education and commit to educate students and families on how to responsibly manage expenses and debt.

Comply with federal and state laws

- Adhere to all applicable laws and regulations governing federal, state, and institutional financial aid programs.
- Actively participate in ongoing professional development and continuing education programs to ensure ample understanding of statutes, regulations, and best practices governing the financial aid programs.

- Encourage colleagues to participate in the financial aid professional associations available to them at the state, regional, or national level and offer assistance to other aid professionals as needed.

Strive for transparency and clarity

- Provide our students and parents with the information they need to make good decisions about attending and paying for college.
- Educate students and families through quality information that is consumer-tested when possible. This includes (but is not limited to) transparency and full disclosure on award notices.
- Ensure equity by applying all need-analysis formulas consistently across the institution's full population of student financial aid applicants.
- Inform institutions, students, and parents of any changes in financial aid programs that could affect their student aid eligibility.

Protect the privacy of financial aid applicants

- Ensure that student and parent private information provided to the financial aid office by financial aid applicants is protected in accordance with all state and federal statutes and regulations, including FERPA and the Higher Education Act, Section 483(a)(3)(E) (20 U.S.C. 1090).
- Protect the information on the FAFSA from inappropriate use by ensuring that this information is only used for the application, award, and administration of aid awarded under Title IV of the Higher Education Act, state aid, or aid awarded by eligible institutions.

Refer to NASFAA's the Code of Conduct on the previous page and www.nasfaa.org/Ethics for more information on NASFAA's ethical guidelines and how they are enforced.

REMOVE THE RISK

risk



NASFAA's Standards of Excellence Review Program helps remove the risk of compliance issues for your Title IV programs.

Program Benefits:

- Improved customer service to your students
- Confidential, unbiased review
- Completed by credible peers in the higher education profession
- Ability to obtain quick and confidential guidance from ED, when needed
- No fines or published findings
- Resources provided to ensure continued compliance
- Tailored to the specific needs of your institution

For more information, contact
Ashley Reich, SOE Program Coordinator
at Excellence@nasfaa.org or (202) 785-6963.



A Letter from The National Chair

Dear Colleagues:

Thank you. Because of your support, I have spent the past academic year as your National Chair—an experience that has proven to be one of the most rewarding of my 31-year career in financial aid.



I have had the opportunity to see the commitment and energy of our Washington, D.C. staff, from Justin Draeger, our president and CEO, to reporter Brittany Hackett, trainer David Futrell, and office administrator Stephan Schiavone. Indeed, all NASFAA employees—senior administration and support staff alike—work tirelessly and enthusiastically so that we financial aid administrators have the information, training, and insights that help us to do what we do in the best manner possible. I thank each of them for their daily commitment to NASFAA's mission.

It is not just the D.C. staff members who make NASFAA strong, it is the aid administrators who comprise the ranks of our membership. Those of you who serve on the Board of Directors, who volunteer for the various task forces, who present at our national conference, who answer surveys and provide feedback—your participation gives NASFAA the grassroots credibility that resonates with legislators and policymakers.

One of the highlights of my year as chair has been the opportunity to meet many of you at your state and regional conferences, where I was constantly impressed with your fervor and your good works on behalf of students. And while I have seen your commitment and heard your stories, I also know personally how discouraged we can feel when overwhelmed by excessive regulations, unreasonable workloads, and unrelenting demands on our time and resources.

But I would like to tell you a story that highlights for me why we do what we do, in spite of such challenges:

A prospective student came to speak with me at an open house event this past spring. He did not come with a parent as most of our traditional-age students do. This high school senior came alone, sheepishly sat down in my office, and simply asked, "How can I afford to come to this, my dream school?" I looked at the aid package he had received and knew that it was insufficient for his needs. But instead of turning him away, I decided to use the scarce resources remaining at my disposal to provide him with the funding he needed to attend. His response to the news that he would be able to attend his dream school was underwhelming, to say the least—he said very little. As I quietly stood to shepherd him out of my office, personally disappointed at his reaction, he turned and said, "Can I please give you a hug?"

I can tell you, that hug was the best ever, and it reminded me emphatically of why I love my job in spite of those discouragements we all endure. I know that each of you have these transcending moments as well. I urge you to keep them close to your heart and let their warmth bring you through those difficult times.

I thank each of you for your service – to NASFAA and to our country, as you work daily to provide access to those who dream of a higher education. Your work truly brings to life Thomas Jefferson's belief that an educated citizenry is essential to a successful democracy.

Sincerely,

Eileen K. O'Leary
Eileen K. O'Leary
2014-15 NASFAA National Chair

A Letter from the President

Dear NASFAA Board and Members:

With the approach of reauthorization of the Higher Education Act (yes, finally!), NASFAA significantly ramped up our policy and advocacy efforts in 2014-15. If you've heard me speak recently, you have likely heard me discuss a concept to which NASFAA is committed: When it comes to student aid policy, we'd always prefer to "be at the table, instead of on the menu."



In order to remain at the table and engaged with policymakers on key discussions, NASFAA leverages the knowledge and experience of our members in the field. This year, NASFAA continued our proactive public policy efforts through the release of several policy-related task force reports and associated recommendations. The task force model allows NASFAA to identify and anticipate student aid policy issues that are percolating on Capitol Hill, engage members, and make sure our policy recommendations are heard by those who can make them a reality.

Some of the topics addressed through task forces this year include how to

- Best address and improve student loan servicing issues
- Modernize and prepare financial aid to match innovative learning models
- Simplify and revamp return of Title IV funds
- Simplify the FAFSA for the neediest students while retaining and even improving program integrity

We've made progress on many of our recommendations, but there is one particular policy position we saw take on a life of its own late this year. The FAFSA Working Group recommended the use of prior-prior year (PPY) income data to determine student aid eligibility, supporting a position NASFAA has strongly advocated for over many years. I am proud to report that in late summer 2015, NASFAA received a call from the White House letting us know our recommendation would be enacted via executive action. If you ever need an example of how powerful the collective voice of the financial aid community

can be, look no further than PPY. This change--which will provide hundreds of thousands of students with better and earlier financial aid information--is the direct result of our collective advocacy efforts!

Throughout this Annual Impact Report, you will find many other examples of how your national association is working on your behalf. We've significantly scaled-up our training offerings via NASFAA University (to date, your colleagues have earned nearly 1,400 credentials), and we continue to focus on research and development of new product offerings that add value to your membership.

I'll leave you with this parting thought: Celebrate the work you do, because it changes lives for the better. Together we are opening the doors of education and leveling the playing field for underserved students. Whether on campus, on Capitol Hill, at the White House, or in the press, we cannot rest until we finally achieve the great ideal that no qualified student be denied the chance to attend and succeed in postsecondary education.

Thank you for all you do for students and families.

Sincerely,

A handwritten signature in blue ink, appearing to read "Justin S. Draeger". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Justin S. Draeger
NASFAA President & CEO



GOVERNANCE





The Vision to Grow

In 2014-15, NASFAA's Board of Directors, under the leadership of Chair Eileen O'Leary, charged the Association Governance Committee (AGC) with reviewing progress to date on the first year of NASFAA's three-year Strategic Long-Range Plan (SLRP) for 2014-17. "I'm pleased to report that, just one year in, NASFAA's staff, task forces, and standing committees have made significant progress toward the attainment of many goals set forth in our three-year strategic plan," said 2014-15 AGC Chair Ron Day. "While there is still work to be done, we've made excellent strides in advancing the goals of NASFAA's strategic vision."

The following describe some examples of progress under each strategic goal:

Lead, cultivate, and encourage the development of public policies that support postsecondary education.

- Internal advocacy efforts, combined with utilization of NASFAA members' expertise through seven Advocacy Pipelines and six policy-related task forces, have led to requests for NASFAA to help inform pending legislation and the inclusion of NASFAA's key policy positions—on use of prior-year tax data, year-round Pell, and authority to limit loan amounts—in draft reauthorization bills. Beyond direct work on Capitol Hill, policy staff have engaged with the broader higher education community by hosting two policy forums and attending no less than 10 external events each month. All told, the number of Hill staff, media, and association colleagues that call upon NASFAA to lead and provide guidance on student aid issues has increased over the last year.

Ensure all Association activities fall within the scope of the Board-approved mission and vision statements and represent the best use of time and resources.

- This year, NASFAA leadership completed a Products and Services Evaluation Matrix, which imparts a forced ranking upon our suite of offerings in categories such as Product Lifecycle, Usage, Financial Result/Potential, etc. Leadership used the results of this evaluation to develop a strategy for product investment and development.
- All products and services are being developed and maintained in alignment with our budget. NASFAA has exceeded revenue projections in each functional area and is keeping expenses within budget parameters. As needed, excess revenues have allowed the Association to more rapidly expand certain products and services like the Student Aid Index, the in-development Compliance Engine (see page 32), and policy initiatives.

- A brand new, improved NASFAA.org and Today's News e-newsletter launched in July. Along with a sleek and updated look and feel, the new site is mobile responsive, easier to navigate and search, and customizable to user preferences.

Promote NASFAA as the trusted, recognized leader in the professional development of financial aid administrators.

- The 2015 Leadership & Legislative Conference & Expo provided a new, second track offering new and aspiring aid directors the opportunity for leadership growth.
- Webinars covered topics appropriate to all sectors and covered instances of non-term and module setups, as well as standard-term programs.
- The number of NASFAA University credentials offered has continued to grow via online courses, Self-study Guides, and boot camps/conference events.

Assess and address, as needed, the perception of financial aid professionals among various stakeholders.

- With the goal of broadening understanding of and respect for the profession, NASFAA developed a one-pager for college presidents and Hill staff that outlines what financial aid administrators do.
- NASFAA made strides to promote the diversity of the financial aid profession via the adoption of a new volunteer role—the NASFAA Diversity Officer. The concept of a NASFAA diversity officer grew from the work of the 2014-15 Professional Diversity Caucus. The diversity officer will be responsible for guiding NASFAA's efforts to conceptualize, define, assess, nurture, and cultivate diversity as an institutional and educational

resource. This individual is responsible for monitoring the SLRP for diversity-building opportunities, providing key input to the board on issues related to diversity, and reporting on these efforts to the membership.

- Staff explored the furtherance of credentialing and possible certification as a means for individuals to enhance their professionalism via development of a “credentialing to certification” timeline and the inclusion of credentialing in the NASFAA career center.
- NASFAA also increased awareness of and adherence to the Board-approved Code of Conduct among the membership. The Association accomplished this through an updated Ethics web area (www.nasfaa.org/ethics), the publication of eight ethics-related original columns in Today’s News, and a free-to-all-members webinar on ethics, among other efforts.

Ensure the effective and strategic use of technology across all Association activities.

- NASFAA successfully overhauled and redeveloped our website and newsletter on time and on budget.
- Staff continued the research and development of the Compliance Engine (see p. 32), a web-based product that brings the current (PDF-based) Self-Evaluation Guide and Policies and Procedures Tools into a customizable, savable, and exportable online format.
- To increase the level of data staff collected about member use of products, staff instituted online product tracking via the NASFAA store.

The 2014-15 NASFAA Board of Directors Officers

National Chair: Eileen O’Leary, Stonehill College

Chair Elect: Daniel Mann, University of Illinois at Urbana - Champaign

Past Chair: Ron Day, Kennesaw State University

Treasurer: Lori Vedder, University of Michigan - Flint

Regional Representatives

WASFAA : Frank Green, Travel Institute of the Pacific

EASFAA : Brian Lemma, Georgetown University

MASFAA: Sara Beth Holman, Lawrence University

SASFAA: Zita Barree, Hampden-Sydney College

SWASFAA: Andrew Hammontree, Francis Tuttle Technology Center

RNASFAA: Jeff Jacobs, North Dakota State University

Representatives at Large

Rep At Large (1st year) : Paula Luff, DePaul University

Rep At Large (1st year) : Craig Slaughter, Depauw University

Rep At Large (1st year) : Heather Boutell, Bellarmine University

Rep At Large (2nd year): Lisanne Masterson, Blue Ridge Community College

Rep At Large (2nd year): Neville Brown, Eastern Connecticut State University

Rep At Large (2nd year): S. Kay Lewis, University of Washington

Commission Directors

Susan Murphy, University of San Francisco

David Page, Dillard University

Margaret Rodriguez, University of Michigan

Ex-officio

President: Justin Draeger, NASFAA

Board Secretary: Beth Maglione, NASFAA

Chief Financial Officer: Mitchell Weintraub, NASFAA





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Janet Deak

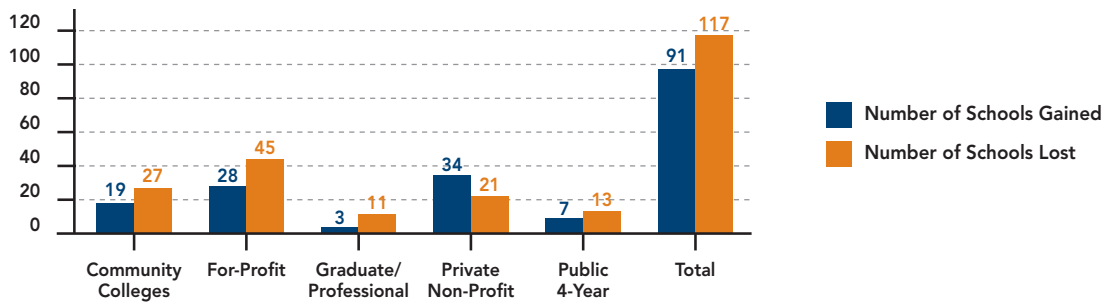
MEMBERSHIP

Leveling Off

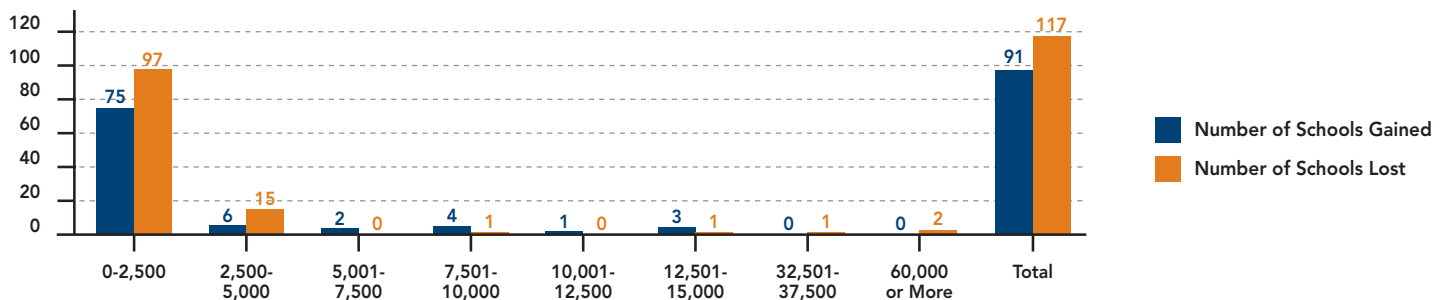
After years of strong growth, NASFAA membership numbers have reached record levels. Today, nine out of 10 undergraduates are served by NASFAA member institutions. With a retention rate of 95.5 percent, NASFAA remains well above the industry average for both trade and individual membership organizations.

NASFAA membership numbers are fluctuating slightly, largely due to larger market forces that have led to some institutional closures and consolidations. The majority of school closures and membership loss came from the for-profit, small school (less than 2,500 students) sector. After controlling for consolidations, NASFAA experienced a net increase in members in the private non-profit sector.

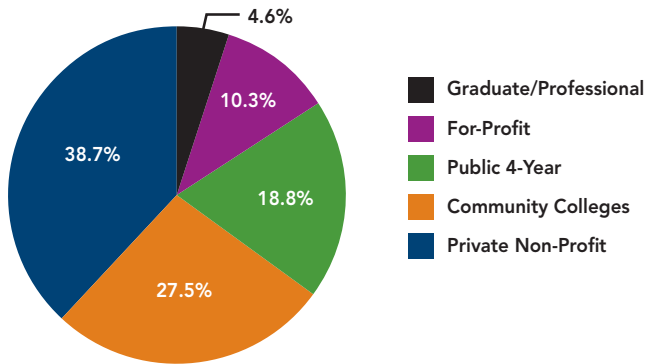
Institutions Gained/Lost, by Sector



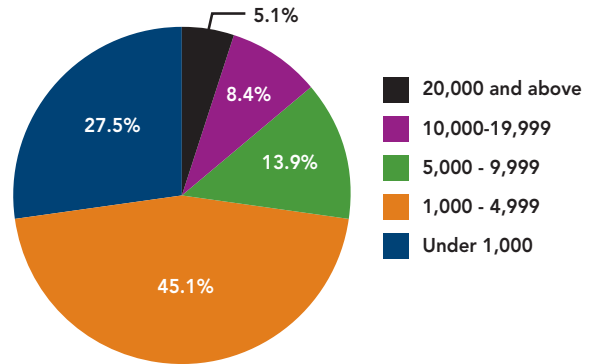
Institutions Gained/Lost, by Full-Time Equivalent (FTE) Students



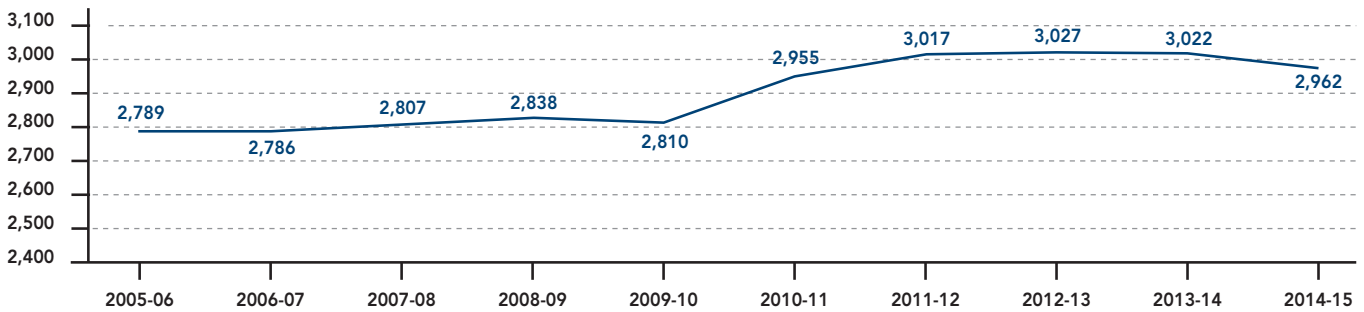
NASFAA Members, by Sector



NASFAA Members, by Institution Size



Total Institutional Members (Adjusted to Include System Memberships)



Note: 2014-15 saw the closure and consolidation of a number of institutions nationwide.

Movers & Shakers

Whether moving up the ladder at their current school, taking on new challenges at a different institution, or retiring to head in a new direction, these are some of the NASFAA members who took big steps into new roles in the past year.



Grand Canyon University promoted **Chris Arnold** to assistant vice president from his previous role as executive director. Chris has dedicated 17 years to service in student financial aid.

Kimberly Brown is now vice president, enrollment management & student affairs for Des Moines University. She has served in financial aid for 23 years and previously served as university director of finance for Midwestern University.

Justin Chase Brown, former associate director of student financial aid for the University of Missouri, is now director of scholarships and financial aid for the University of Nebraska-Lincoln. He also recently published a book review in NASFAA's Journal of Student Financial Aid.

Jay Comstock is now assistant director of financial aid for Hamline University. Previously, he served as student finance officer for Rasmussen College. Jay has worked in financial aid for nine years.



Grand Canyon University promoted **Danielle Cornell** to associate director, financial aid from her prior role as financial aid manager. Danielle has served in student aid for six years.

Darcey Cospser is now senior financial aid counselor for the University of West Florida. Darcey previously served as financial aid counselor for Spring Hill College, and has worked in financial aid for two years.

Eric DeRise became financial aid program administrator for the Culinary Institute of America. Eric formerly served as a financial aid advisor for Ridley-Lowell Business & Technical Institute.



Vanderbilt University promoted **Karen Hauser** to associate director of student financial aid and scholarships in August 2014. Karen has served in student aid for more than 20 years. In May 2015, she completed a rigorous 30-week program to earn a certificate in Leadership in Enrollment Management from University of Southern California.

G. Michael Johnson, former director of financial aid for Pacific University, is now director of financial aid and scholarships for Portland State University. Michael has served the student aid profession for 28 years.

Sarah Kasabian-Larson, former financial aid counselor for Adrian College, is now assistant director of financial aid for Alma College. Sarah has worked in financial aid for four years.

Clemson University promoted **Chuck Knepfle** to associate vice president for enrollment management from his former position of director of financial aid. Chuck has served in student aid for 19 years.

Heidi Kovalick is now associate director-compliance for Rowan University. Heidi previously worked as an institution review specialist, program compliance for the U.S. Department of Education. She has dedicated 25 years of service to the financial aid profession.

Friends University promoted **Tony Lubbers** to director of financial aid from his role as assistant director. Tony has served in student aid for 19 years, and attributes his promotion directly to his participation in his state and regional associations, as well as NASFAA. He says, "I am grateful to all of these organizations for the opportunity to serve and make a difference."

Stevenson University promoted **Barbara L. Miller** to assistant vice president from her former position as director of financial aid.

Top to bottom: Chris Arnold, Kimberly Brown, Justin Chase Brown, Danielle Cornell

Martin Reba is now director of financial aid for North Central College. He has served in financial aid for seven years and is the former associate director of financial aid processing for the Art Institute of Chicago.

Sauk Valley Community College promoted **Jennifer Schultz** to financial assistance director from her previous position of financial assistance coordinator. Jennifer has served in student aid for nine years.

Jessica Sherry received a promotion from executive financial aid specialist to training specialist at Grand Canyon University. She has served in student aid for six years.

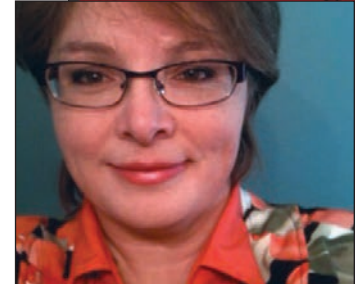
Central Carolina Technical College promoted **Jernitha Smith** to financial aid technical services manager from her previous role as financial aid counselor – state aid & scholarships. Jernitha has served in student aid for one year.

Charlotte Sorg, former director of financial aid for South Carolina State University is now director of financial aid and veterans assistance for Trident Technical College. Charlotte has committed 17 years to student aid service.

Gary Spoales has been promoted to vice president of student financial aid for the American Public University System. Gary has dedicated 41 years to service in the student aid profession.

The University of Texas at Austin promoted **Diane Sprague** to director of financial aid. Diane has dedicated 27 years to service in the field of student financial aid.

Samantha Veeder is now executive director of financial aid and scholarship programs for Syracuse University. She is the former director of financial aid for Nazareth College and has served in the financial aid profession for 23 years.



Spotlight on ... Elizabeth (Betsy) Hicks



After 45 years of leadership and service in student aid, Elizabeth (Betsy) Hicks retired from her role as executive director at Massachusetts Institute of Technology (MIT). Hicks' financial aid career began in the fall 1970, when she became assistant to the director of financial aid at Radcliffe College. Radcliffe merged its admissions and financial aid operations with Harvard University in 1975, where Hicks continued to work until 1995 when she was appointed U.S. Department of Education (ED) deputy assistant secretary for student financial assistance programs.

Upon leaving ED in 1998, Hicks accepted a position at Harvard's Kennedy School of Government in Executive Programs. In 2000, she joined MIT as the executive director of student financial services. In an MIT News article announcing Hicks' selection at the time, Rosalind H. Williams, then dean of students and undergraduate education for MIT, wrote

"Betsy has a national reputation in student financial assistance, most notably from her service as deputy assistant secretary for student financial assistance programs with the US Department of Education from 1995-98. She guided those programs through an extraordinarily difficult era of internal and external changes, emerging with a reputation for strong, fair leadership. No prior political appointee served in this position longer than six months."

Beyond her work for ED and at the university level, Hicks also served as an advisor to Sen. Edward Kennedy (D-MA) and his staff on a number of higher education initiatives, including the Federal Direct Student Loan Program.

She served as a member of the Clinton-Gore transition team in 1992 and as a primary negotiator on numerous negotiated rulemaking sessions with ED. At the association level, Hicks served as the president of the Massachusetts Association of Student Financial Aid Administrators (MASFAA) in 1993-94 and as a member of the board of the Eastern Association of Student Financial Aid Administrators (EASFAA) in 1994-95. Her involvement with NASFAA spans nearly 40 years.

"I take pride in the fact that I have helped ensure success and affordability to higher education, not just at the higher education institutions where I served," Hicks said. And while she will miss "the vibrancy of a university campus," Hicks is looking forward to her retirement in Cape Cod, Massachusetts, and spending time with her husband, two children, and six grandchildren.



Recent Retirements

Tracey Duke retired from the University of Oklahoma as associate director, special programs and compliance, on August 1, 2015. Tracey has dedicated 33 years of service to student financial aid.

Susan Fischer announced her retirement from the University of Wisconsin-Madison after more than 32 years of committed service in student aid.

Elizabeth (Betsy) Hicks retired as executive director of student financial services at Massachusetts Institute of Technology on August 31, 2015. Betsy has dedicated 45 years of service to the student aid profession. (See the Spotlight on Betsy Hicks on the previous page.)

Nancy LaMotta retired from her position as associate director of financial aid for the George Washington University Law School after 37 years of dedicated service in student aid.

Richard Toomey announced his plans to retire as dean of university financial aid services in January 2016 after 42 years at Santa Clara University. "I'm hanging up my FAFSA and moving on to greener (grayer?) pastures," he said. "I owe a huge debt of gratitude to all of my NASFAA colleagues who, over the years, were always ready to reach out a helping hand. Keep up your irreplaceable work!"

Awards and Recognition

Ajana Wilkinson, now assistant director for Kingsborough Community College, has served in student aid for six years and earned NYSFAAA's 2014 Rising Star Award during her service as financial aid counselor for Molloy College.

Previous page, top to bottom: Tracey Duke, Tony Lubbers, Heidi Kovalick.

This page, top to bottom, left: Samantha Veeder, Martin Reba, Gary Spoales, Jessica Sherry, Karen Hauser, Jay Comstock.

This page, top to bottom, right: Jennifer Schultz, Michael Johnson, Chuck Knepfle, Sarah Kasabian-Larson, Nancy LaMotta, Ajana Wilkinson.



NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
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NASFAA NATIONAL CONFERENCE
JULY 19-22
Hyatt Regency New Orleans


NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
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CONFERENCES



Knowledge and Networking: The National Conference

NASFAA marched into New Orleans—complete with brass bands and a 50th anniversary kick-off parade—for its National Conference from July 19-22, 2015.

Every year, the NASFAA conference offers an information-rich forum where financial aid professionals nationwide meet to receive federal updates, share best practices, network, and pursue new levels of professional excellence. This year's conference featured a keynote address by "CSI: NY" star Hill Harper, who established Manifest Your Destiny Foundation to provide scholarships to underserved youth.

Conference attendees also experienced, and took part in, an intriguing, Oxford-style debate among leaders in higher education and economics—"Yes or No? Student Loans Are a Crisis for Students and the Economy"—which presented several perspectives on this critical, complex issue. During the debate, NASFAA members expressed their views on the topic through a real-time voting system.

Conference interest sessions moved from a format of one hour and 15 minutes to a more concise, one-hour length for 2015. The Conference Program Task Force and staff based this decision on research conducted widely across the association industry regarding adult learning styles. Attendees gave the change high marks as they chose from among nearly 100 noteworthy sessions presented by the U.S. Department of Education, financial aid office peers, and other experts.

Data from New Orleans show a small decrease in total registrants over the prior year due to slightly lower participation levels by both NASFAA Institutional and Associate members. At least one state had travel restrictions, reducing the number of participants from that state. The total percentage of member institutions represented at the conference decreased slightly in 2015.

National Conference Registration

	2011 Boston	2012 Chicago	2013 Las Vegas	2014 Nashville	2015 New Orleans
Total Number of Registrants	2,359	2,513	2,444	2,267	2,149
Percentage of Total Registrants from Institutions	74%	75%	76%	74%	75.9%
Percentage of NASFAA's Total Associate Members (NASFAA Business Partners) Represented at the Conference	69.4%	58.9%	57.7%	47.7%	45.1%
Percentage of NASFAA's Institutional Members Represented at the Conference	28.7%	30.2%	30.2%	31.4%	27.5%

National Conference Programming

	2011 Boston	2012 Chicago	2013 Las Vegas	2014 Nashville	2015 New Orleans
Number of Interest Sessions	135	129	161	102	97
Number of Tracks	13	15	13	6	6
Number of Presenters and Moderators	375+	360+	440+	200+	370

Taking Charge: NASFAA's Leadership & Legislative Conference & Expo

Since 1971, NASFAA's leadership conference has offered intensive, in-person preparation for our members who hold or are about to assume leadership positions. While the conference name and content have changed and expanded over the years, the purpose of the conference remains the same: to deliver knowledge, perspectives, and insights into management issues facing current and future financial aid leaders.

The 2015 Leadership & Legislative Conference & Expo participants met at the Washington Marriott Georgetown in Washington, D.C., from March 1-3, 2015. This year, NASFAA expanded the conference by offering two pathways, more than doubling the number of members able to take advantage of this event while allowing attendees to concentrate on their chosen topics for two and a half days. The *New & Aspiring Aid Directors Pathway* targeted management skills and running a financial aid office efficiently. The *Association Management Pathway* targeted rising leaders and those interested in becoming a future leader at the state, regional, or national association level.

Leadership & Legislative Conference Attendance

	Number of Registrants	Number of States Represented
March 2011	60	30
March 2012	75	39
March 2013	82	38
March 2014	88	42
March 2015	195*	38**

*2nd track introduced

**Represented at Associate Management Pathway

Number of 2015 Registrants by Pathway

Pathway	Paid Registrants
Association Management	75
New & Aspiring Aid Directors	81



Each year, NASFAA schedules Capitol Hill visits as part of its Leadership & Legislative Conference. This year, 130 of the 195 participants made Hill visits, (required for the Association Management Pathway and optional for the New & Aspiring Aid Directors Pathway) to advocate directly with their congressional delegation on behalf of their students. Participants prepared for their Hill visits by viewing NASFAA's January 2015 webinar, "Maximizing Your Hill Visit," which offers guidance on steps to take before coming to D.C. to meet with representatives, current topics and issues to consider, and what to expect during the visit.



La Crème de la Crème Celebrated in New Orleans: The NASFAA Awards

The announcement of NASFAA's annual awards is a highlight of every NASFAA conference. Each year, NASFAA honors members and others—selected by the Awards Committee and ratified by the Board of Directors—with awards recognizing their extraordinary contributions in the field of financial aid. NASFAA honored the following individuals at the July 2015 conference.

The Allan W. Purdy Distinguished Service Award: One of the highest honors bestowed by NASFAA, this award is given either for significant contributions in the furtherance of NASFAA's goals over a sustained period of time or for a single contribution of momentous importance.

- **Eileen O'Leary**, assistant vice president of student financial services, Stonehill College, for her service as 2014-15 NASFAA national chair and her strong advocacy for rigorous professional ethics in the profession.
- **Dr. Patricia Hurley**, associate dean, Glendale Community College, for a career of service promoting, advocating, and mentoring financial aid professionals and their interests at the state, regional, and national levels.

Meritorious Achievement Award: The Meritorious Achievement Award is presented to an individual who has made either an important single contribution to NASFAA or the profession, or significant multiple contributions.

- **Connie McCormick**, NASFAA's former chief training officer, in recognition of her years of influential service to NASFAA members developing training materials of the highest quality.

Golden Quill Award: The Robert P. Huff Golden Quill Award is presented to individuals chosen for their contributions to the body of research on student financial aid.

- **Dr. Jacob P. K. Gross**, assistant professor at the University of Louisville, for his contributions to knowledge surrounding student aid issues through multiple research studies, as well as his service as the editor of NASFAA's Journal of Student Financial Aid.





Previous page:

Top: NASFAA honors Dr. Patricia Hurley with the Allan W. Purdy Distinguished Service Award.

Bottom: Eileen O'Leary accepts the Allan W. Purdy Distinguished Service Award. Also shown (l to r) are 2012-13 National Chair Ron Day, NASFAA President Justin Draeger, and 2015-16 National Chair Dan Mann (far right).

This page:

Top: Dr. Jacob P. K. Gross accepts the Robert P. Huff Golden Quill Award.

Center: Representatives from the University of California accept the Gold Star Award - Honorable Mention.

Bottom: Connie McCormick is honored with the Meritorious Achievement Award.

Next page:

Top: Representatives from the University of Oklahoma accept the Gold Star Award.

Bottom: A representative from PASFAA accepts the Gold Star Award - Honorable Mention.



- **Dr. Stephen DesJardins**, professor of education at the University of Michigan, for high-quality, rigorous research on student financial aid for more than 25 years.

Regional Leadership Awards: These awards recognize individuals who exhibit high integrity and character, have shown creative leadership, and have inspired and encouraged others to actively participate in professional development.

EASFAA – Larry Chambers, director of financial aid, Rensselaer Polytechnic Institute

MASFAA – Richard Shipman, director of financial aid, Michigan State University

RMASFAA – Sharon Kienow, financial aid director, Northern State University

SASFAA – Brad Barnett, senior associate director, James Madison University

SWASFAA – Lisa Hopper, director of financial aid, National Park Community College

WASFAA – Sandra Guidry, awards/special projects coordinator, University of Nevada – Reno

Gold Star Award: This award recognizes innovative ideas in the financial aid arena at any level and with any constituency.

Winner: **The University of Oklahoma**, for The Nine Things Every College Student Should Know about Money. This course helps students understand personal finance and how current financial decisions will impact their lives going forward.

Honorable Mention: **Pennsylvania Association of Student Financial Aid Administrators (PASFAA)**, for nextPAGE, PASFAA's

Advancement of Generations Exchange. Created to empower the next generation of financial aid administrators, nextPAGE gives financial aid administrators with less than 10 years' experience the tools to grow and succeed in financial aid and to build a strong network.

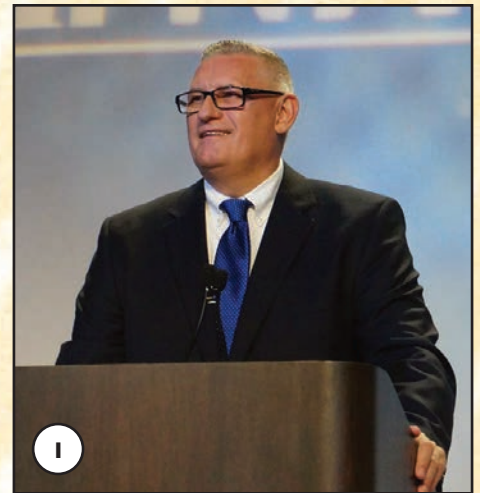
Honorable Mention: **University of California, Santa Barbara**, for the University of California (UC) Financial Aid Leadership Institute. This program prepared the UC system for a large predicted loss of experience and institutional knowledge in the financial aid office and elsewhere on campus.



NASFAA COMES MARCHING IN: THE 2015



new orleans
2015
NASFAA National conference
JULY 19-22, Hyatt Regency New Orleans



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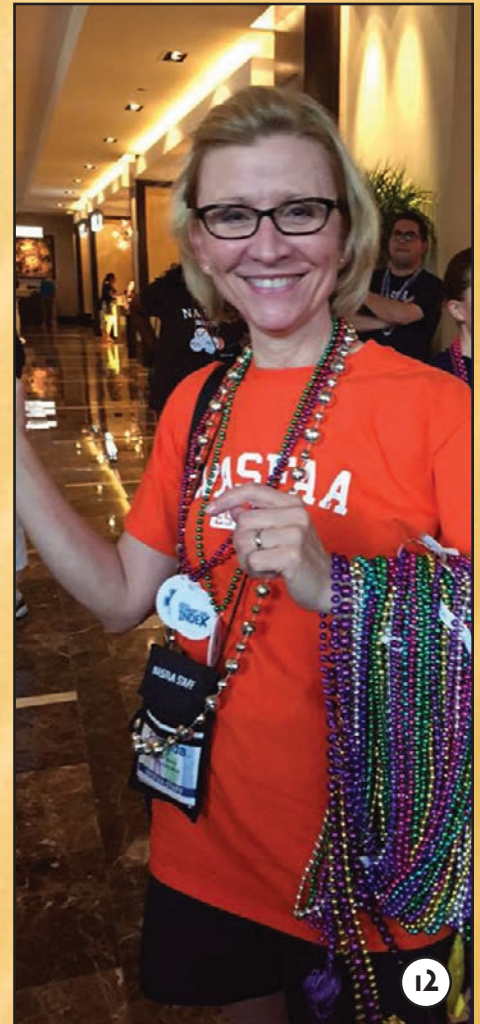
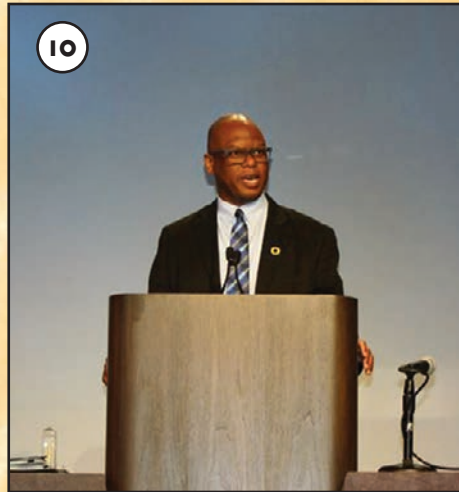
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1: Dan Mann delivers his first address as 2015-16 NASFAA Chair. 2: NASFAA members take to the streets of New Orleans! 3: "CSI: NY" star Harper Hill opens the 2015 conference. 4: Task Force members Joe Paul Case and Clantha McCurdy at the 50th Anniversary information booth. 5: 2014-15 National Chair Eileen O'Leary passes the gavel of leadership to Dan Mann. 6: All smiles at the NASFAA booth in the exhibit hall.

NATIONAL CONFERENCE IN NEW ORLEANS



7: New Orleans fun. 8: Experts debate whether student loans are a crisis for students and the economy. 9: NASFAA - Est. 1966. 10: NASFAA's first diversity officer, James Brooks, addresses the conference audience. 11: Endless luncheon networking opportunities. 12: Sharing a bit of NASFAA bling.



TRAINING AND REGULATORY ASSISTANCE



Operating at Peak Performance: NASFAA Training

NASFAA's Training and Regulatory Assistance (TRA) department provides unparalleled sources of comprehensive and targeted training and reference materials that keep members at the top of their game. In-person and online instruction and tools prepare NASFAA members not only to be successful in the administration of student financial aid, but also to grow professionally in the field.



NASFAA University opened its virtual doors in 2012 to address the expanding training needs of financial aid professionals. NASFAA U offers a nationally recognized, consistent, and rigorous program of education in administering the Title IV student financial aid programs. Those who participate in NASFAA U instruction and continue to obtain topic-specific credentials show employers and colleagues they have mastery of the components essential to the administration of Title IV aid.

NASFAA U offers five different methods to qualify to sit for an exam:

1. Complete an independent study on specific topics using a Self-Study Guide.
2. Demonstrate five or more years of well-rounded professional experience.
3. Attend a state or regional training institute that uses the approved NASFAA curriculum.
4. Participate in NASFAA U On-site Training at an institution.
5. Take one of our NASFAA instructor-led online courses.



NASFAA UNIVERSITY SELF-STUDY GUIDES

Self-Study Guides allow individuals to work through an aid topic in a self-paced manner. The Guides come complete with resources, quizzes, and reflective questions along with sample test questions designed to instill key concepts. In 2014-15, NASFAA published three Self-Study Guides and updated the ten existing Guides. 2015-16 will see three additional Guides—Cash Management, Administrative Capability, and Packaging—completing the rollout of the planned Self-Study Guides.

Self-Study Guide	2012 -13	2013 -14*	2014 -15*
Overview of Student Aid Programs	62	178	235
Student Eligibility	66	141	209
Return of Title IV Funds	78	169	265
Need Analysis	0	133	197
Direct Loan Eligibility/ Frequency (Part 1)	62	162	249
Direct Loan Repayment & Counseling Requirements (Part 2)	34	161	216
Application		125	221
Campus-Based Programs		66	207
Consumer Information			235
Cost of Attendance		90	261
TEACH Grant Program			121
Verification			90
Federal Pell Grants and IASG		18	170
Total	302	1,254	2649
No. of Unique Schools that purchased or downloaded	170	243	383
No. of Unique Individuals that purchased or downloaded	188	295	567

*Value Plus complimentary downloads included in total.

State/Regional Training Institute Partnerships with NASFAA

State and Regional use of CORE materials to provide training to their members has grown significantly over the past year. Twenty-three events were held utilizing NASFAA training materials. Additionally, more credentialed instructors are providing this training. When an instructor is credentialed, all participants under that instructor have the ability to test using a voucher system put in place specifically for the regions and states at no cost. This partnership is designed to grow the knowledge of aid administrators through training at regional and state events and provide credential testing opportunities for those who wish to pursue them.

The following state/regional groups partnered with NASFAA to offer training using NASFAA-approved CORE curriculum:

Association	Training Event	Test Vouchers Requested
Arkansas	Fall 2014	60
Massachusetts	Fall 2014	297
MASFAA Region	Summer 2015	803
Missouri	Spring 2015	274
Missouri	Summer 2015	66
Mississippi	Fall 2014	87
Mississippi	Winter 2015	108
Mississippi	Spring 2015	188
Oklahoma	Spring 2015	53
Oklahoma College Assistance	Summer 2015	23
SASFAA Region	Summer 2015	229
South Carolina	Winter 2015	18
South Carolina	Spring 2015	38
SWASFAA Region	Fall 2014	246
SWASFAA Region	Spring 2015	210
Tennessee	Spring 2015	23
Virginia	Spring 2015	33
Virginia	Summer 2015	46
WASFAA Region	Summer 2015	1,020
West Virginia	Fall 2014	111



NASFAA UNIVERSITY ONLINE COURSES

Since the inception of NASFAA U online courses, user satisfaction ratings have consistently averaged above four on a five-point scale. NASFAA continuously strives to enhance courses in response to user feedback. The addition of two dedicated instructors will increase course offerings in 2015-16, ensuring NASFAA U's continued growth.

Ratings by Topic for 2014-15

	Rating
Student Eligibility	4.66
Return of Title IV Funds	3.89
Verification	4.22
Overview of the Financial Aid Programs	4.37
Packaging & Award Notifications	4.18
Direct Loans	4.31
Cost of Attendance	4.22
Satisfactory Academic Progress	4.29
Federal Methodology	4.70
Campus-Based Programs	4.44
Federal Pell Grants	4.15
Professional Judgment	4.38

Registered Participants

Course Name	2013-14 Participants	2014-15 Participants
Campus-Based Programs	**	31
Satisfactory Academic Progress	**	59
Student Eligibility	39	27
Return of Title IV Funds	47	57
Verification	46	57
Overview of the Financial Aid* Programs	130	140
Federal Methodology	**	21
Professional Judgment	41	40
Cost of Attendance	42	35
Packaging and Notification of Awards	46	33
Federal Pell Grants	**	24
Direct Loans	45	44
Cash Management	**	38
Total	436	606
No. of Unique Schools that Registered	193	256
No. of Unique Students that Registered	370	487

*Course offered twice. ** Course not offered in 2013-14.

2015-16 NASFAA U Facilitated Online Courses

Online Course	Begin Date	End Date	Test by Date
Cost of Attendance	9/8/2015	10/5/2015	10/16/2015
Verification	10/5/2015	11/1/2015	11/15/2015
Return of Title IV	10/27/2015	11/23/2015	12/13/2015
Administrative Capability	11/2/2015	12/6/2015	12/20/2015
Overview	2/2/2016	2/22/2016	N/A
Cost of Attendance	2/22/2016	3/20/2016	4/3/2016
Direct Loan	3/15/2016	5/9/2016	5/23/2016
Professional Judgment	4/4/2016	5/1/2016	5/15/2016
Satisfactory Academic Progress	5/2/2016	5/29/2016	6/12/2016

Credentials are a tangible means of documenting professional growth in the area of Title IV aid administration. NASFAA offered fourteen credential tests for 2014-15 and received 1,490 exam orders. The Testing Center saw 648 individuals at 351 schools seek credentialing. NASFAA has awarded 1,369 credentials since the program's inception. Additional credential tests to be offered for 2015-16 will include Administrative Capability and Consumer Information. This will complete the rollout of the planned credential tests.

Number of Credentialed Examinations Ordered

Credential Name	2013-14	2014-15
Professional Judgment	31	147
Student Eligibility	109	157
Return of Title IV Funds	85	134
Federal Methodology	57	113
Cost of Attendance	81	121
Direct Loan Eligibility/Frequency	47	155
Packaging and Notification of Awards	45	141
Verification	72	204
Application	95	118
Campus-Based Programs	*	77
Cash Management	*	33
Federal Pell Grant	*	35
Satisfactory Academic Progress	*	54
TEACH	*	1
Total	622	1,490
No. of Unique Schools that Purchased Exams	184	351
No. of Unique Individuals that Purchased Exams	343	648

*Test not available in 2013-14

NASFAA U Credentials Earned Since Inception, as of June 30, 2015

Application	132
Campus Based Programs	56
Cost of Attendance	108
Direct Loan Eligibility/Frequency	120
Federal Methodology	96
Federal Pell Grant	23
Packaging and Notification of Awards	114
Professional Judgment	102
Return of Title IV Funds	145
Satisfactory Academic Progress	52
Student Eligibility	207
TEACH Grants	1
Verification	194
Cash Management	19
Total	1,369



NASFAA WEBINAR SERIES 2014-15

The NASFAA Webinar series is a popular continuing education platform presented via live-streamed web events. All 2014-15 webinars included handouts and featured presenters from institutions and/or other organizations. Staff took the opportunity in the third and fourth quarters to review how members received and used the webinars, then made several corresponding changes. For example, audiences found a conversational method of delivering information more appealing, so staff changed to this approach late in the year. Audiences also wanted to have access to the Q&A documents associated with a webinar available no later than two weeks after airing. Webinars will be live events whenever possible.

The topics for 2014-15 included policy updates as well as specific regulatory training. This programming will continue in 2015-16, corresponding with the financial aid calendar to keep topics relevant to what is happening in the financial aid office. Webinar satisfaction continued to be high, with an average satisfaction rating of 96.8 percent. NASFAA's goal is to continue this trend in 2015-16.

Upcoming Webinars

The following webinar topics have been selected for 2015-16, and additional topics may be added.

- 9/30/15 Satisfactory Academic Progress Appeals
- 10/15/15 Washington Update
- 11/18/15 Title IV Funds Late Disbursements
- 12/16/15 2016-17 Verification
- 1/12/16 Town Hall
- 3/2/16 Top "Ask Regs" Questions
- 3/23/16 Consumer Information
- 5/3/16 Town Hall
- 5/25/16 PLUS Eligibility Issues

Forty-two percent of all NASFAA's members purchased the webinar package in 2014-15.

Registration Levels and Ratings by Topic

Topic	Registered*	Rating
Tough Choices: Tackling Loan Indebtedness at Low-Cost Institutions	560	98.4
Consortium Agreements	396	96
Reporting Untaxed Income on the FAFSA	964	95.1
Verification for 2015-16	1,045	98.4
Gainful Employment	770	96.4
Consumer Information	494	97.2
Student Eligibility – Enrollment Issues	567	97.5
Are You Up to Code? NASFAA's Code of Conduct Outlines Ethical Conduct for FAAs	187	100
Cohort Default Rate Issues	397	100
Summer Aid Issues	500	88
Eligibility for Additional Direct Unsubsidized Loans	437	98

*Note: Only one registration is required per site. Nearly 44 percent of sites report three or more participants viewing webinar broadcasts together.

A close-up, low-angle shot of a mechanical watch movement, focusing on the intricate brass gears. The lighting is warm and dramatic, highlighting the metallic texture and the precision of the engineering. The gears are arranged in a complex, overlapping pattern, with some in sharp focus and others blurred in the background.

**conqueri
co**

**One word you're
sure to hear in nearly
every gathering of
NASFAA members is
"compliance."**

Applying complex, constantly changing federal requirements to an institution's unique processes is one of the greatest challenges financial aid professionals face every day. The information is out there—in regulations, laws, Dear Colleague Letters, handbooks, and more—but putting it all together and making sure it's happening on campus is a constant concern. To address this issue, NASFAA is now developing the Compliance Engine and Policies and Procedures (P&P) Builder for release in 2016. Based on two of NASFAA's most popular tools—the Self-Evaluation Guide and the Policies and Procedures Tool—this new, online tool will help members manage the administrative needs of their offices and conform to financial aid regulations and laws.

ng mpliance

The Compliance Engine will use a series of self-assessment checklists that office leaders can complete or assign to individual staff members and offices on campus, allowing them to confirm compliance with the latest requirements and identify any potential problem areas. Through the P&P Builder, a Compliance Engine module, members will be able to create, manage, assign, save, and repurpose their offices' policies and procedures manuals online. Members can save their personalized manuals from year to year, edit them as needed, and collaborate on changes. A major benefit to the new Compliance Engine is the ability for NASFAA to notify users of updates when changes are made to any section of the tool.

Compliance is never simple. But as with any difficult task, having just the right tools at hand can make all the difference. NASFAA is building the Compliance Engine to be the ideal tool to keep financial aid professionals on top of the latest requirements.



NASFAA ASKREGS KNOWLEDGEBASE

AskRegs provides a searchable Knowledgebase of answers to financial aid administrators' questions. Users can browse this extensive library of questions and responses to find an immediate answer. If the answer is not readily available, users can submit questions to the TRA staff, who will research the issue and respond.

The Knowledgebase went live in October 2012 and has continued to grow in popularity with the membership. The number of questions submitted increased by 44 percent in 2014-15 as compared to 2013-14. Staff added 354 new questions and answers in 2014-15 for a total of 2,772 now available in the Knowledgebase.

	Tickets Submitted			2014-15 Resolution Rates	
	2013-14	2014-15	% Change	24 hours or less	More than 24 hours
Jul	199	217	9%	93%	7%
Aug	203	253	25%	93%	7%
Sep	177	254	44%	92%	8%
Oct	248	284	15%	89%	11%
Nov	202	198	-2%	93%	7%
Dec	122	176	44%	91%	9%
Jan	230	278	21%	89%	11%
Feb	204	256	25%	85%	15%
Mar	248	268	8%	84%	16%
Apr	262	240	-8%	91%	9%
May	254	265	4%	85%	15%
June	234	315	35%	92%	8%
Total	2,583	3,004	16%		

Question Summary 2014-15

	Started	Submitted	Deflected*	Deflection Rate*
July 2014	204	185	19	9%
Aug 2014	250	225	25	10%
Sep 2014	277	245	32	12%
Oct 2014	306	268	38	12%
Nov 2014	213	191	22	10%
Dec 2014	183	158	25	14%
Jan 2015	310	270	40	13%
Feb 2015	225	202	23	10%
Mar 2015	266	230	34	13%
April 2015	238	199	39	16%
May 2015	319	265	54	17%
June 2015	373	315	73	20%

*Deflected questions are those that members started but did not submit, possibly due to answers suggested by the Knowledgebase or searches conducted.

Q&As Posted in the AskRegs Knowledgebase

When a topic draws a number of similar questions or NASFAA receives new guidance from the U.S. Department of Education, TRA staff develops Question & Answer (Q&A) articles to provide instantly accessible answers. In 2014-15, users performed more than 104,000 searches in the Knowledgebase on Q&As.

	No. of Searches	Q&As Published	Q&As Viewed
July 2014	5,737	36	9,892
Aug 2014	8,356	33	12,644
Sep 2014	8,132	89	15,639
Oct 2014	8,717	29	17,658
Nov 2014	6,442	22	13,859
Dec 2014	5,598	23	10,957
Jan 2015	8,757	14	14,568
Feb 2015	8,453	20	4,525
Mar 2015	8,617	17	16,135
Apr 2015	13,971	29	12,079
May 2015	10,057	20	13,338
June 2015	11,895	22	17,920
Total	104,732	354	159,214



NASFAA ANNUAL STATE & REGIONAL TRAINING MATERIALS

Each year, NASFAA’s Annual Training Task Force and NASFAA staff collaborate to develop materials that help states and regions present a half-day of instruction on a selected topic. NASFAA invites state and regional presidents to download these materials prior to the fall conference season. Topics available include the following:

2013-14: Compliance and Campus Collaboration

2014-15: Need Analysis

2015-16: Direct Loan 150% Rule



The U.S. Department of Education requires that all aid offices that award Title IV aid maintain a policies and procedures manual. NASFAA’s Policies & Procedures Tools provide an organized approach to developing and maintaining a policies and procedures manual. The update, available online in July 2015, contains student aid regulations and U.S. Department of Education guidance through July 2015. This PDF tool will also be used as the framework for the forthcoming web-based Compliance Engine (see pages 32-33).



The Self-Evaluation Guide helps schools to prepare for annual audits via a series of checklists on federal financial aid compliance requirements. NASFAA staff updated the Guide in winter 2014-15 on NASFAA.org. This PDF tool will be used as the framework for the new web-based Compliance Engine, due for release by NASFAA in 2016 (see pages 32-33).



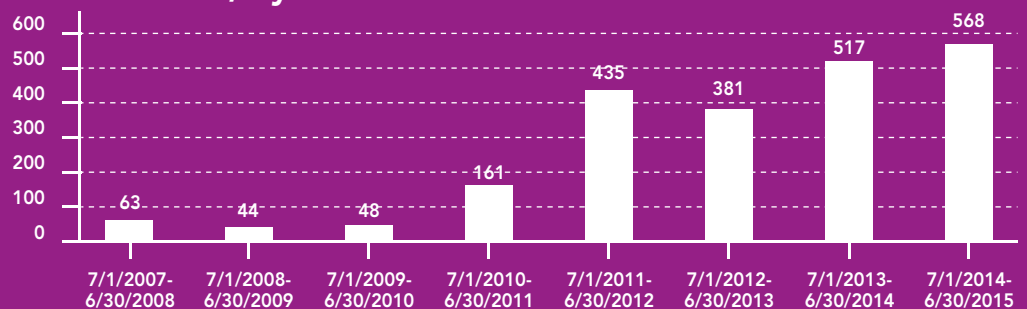
Standards of Excellence (SOE) is an objective, confidential peer review that helps schools ensure regulatory compliance, deliver financial aid funds in a cost-effective manner, maximize resources, and provide students and their families with quality customer service. This program grew over the prior year and SOE reviewers completed 13 confidential reviews across the country.

	2010 -11	2011 -12	2012 -13	2013 -14	2014 -15
Cost Estimates Requested	101	48	70	87	72
Total Reviews Completed	16	21	13	10	13



NASFAA CORE

Total Orders, by Fiscal Year



NASFAA designed CORE as a comprehensive set of instructional materials for teaching financial aid fundamentals to individuals with less than two years of experience, and for training experienced aid administrators looking for a comprehensive refresher. On April 24, 2015, NASFAA distributed electronically the updated modules and toolkit that comprise CORE. State and regional associations paid \$1,000 for an unlimited site license, with an additional charge of \$25 for a flash drive version to cover production, shipping, and handling. Pricing for institutional purchases appears on NASFAA.org. Value and Value Plus members may download CORE free as part of their membership benefits.

Training Staff

without Straining Your Budget

by Judy Cramer

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is required.
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d don't wait call HR today.

Interviews Daily!

HELP WANTED!

TEAM MANAGER

Must be able to keep
smart, talented people
engaged and happy in a
complex regulatory and
service environment
under very stimulating
conditions. Juggling
skills are essential
for managing this
diversely talented group.

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\$\$ CASH COW JOBS \$\$



People who choose financial aid for their life's work have that special something inside that makes them always ready to reach out and help someone, hungry for new challenges, and compelled to consider new approaches to old problems. Nurturing these characteristics every day is essential, because satisfying that need for knowledge will provide respite for those "heads-down" days that never seem to end at the peak times of year.

Staff development brings the kind of rewards that should make it a top priority for any organization, but it is hard to think of any other area that ends up more neglected or prone to budget cuts in our field. Financial aid is a constantly morphing landscape that demands this attention even while most of us face shrinking training dollars and expanded demand for our time. Building the capacity of your staff beyond their present threshold is the key to taking "not enough" and creating "excellence."

Take a good look around your office—there is always someone who has an interest, someone who wants to be shaped, someone who is on the verge of being a star performer and could be waiting for the opportunity. Be the one to discover and develop that talent! It is important to recognize and reward good work, but many of your staff members aren't looking for a pat on the back—they want a chance to grow. The best way to let employees know you care is to show that you recognize their interests and are willing to help them follow that passion.

NASFAA's constant stream of information can help you inspire your staff even with limited training resources, allowing you to stretch your staff members' minds without stretching your budget. One way I accomplish this in my office is by using NASFAA's recently updated book, "You're the Director: A Guide to Leadership in Financial Aid," in our regular staff training sessions. I start out by assigning Lisa Masterson's comprehensive chapter, *Financial Aid Leadership: The Basics* as a reading assignment. For group training, we worked through the chapter segment by segment. When working with individual staff members, I use it as the basis of an exploratory conversation during one-on-one meetings.

Another essay that generates meaningful discussions is Barry Simmons's chapter, *Ethical Dilemmas in Financial Aid*. This chapter provides case studies that help staff expand their thinking. It can also help the entire staff see issues in a common light and allow them to clearly understand your professional perspective. Senior staff who are interested in grooming and growth will welcome a reading assignment that matches their professional interests. This can be simply for their personal enrichment, or you can ask them to lead a discussion during a staff meeting. You can even encourage them to incorporate the theories into case studies to challenge and inspire other staff members. Beyond training, "You're the Director" is also a great book to give to someone on staff who shows interest in eventually leading a financial aid office, providing a solid basis for a personal conversation about plans for their development.

Other NASFAA products make excellent training tools as well, even those originally designed as straightforward resources. For example, as aid professionals, we all know that Today's News presents the latest student aid updates, Student Aid Perspectives and Voices from the Aid Office present the views of other aid professionals, NASFAA Monographs are valuable topical references, and Journal of Student Financial Aid articles seed our thinking and help us develop research-based ideas. However, all of these resources have also provided reading, discussion, and training opportunities for my office staff. For example, Sandy Baum's article in Perspectives, Student Loans: Crisis, Bubble, or Manageable Policy Issue, wove a number of different concepts into the narrative, giving my counseling staff a good foundation of knowledge that helped them to perform their daily work. In addition, NASFAA offers webinars that allow your entire staff to participate for a single price.

All of these resources are my partners in engaging and challenging my staff's intellect, recognizing their innate need to improve skill sets, and letting them know how they can apply those skills to achieving their professional goals. Sure, they'd rather experience a NASFAA conference, and one day I hope we will have the resources to send them. But until then, right here at home, I can make sure they have room to grow.

■ *Judy Cramer is director of financial aid for Salem State University.*

Promoting Dialogue, Ideas, and Knowledge

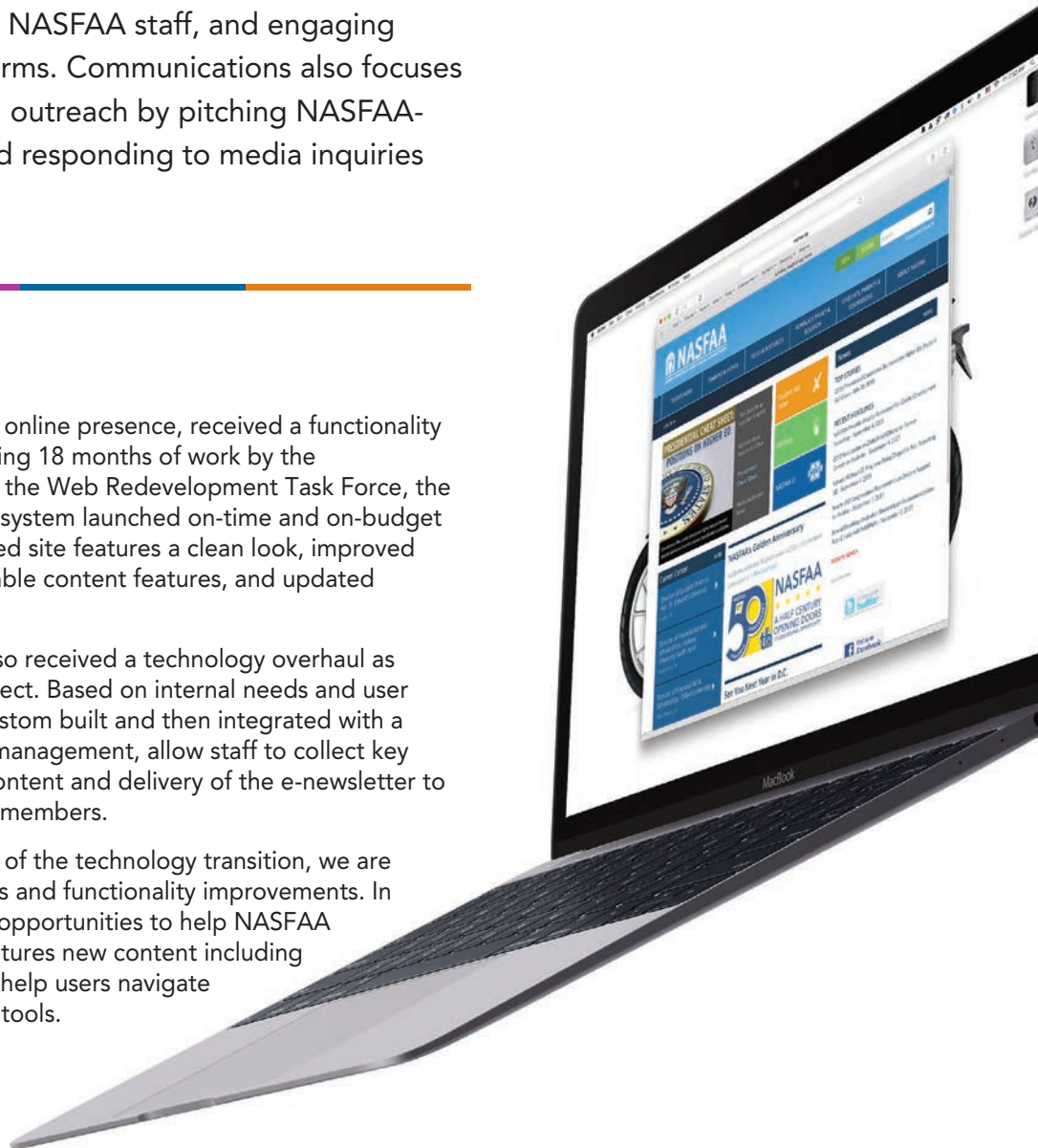
NASFAA's Communications staff maintains NASFAA.org and produces Today's News and other products and services to keep members, others in the higher education community, lawmakers, and the general public well informed about all areas of student financial aid. In support of NASFAA's mission to serve as a forum for the financial aid community, Communications stimulates dialogue by publishing straw polls and quick surveys, encouraging comments on articles written by NASFAA staff, and engaging members on social media platforms. Communications also focuses on proactive and reactive media outreach by pitching NASFAA-originated news to reporters and responding to media inquiries related to student aid issues.

The NASFAA Website

NASFAA.org, the Association's primary online presence, received a functionality and design overhaul in 2014-15. Following 18 months of work by the Communications staff, with the input of the Web Redevelopment Task Force, the new website and content management system launched on-time and on-budget on June 29, 2015. The new and improved site features a clean look, improved search functionality, targeted customizable content features, and updated navigation.

The Today's News daily e-newsletter also received a technology overhaul as part of the website redevelopment project. Based on internal needs and user feedback, the management tool was custom built and then integrated with a new email platform to streamline data management, allow staff to collect key readership data, and better tailor the content and delivery of the e-newsletter to the needs and preferences of NASFAA members.

While NASFAA has completed the bulk of the technology transition, we are planning additional site content updates and functionality improvements. In the meantime, the site offers feedback opportunities to help NASFAA evaluate further enhancements, and features new content including guidance and short videos designed to help users navigate the site and take advantage of the new tools.



NASFAA Website Indicators

While the platforms may be different, NASFAA continues to monitor key site traffic metrics.

Measure	2012-13	2013-14	2014-15
Visits	1,115,791	1,075,745	1,114,453
Average Visit Duration (in minutes)	3:20	3:11	2:59
Page Views	2,985,768	2,892,782	2,974,592
Pages Per Session	2.68	2.69	2.67
Site Users	424,894	463,384	457,181

Top Content Pages Visited, July 1, 2014, to June 30, 2015

- Today's News
- AskRegs - NASFAA pass-through to the AskRegs Knowledgebase
- Manage Your Membership
- The 2015 NASFAA National Conference
- State & Regional College Tuition Discounts

Traffic in 2014-15 was reasonably on par with previous years. The site experienced modest increases in visits, users, and page views over the prior year, as well as slight decreases in the time spent on the site and individual pages viewed per visit. The development and release of new customization tools and other user-friendly features will likely result in more significant growth in the use of NASFAA.org in 2015-16.



Members frequently cite Today's News, NASFAA's daily e-newsletter, as the number one reason they belong to NASFAA. Every weekday, Today's News serves more than 21,000 subscribers with original news, financial aid content from major news outlets, key announcements from the Department of Education, and guidance on taking advantage of all NASFAA services.

Top Today's News Content

As part of our strategic priority to serve as the primary source of information on student financial aid issues, NASFAA presents members with a significant amount of original news content that they cannot find elsewhere. In 2014-15, 53 percent of the top 15 news articles each month qualified as "original news" researched and written by NASFAA reporters, policy staff, and others—a 3 percent increase in readership of original news content from the previous fiscal year.

Month	Percentage of Top Content that Is Original NASFAA News
July 2014	40
August 2014	33
September 2014	47
October 2014	33
November 2014	53
December 2014	53
January 2015	67
February 2015	60
March 2015	46
April 2015	60
May 2015	67
June 2015	80

Most-Read Original Content, July 1, 2014, to June 30, 2015

1. Student Aid Perspectives: Deferred Action for 'Dreamers': Advising DACA Students About Affording College, by Angela D. Adams
2. Student Aid Perspectives: Myths and Realities about Rising College Tuition, by David H. Feldman
3. Student Aid Perspectives: FAFSA's Unaccompanied Homeless Youth Questions - Opening Doors or Creating Confusion? by Patricia Hurley and Mark Delorey
4. Seriously, What Is Up with Perkins for 2015-16? by NASFAA Policy & Federal Relations Staff
5. Spending Bill Funds Max Pell, Provides Modest Increase to Some Programs, by NASFAA Policy & Federal Relations Staff

NASFAA Original Article Series

As part of our original content offerings, NASFAA regularly publishes seven article series, a video series, and a survey series: Student Aid Perspectives, Exploring Ethics, Ask Mr. Ethics, Voices from the Aid Office, Opening Doors, MVP: Most Valuable Professional, The Policy Brief, Partners in Policy, and Poll the Pros.



STUDENT AID PERSPECTIVES

Perspectives presents the viewpoints of experts on current issues in student aid and encourages thoughtful dialogue among NASFAA members. NASFAA published five Perspectives articles from July 1, 2014, to June 30, 2015:

- Setting The Record Straight On Year-Round Pell Grants: A Policy Perspective by Jason Delisle and Ben Miller
- Cohort Default Rates: The Real Story at Community Colleges by Michael J. Bennett
- Putting Institutional Performance in Perspective by Marcus Szymanoski
- Filing the FAFSA Matters, but So Does Filing On Time by Heather Novak and Lyle McKinney
- Award Displacement Reduces the Benefits of Private Scholarships by Amy Weinstein



EXPLORING ETHICS

The Exploring Ethics series, which debuted in October 2014, uses case studies to open discussion among NASFAA members about how to apply the Association's Ethical Principles and Code of Conduct. NASFAA published three Exploring Ethics case studies from the start of the series to June 30, 2015:

- Exploring Ethics in Award Letters
- Exploring Ethics in Debt Conversations
- Exploring Ethics in FAFSA Data Sharing



NASFAA's Ask Mr. Ethics series, which debuted in March 2015, provides a forum for members to ask an anonymous question and receive practical advice about how best to deal with ethical dilemmas on campus while adhering to NASFAA's Statement of Ethical Principles and Code of Conduct. NASFAA published six Ask Mr. Ethics articles from inception to June 30, 2015:

- Can I Share a Student's Personal Data with Other Employees at Our Institution?
- Can I Offer My Personal Experience with Certain Lenders to Borrowers?
- Can We Ride Our Vendor's Party Bus?
- Is Our Award Letter Wording Confusing?
- Is It OK to Let One of Our Vendors Treat Me to Lunch?
- Can I Award Aid to a Family Member?



VOICES FROM THE AID OFFICE

This occasional series features the thoughts and opinions of NASFAA members working on campus. Six Voices articles were published from July 1, 2014, to June 30, 2015:

- How to Celebrate Success
- State Budgets: The Good, the Bad, and the (Mostly) Ugly
- Four End-of-Semester Obstacles to Help Students Overcome
- Four Ways to Help Students Improve Their Personal Budgets
- Combating Misinformation among Students and Parents
- Four Lessons Learned from Applying for Financial Aid



OPENING DOORS

The Opening Doors series profiles students who are succeeding in college with the help of financial aid and the financial aid professionals who work with them. Opening Doors profiled three students between the series' inception in February 2014 and June 30, 2015:

- Andrea Velazquez, Illinois Institute of Technology
- Eliana Lozano Perez, University of South Florida
- Taiwo Adefiyiju, Providence College, RI



MVP: Most Valuable Professional features brief question-and-answer interviews with NASFAA members across the country. This year’s MVPs included:

- Lori Vedder, director of financial aid at the University of Michigan-Flint
- Myrna Perkins, associate dean of student services, director of financial aid at Barton County Community College (Great Bend, Kansas)
- David Sheridan, director of financial aid at Columbia University School of International and Public Affairs (New York City, NY)
- Neville Brown, assistant director of financial aid at Eastern Connecticut State University (Willimantic, CT)
- Sara Beth Holman, director of financial aid at Lawrence University (Appleton, WI)

The Policy Brief

The Policy Brief, an occasional video series that debuted in August 2014, gives members a quick glimpse into the activities of NASFAA’s policy and federal relations team. The series produced four videos between its inception and June 30, 2015:

- NASFAA’s Take on FAFSA Simplification
- The 2016 Budget Process: What Can We Expect?
- The 114th Congress and Reauthorization
- Reauthorization of the Higher Education Act



NASFAA’s Partners in Policy, another new series that debuted in 2014-15, profiles colleagues at the associations, foundations, and think tanks that NASFAA works with to advance higher education and financial aid policies. Between its inception in January 2015 and July 1, 2015, the series published two articles featuring the following organizations:

- The Bill & Melinda Gates Foundation
- The National Association for College Admission Counseling

The series published a third article featuring the National College Access Network (NCAN) on July 20, 2015, just before the 2015 NASFAA National Conference.

Poll the Pros

This quick survey series helps members quickly discern how their work in the financial aid office compares to that of their colleagues across the country. Members can answer the latest poll question and instantly see how their colleagues answered that same question. NASFAA published nine of these polls in 2014-15:

- Agree or disagree: Student loans are a crisis for students and the economy.
- How does your school use academic plans for SAP appeals?
- What best describes your use of the optional borrower-based academic year (BBAY) for the summer term?
- Which NASFAA Servicing Issues Task Force recommendation is most needed?
- What issue would you most like to see addressed in 2015?
- What is the most common professional judgment (PJ) adjustment request your office receives?
- Did your three-year cohort default rate go up, go down, or stay the same?
- What presents the biggest challenge for your office as students return to school?
- How does your office assign counseling responsibilities?

Media

NASFAA in the News

NASFAA received a large number of significant mentions in the local, national, and trade press.

Total NASFAA Media Mentions July 1, 2014, to June 30, 2015	Original Mentions (as opposed to Reprints)	Reprints (articles that are republished or syndicated)
802	211	591

NASFAA tends to see large spikes in media mentions when specific news events coincide with our key issues. For example, at NASFAA’s July 2014 National Conference, Jeff Baker, U.S. Department of Education Office of Federal Student Aid policy liaison, announced that at least 165,000 college students applying for financial aid might have been denied loans and grants because they had unnecessarily entered a decimal point and cents into certain fields on the FAFSA and the system had ignored the decimal point. Several resulting news stories mentioned NASFAA, including an Associated Press (AP) story reprinted by 243 news outlets nationwide.

Media Mentions, by Month

Month	Reprints	Total Mentions
July 2014	252	277
August 2014	9	24
September 2014	60	70
October 2014	4	9
November 2014	20	36
December 2014	20	36
January 2015	13	25
February 2015	19	38
March 2015	32	51
April 2015	23	43
May 2015	119	161
June 2015	20	32

Quality Coverage

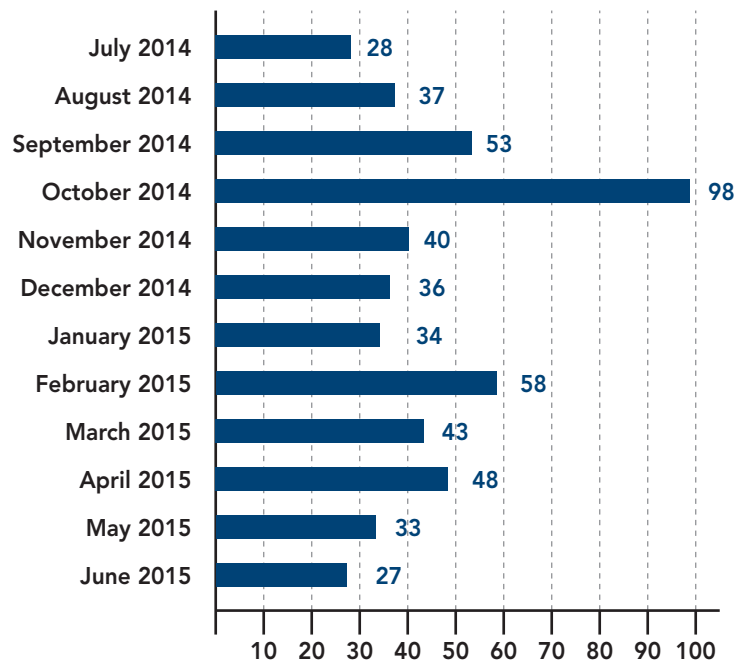
NASFAA also aims to cultivate relationships with key reporters and ensure coverage in important publications read widely by both the higher education community and consumers. A few examples of outlets that cited NASFAA during the period include:

- Associated Press
- The Boston Globe
- The Chicago Tribune
- The Chronicle of Higher Education
- CNBC
- CNN Money
- C-SPAN2
- Education Week
- Forbes
- FOX Business
- Inside Higher Ed
- MarketWatch
- National Journal
- The New York Times
- NPR
- PBS Newshour
- Politico
- Reuters
- TIME
- University Business
- U.S. News & World Report
- USA Today
- The Wall Street Journal
- The Washington Post
- Yahoo! Finance

Social Media

NASFAA's social media audience continued to grow in number. The Communications staff recorded monthly progress during 2014-15 in four key platforms of social media engagement: Facebook, Twitter, LinkedIn, and members' comments posted on NASFAA.org content pages. NASFAA content pages received an average of 45 comments per month, including October, when the number of comments spiked to nearly 100. Sixty of those comments resulted from a Your Thoughts question in Today's News, which asked "If you could change one thing about the Federal Methodology, what would it be?"

Comments on NASFAA Content, by Month



Facebook/Twitter Usage by Month

NASFAA members are active on many social media sites, but by the end of 2014-15, Twitter (6,303 followers) had surpassed LinkedIn (6,176 participants) as the most-followed platform. Activity on all three platforms steadily increased throughout the period, with NASFAA's Twitter account gaining approximately 100 new followers each month.

	Facebook Followers	Twitter Followers	LinkedIn Followers
July 2014	3,102	5,145	5,535
August 2014	3,118	5,244	5,581
September 2014	3,141	5,383	5,626
October 2014	3,187	5,506	5,679
November 2014	3,216	5,593	5,725
December 2014	3,244	5,704	5,758
January 2015	3,283	5,808	5,804
February 2015	3,326	5,927	5,851
March 2015	3,282	6,024	5,933
April 2015	3,320	6,116	6,010
May 2015	3,361	6,217	6,092
June 2015	3,400	6,303	6,176



COMING HOME TO YOUR OWN PERSONALIZED NASFAA WEBSITE

NO TWO FINANCIAL AID ADMINISTRATORS HAVE THE SAME NEEDS AND INTERESTS, BUT THEIR EXPERIENCES ON MOST WEBSITES—EVEN THE NASFAA WEBSITE—HAVE LONG BEEN ONE-SIZE-FITS-ALL.

At the end of June 2015, however, NASFAA launched its improved website with several new features that make the site customizable. It's like taking a 1950s "cookie-cutter" house and transforming it into a Victorian or Craftsman home. With improved search features, more user-friendly site navigation, and a personalized dashboard, the website can be tailored to each member's personal work style.

See something you like? Favorites, the NASFAA-specific bookmarking system, allows users to choose pages throughout the NASFAA site to create a list of easy-access items on a single page. Users can also select from key topics in the Suggested Content tool to compile site content according to their selections—making it into a site that almost reads minds. Website users will receive on-screen notifications and can opt-in to receive email notifications when items are added or updated.

These same topic areas drive the Related Content feature, where additional items that may be of interest display in the right column for many news articles, reports, and other content. Another new feature, the dashboard—which appears on every page but can be hidden with a click of the mouse—serves as a personalized navigation system for users, containing Favorites, the user's myNASFAA Profile information, and Suggested Content.

NASFAA's daily newsletter, Today's News, and the Student Aid Index are also better integrated into the redesigned website. The Student Aid Index is fully incorporated into the updated website, and Today's News is more prominently featured on NASFAA.org. It now comes with a navigation feature that allows users to view previous issues up to three months in the past. Users can also conduct a search from the Today's News area that shows results for full issues or only articles that ran in the newsletter, rather than showing search results from all site content. This is a brand new feature that users really appreciate. A member said, "What a big difference the new search makes. It takes me straight to what I need. You wouldn't believe how much time it is saving me."

Overall, a key goal of the redesigned site is increasing quick, easy access to exactly the information you need at the moment you need it. The new, personalized experience makes NASFAA's website more like its users: unique, powerful, and ready to respond to any challenge.

IT'S NOT JUST ABOUT THE TEST

**With all my years of experience,
I was worried I wouldn't pass.**

Then I thought to myself, I help students every day. I know what I'm doing.

Earning credentials is about strengthening what I already know so I can continue to help students as the financial aid regulations change and evolve.

Earning credentials tells my boss, my staff, my students, and the world, I have what it takes to be successful and I know what I'm doing in the financial aid office.

**NASFAA University Credentials.
Earn yours today.**

Choose from 16 Credentials!

Part 1

Application Process
Student Eligibility
Cost of Attendance
Federal Methodology
Verification

Part 2

Federal Pell Grants
Campus-Based Programs
TEACH
Direct Loans
Packaging

Part 3

Return of Title IV Funds
Professional Judgment
Satisfactory Academic Progress
Cash Management
Consumer Information
Administrative Capability

For new financial aid professionals, NASFAA recommends moving through the credentials in the order shown; however, this sequence is not a requirement.



NASFAA
UNIVERSITY
CREDENTIALLED TRAINING





ADVOCACY



Advocating for You

NASFAA's advocacy initiatives ensure that the complex needs of students, institutions, and the financial aid community are at the forefront of student aid policymaking and lawmaking. As the reauthorization of the Higher Education Act of 1965, as amended (HEA) approaches, NASFAA's advocacy and educational efforts are more important than ever. These efforts center on increasing access to student aid; minimizing student indebtedness, and promoting need-based aid. NASFAA emphasizes dialogue and interchange on critical issues to develop advocacy positions that reflect the knowledge and experience of our members in the field.

NASFAA Forums

Policy forums—a central part of NASFAA's mission—allow NASFAA to leverage the expertise of our members to remain a leading voice in the national policy conversation about the effectiveness and sustainability of crucial federal aid programs. These forums encourage key stakeholders in the higher education policy community—congressional staff, association colleagues, and researchers—to meet to discuss and debate key issues in federal student aid policy.

In 2014-15, NASFAA sponsored three financial aid policy forums:

- **Legislative Symposium (March 2015):** NASFAA's fourth annual Legislative Symposium brought together leaders of state and regional financial aid associations nationwide and key stakeholders in the Washington, D.C.-area policy community. The Symposium was part of NASFAA's larger Leadership & Legislative Conference held March

1-3, 2015. Participants heard from Obama administration officials, polling experts from Gallup, and others. Full details about the conference appear on page 18.

- **Implications of Implementing Prior-Prior Year Income (May 2015):** One of NASFAA's core reauthorization recommendations has been to switch to the use of prior-prior year (PPY) income on the FAFSA. With generous support from the Bill and Melinda Gates Foundation, NASFAA produced the report, *Great Expectations: Implications of Implementing Prior-Prior Year Income Data for the FAFSA*. In May, NASFAA presented an event on Capitol Hill featuring an esteemed panel of representatives from the admissions, early access, and state grant aid communities. The panel discussed the report's findings that the benefits of PPY outweigh any of its potential negative consequences. On September 13, 2015, President Obama took action to put PPY into effect beginning with the 2017-18 FAFSA.

- **Student Aid Orientation for Congressional Staff (July 2015):** NASFAA's fifth annual student aid orientation on Capitol Hill for congressional staff, based on NASFAA's 2015 National Student Aid Profile: Overview of 2015 Federal Programs, presented a basic overview of the history and purpose of each of the student aid programs. A broad cross-section of staff from House and Senate offices and representatives from the Washington, D.C. higher education policy community attended the event.

Proactive Public Policy Efforts

NASFAA continued engaging in proactive public policy efforts this year through the release of four policy-related task force reports and associated recommendations. The task force model allows NASFAA to identify and get in front of student aid policy issues that are percolating on Capitol Hill, engage members, and develop policy recommendations to have on hand when needed.

Servicing Issues Task Force (August 2014-Jan 2015): The Higher Education Loan Coalition (formerly Direct Loan Coalition) and NASFAA delivered a report to the U.S. Department of Education and other relevant agencies containing recommendations for improving federal student loan servicing. The report clearly indicated (1) areas of deficiency in loan servicing, (2) the extent (i.e., how widespread) of those deficiencies, and (3) proposed solutions. The task force comprised a geographically diverse group of NASFAA and Coalition members from all types of postsecondary institutions, including members representing graduate and professional institutions. The Coalition Executive Board and NASFAA Board of Directors voted to approve the recommendations in January 2015.

Thanks to Dallas Martin Endowment (DME) supporters, Angel Flores had the opportunity to gain real-world policy experience on Capitol Hill as a NASFAA Policy Intern. Angel wrote the following note to give NASFAA members and future Dallas Martin Endowment interns a glimpse into his experience this summer.

My Top Ten Takeaways as NASFAA's 2015 DME Intern

Getting to be the Dallas Martin Endowment intern for NASFAA this summer was truly an honor and a blessing. All of the wonderful opportunities and experiences I had both furthered my professional development and expanded my scope of knowledge far beyond what I would have ever imagined. I am incredibly lucky and grateful to have had such a fantastic team of mentors to work alongside each day. I look forward to applying my newfound knowledge and experience that I gained at NASFAA with the people I work with in my aid office back home, as well as in my future career experiences. I thank NASFAA as well as the donors of the DME fund immensely for investing in future financial aid administrators and advocates like myself.



I have compiled the 10 most impactful takeaways that I will always carry with me now that my time as an intern with NASFAA is up.

- 1) When unsure, it's crucial to ask questions to avoid getting left behind. Because the world of higher education moves so quickly, you must have a general knowledge of what important items are occurring, at the very least, at the federal level. And if you really want to stay attuned in the financial aid/higher education realm, stay involved in what's going on at your state and institutional level.
- 2) Getting to know your co-workers and what they do for NASFAA is an awesome benefit of interning! While I worked more closely with those on the Policy Team, I tried my hardest to get to know every other NASFAA staff member. This allowed me to get better insight on what role that particular person plays at NASFAA, then I would work to understand how their job function plays into NASFAA's overall mission.
- 3) Take advantage of all of the resources around you! Working for NASFAA, there are a plethora of reading materials just lying around the office waiting to be picked up and read. Before my first day at the NASFAA office had even ended, I had identified at least three NASFAA publications that I was interested in taking home and reading in my spare time. Once those in the office learned that I had an ongoing desire to learn as much as I could about financial aid, they graciously offered me their extra reading and training materials.
- 4) Stay on top of any important news that relates to higher education and financial aid. This is a must. As the topic of Reauthorization of the Higher Education Act is currently at the forefront of current higher education policy, it is imperative that you know what important pieces of legislation, hearings, and events are occurring to stay up-to-date.
- 5) Unused knowledge is wasted knowledge, in my opinion (i.e., if you know something, speak up!). I can't begin to count the amount of new information that I learned this summer due to it either being mentioned by someone in passing, someone mentioning it in the office, or it being mentioned at one of the many meetings that I attended. Because there are so many sectors within higher education, it's nearly impossible to stay current on all of the important, pressing issues. This is where sharing what crucial and important information you do know can be incredibly beneficial and helpful to the person on the receiving end.
- 6) Always ask for recommendations. Having absolutely no idea what to do/see/experience in D.C., (aside from the usual tourist attractions), I took this opportunity to gather suggestions from my co-workers. This is how I got the idea to travel to New York City for the weekend!
- 7) NASFAA volunteers are a powerful force. Getting to work directly with members from CASFAA and WASFAA showed me just how passionate and selfless our members truly are. Each week I got to work with a fresh new group of financial aid volunteers, and each time I witnessed how committed they are to serving students across the country. This is just one of many examples where members selflessly donate their time to a larger cause in the financial aid community.
- 8) Take every opportunity to interact with the NASFAA members. Whether this is through direct communication at events like the NASFAA conference, or by replying to comments that they post on blogs and news articles, any form of direct interaction shows that NASFAA is committed to serving and engaging with its members.
- 9) NASFAA takes care of its members. This was abundantly clear at the conference. I was able to witness, firsthand, just how invested the NASFAA staff is in the success, growth and professional development of each of its members. This is evident in not only the services and products that NASFAA works hard to develop and offer, but also the mentorship and guidance that NASFAA provides.
- 10) When not working, go out and enjoy D.C. and the surrounding areas! Whether touring the National Mall, going for a run in suburban D.C., or purposely going to the grocery store in another state just to sightsee, I made it my priority to travel as much as possible during my time here in D.C.

Innovative Learning Models

(November 2014-June 2015): In response to rising costs and the large growth in the number of nontraditional students, policymakers and educators have started examining innovative learning models as a possible solution for higher education. Competency-based education, prior learning assessments, and massive open online coursework (MOOCs) are among the types of initiatives garnering attention, with the goal of expanding access, speeding time to degree completion, and reducing reliance on student loan borrowing.

Because much of the federal financial aid system was designed years before the development of many of these learning models, attempts to cultivate and implement innovative learning models within the confines of the existing federal student aid system have led to regulatory challenges, not to mention concerns over opportunities for fraud and abuse. The pending HEA reauthorization provides an opportunity to address these issues and take proactive steps to thoughtfully implement meaningful reforms.

To help address these challenges, NASFAA convened a task force in November 2014 charged to achieve the following:

- Meet with experts and pioneers in innovative learning models to better understand current and future trends;
- Consider the implications and challenges of administering Title IV aid for students in these new types of programs under existing statutes and regulations;
- Formulate recommendations for how Title IV legislation and regulations might be changed to accommodate these types of programs while protecting the federal investment and providing for program integrity; and
- Identify potential future development or demonstration projects that would experiment with innovative learning models.

Return of Title IV Funds Task Force

(November 2014-June 2015): With HEA reauthorization on the horizon, NASFAA convened a task force to discuss ways to improve the Return of Title IV (R2T4) funds process. The task force, composed of seasoned financial aid professionals, ultimately released a report with three different potential frameworks for improving R2T4.

FAFSA Working Group (February 2015-June 2015)

(February 2015-June 2015): In response to the growing number of simplification proposals within the context of reauthorization, NASFAA convened a FAFSA Working Group (FWG) to discuss FAFSA simplification. The group focused on how the application process could be more efficient for students and families by making better use of existing technologies.

NASFAA's FWG suggests a tiered application that offers applicants a customized set of questions, rather than sticking with a "one-size-fits-all" approach. The tiered application would identify applicants who—according to their existing means-tested benefits and tax filing status—are presumed to have low financial resources. Such students would be presented with only a minimal number of FAFSA questions as opposed to dealing with questions that may not apply to their circumstances. Families with more complex financial circumstances would have a more complicated federal application, but utilizing better timing and technology in the FAFSA process would allow those families to import the large majority of their application information directly from their tax returns.

The group also made the following recommendations:

- Use prior-prior year income data to determine student aid eligibility;
- Expand the IRS Data Retrieval Tool (DRT) to include all relevant line items of the 1040 and W2;
- Institute a three-level application process where applicants would be steered down one of three application paths based on their responses to demographic and

dependency status questions; and

- Revise the result of the Federal Methodology to an index that ranks applicants according to their financial strength rather than an expected financial contribution.

Key Meetings on Public Policy Issues

NASFAA staff met with staff from the following federal groups and organizations in 2014-15:

- U.S. Department of Education
- U.S. Government Accountability Office
- U.S. Office of Management and Budget
- House Committee on Education and the Workforce
- Senate Health, Education, Labor and Pensions Committee
- Senate Banking Committee
- Senate and House Labor, Health, Human Services and Education Appropriations Subcommittees
- White House Domestic Policy Council
- U.S. Commission on Civil Rights

NASFAA Advocacy Pipeline

NASFAA developed the Advocacy Pipeline in 2012-13 to bring more NASFAA members to Capitol Hill to advocate on behalf of their students, institutions, and the federal student aid programs. In 2014-15, its second full year, the Pipeline brought close to 20 NASFAA members to Washington, D.C., enabling NASFAA to raise lawmakers' awareness of financial aid administrators' concerns and put a human face on broader policy issues with which NASFAA is involved. Since its inception in 2012-13, nearly fifty NASFAA members have met with dozens of congressional staff members in both the House and Senate.

YOUR ROLE





IN REAUTHORIZATION

By Lori Vedder

When lawmakers reauthorize the Higher Education Act of 1965 (HEA), which expired on September 30, 2015, we can expect to see a variety of important changes to the student aid programs.

Past reauthorizations have added or eliminated programs, streamlined existing programs, altered processes and requirements, adjusted authorized funding levels, and more. Right now, it is especially important to stay abreast of what lawmakers are thinking, saying, and doing surrounding reauthorization. Although legislative changes do occur during the approximately five years between HEA reauthorizations, reauthorization legislation usually accounts for the changes that have the greatest impact on our students and our work.

As financial aid professionals, I strongly feel we have an obligation to participate in the reauthorization of the HEA. It is of utmost importance that we make our voices heard and help guide policy throughout this process. Over the next several months, we will be hearing and reading several proposals and draft legislation, both

partisan and bi-partisan. We will be witnessing politics at its “best.” The financial aid profession will be instrumental during this round of reauthorization, effectively shaping change on behalf of students, our campuses, and the higher education community at large. This is not a time for us to sit idle and just watch things unfold.

Topics likely to be prominent throughout this reauthorization include flexible Federal Pell Grants, increased transparency, and greater accountability of schools when it comes to loan borrowing, repayment, and graduation rates. FAFSA simplification, accreditation and other hot topics will also likely arise.

How can you stay on top of things and have your voice heard? You might start by familiarizing yourself with NASFAA’s current recommendations on reauthorization, found in the Advocacy, Policy, and Research tab on the NASFAA website. This tab also includes concise summaries of key concerns in Advocacy Issue One Pagers. Then, as the reauthorization process continues to unfold, watch NASFAA’s Today’s News for regular updates on the status of legislative actions and guidance on how you can provide your feedback directly through your congressional leaders in Washington, D.C. and in their home offices. You can also communicate directly with the NASFAA staff about your concerns and interests.

Even after reauthorization, communicating your views to NASFAA and Department of Education will remain vital during the Negotiated Rulemaking and Notices of Proposed Rule Making (NPRM). These are the means by which the U.S. Department of Education negotiates the terms of a proposed rule among themselves and stakeholders, such as the financial aid community and other interest groups, to ultimately regulate the new legislation.

As this round of reauthorization reaches the table, we must be prepared to speak up and share our experiences and knowledge. Working with the federal student aid programs as we know them today, as well as with the students who benefit from these programs, we know what seems to be working and what doesn’t seem to work. We know what administrative burden is and can recognize when more may be headed our way. If too many of us fail to share our thoughts and ideas (of which none are too big or small), then we have failed to support our profession, students, and communities that will benefit from those whom we help to educate.

■ *Lori Vedder is director of financial aid at University of Michigan – Flint*



RESEARCH

Discovery and Insight

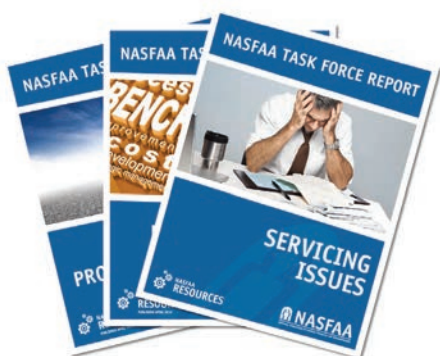
NASFAA's research initiatives explore and examine issues in student aid, supporting the organization's advocacy, training, and outreach efforts with data from our membership. Our independent and collaborative studies encourage data-supported critical analysis of student aid policy and methods of encouraging equity in access, choice, and success in higher education.

This year, NASFAA's research efforts included a broad range of member surveys, major research reports, productive collaborations with other higher education stakeholders, and strategic steps to increase the exposure and prestige of the Journal of Student Financial Aid.

Surveys

NASFAA administered several surveys to all or targeted segments of the membership in 2014-15:

- 2014 National Conference Evaluation, Nashville (July 2014)
- Annual Institutional Loan Survey (August 2014, in partnership with the College Board)
- 2015 Administrative Burden Update Survey
- NASFAA-Association for the Study of Higher Education Collaboration Research-to-Practice Survey



- Surveys for NASFAA Task Force/ Working Group Reports:
 - Management Benchmarking Task Force Survey
 - Servicing Issues Task Force Survey
 - Cost of Attendance Budget Construction Survey
- Quick Scan Surveys:
 - Community college participation in the federal loan programs
 - Suggestions to rename or rebrand Expected Family Contribution
 - Top five most common mistakes new financial aid directors make
 - Ranking the ten biggest milestones in financial aid
 - How financial aid offices are grappling with resource shortages through creative solutions (a follow-up survey to the 2015 Administrative Burden Update Survey)
 - Cost of attendance inquiries about NCAA policy changes
 - "Aid Like a Paycheck" participation

Major Research Reports

NASFAA released three major research reports between July 2014 and June 2015:

- **2014 National Profile (July 2014):** The 2014 NASFAA Student Aid Profile provides the latest information and data about each of the programs authorized under Title IV of the Higher Education Act of 1965, as amended (HEA). The Profile also presents recent trends in federal program appropriations, lists income levels of students and families who receive aid, and includes a description of the federal student aid application.
- **2015 Administrative Burden Survey Update (April 2015):** Designed as a follow-up to NASFAA's 2010 survey, this survey assesses the existing capabilities of members' financial aid offices, identifies resource shortages that may hamper the delivery of financial aid services, and examines the causes of those shortages and the potential impact they may have on both students and office processes. The findings indicate that students attending institutions from all higher education sectors are likely experiencing reduced access to financial aid office services, largely due to a prolonged increase in administrative burden and limited operating resources. This survey reveals the widespread perception that the resource shortages felt by aid administrators are not short-term products of our economy, but rather are permanent structural problems without foreseeable reprieve.

To help reverse the trend and free up more time for counseling, NASFAA offered nine recommendations. Starting in fall 2015, NASFAA website users will be able to access this data through an interactive panel using predetermined filters such as NASFAA region, institutional sector, full time equivalent (FTE) employees, and more.



- Great Expectations: Implications of Implementing Prior-Prior Year Income Data for the FAFSA (May 2015):** This paper addresses expressed concerns, considerations, and benefits related to implementation of PPY, arguing that the numerous potential advantages of PPY far outweigh concerns about potential disadvantages. The paper is one part of a greater consortium with the National College Access Network (NCAN) and the Education Trust, convened to simplify the financial aid process and increase access and success in postsecondary education. NASFAA presented the recommendations and implications at an event in May 2015 in Washington, D.C. President Obama, on September 13, 2015, took action to put PPY into effect beginning with the 2017-18 FAFSA.

Collaborations

NASFAA participated in collaborations with multiple groups and associations during 2014-15 to further the study of federal student aid in various areas:

- Association for the Study of Higher Education (ASHE):** NASFAA and ASHE have been engaged in a collaborative effort that pays particular attention to how financial aid serves as a crucial instrument to combat inequality through promoting student access and success. As part of this collaboration, NASFAA plans to deliver a white paper to the ASHE membership at their 2015 Annual Conference and to the NASFAA membership during fall 2015. The white paper will include the following:
 - o A review of literature on current knowledge surrounding student aid research and practice;
 - o Recommendations for more research related to practice in student aid; and
 - o New information about practitioners' use of research collected from NASFAA membership via surveys and focus groups conducted at statewide conferences and the NASFAA National Conference.

- Texas Guaranteed (TG):** NASFAA has collaborated with TG since early 2014 on a multi-phase research project to examine how students respond to current counseling systems and to provide recommendations to higher education practitioners and policymakers on how to better respond to the growing complexity of the federal student loan program. Reports 1-3, released in early 2015, focused on online student entrance counseling, online student exit counseling, and a legislative history and literature review of loan counseling. The remaining two reports on best practices and a summary of the overall project findings will be released in late 2015.
- Beyond 12:** NASFAA partnered with CASFAA, WASFAA, Beyond 12, and several other associations to offer assistance and an online ticketing system for students displaced by the closure of Corinthian Colleges in April 2015 in areas such as financial aid, transfer services, and academic advising.
- CAS Professional Standards for Higher Education:** NASFAA served on the CAS board and participated in the updating of their Financial Aid Program Standards and providing feedback on other standards for various postsecondary program areas.
- Access Group:** NASFAA collaborated with Access Group to survey our graduate and professional members regarding how graduate and professional schools are offering students meaningful information on financial education topics. NASFAA presented the results of this survey at Access Group's annual conference in November 2014. This survey will be conducted annually starting in 2015-16.

Grant Funding

Access Group awarded NASFAA grant support for 2015-16. The supported project will determine what consumer information is most vital in aiding graduate and professional students, and particularly law students, in making informed borrowing decisions and encourages enrollment in and completion of law and other graduate and professional programs.

Management Benchmarking Task Force

(October 2014-February 2015):

NASFAA convened its Management Benchmarking Task Force to identify benchmarks that financial aid directors would find helpful in their management roles, determine what methods should be used to compile these benchmarks, provide a framework for these redesigned benchmarks, and identify new areas in need of benchmarking. The task force recommended that NASFAA benchmark three areas:

- Administrative Capability
- Outsourcing
- Financial Aid Office Campus Relations

The task force also recommended combining the previous NASFAA Staffing and Salary Surveys into one survey and distributing this new survey to survey sample groups instead of primary contacts at member institutions. The task force recommended annual completion of the new survey for at least the first three years. NASFAA's Board of Directors approved these recommendations in March 2015.

Journal of Student Financial Aid

For nearly 45 years, NASFAA's Journal of Student Financial Aid (JSFA) has been the only peer-reviewed journal in the nation dedicated to research in student financial aid for postsecondary education. JSFA brings scholarly work to bear on the practice and theory of providing financial assistance to students pursuing postsecondary education. JSFA content has had more than 52,000 downloads since NASFAA archived all content in June 2013.

The JSFA editorial team met in December 2014 for strategic planning and to set goals and objectives for 2014-15 and 2015-16 activities. Topics discussed included communication and outreach, engaging the NASFAA membership, soliciting more high-quality articles, developing annual editorial board training, content development, and making JSFA more relevant to practitioners. Accomplishments resulting from these strategic planning efforts include the following:

- Expanded the Editorial Board of the Journal of Student Financial Aid from 21 to 37 members by adding 15 practitioner reviewers.
- Moved to an annual appointment and re-appointment model for the editorial board, wherein reviewers will need to complete annual training in order to remain on the board.
- Developed a communications plan to highlight the work of the JSFA and expand its outreach.
- Took steps to index the JSFA with an impact factor (i.e., a measure of JSFA use and quality) through Thompson-Reuters
- Created a plan for a JSFA special issue focused on HEA reauthorization.

Performance Metrics

Users downloaded 30,279 JSFA articles during the 2014-15 fiscal year. The most often downloaded JSFA article, "A History of Financial Aid to Students," by Matthew Fuller, has been downloaded 1,133 times.

Special Issue

In fall 2015, NASFAA will publish a special issue of JSFA focusing on the 50th anniversary of the Higher Education Act of 1965. Because the 50th anniversary coincides with the forthcoming HEA reauthorization, the project will be both retrospective and prospective, allowing engagement of both senior and rising scholars and practitioners who have extensive knowledge of the policy landscape. Dr. Laura Perna, University of Pennsylvania, will serve as a guest editor. NASFAA will publish the issue in early November 2015 in conjunction with the ASHE annual forum. Special issue authors will share their work as part of an ASHE symposium, bringing greater visibility to the JSFA.

Practitioner Focus

The JSFA editorial team appointed an associate editor for practice (AEP) in 2013 with the objective of developing an infrastructure for making the scholarly work published by the JSFA more relevant to practitioners. The AEP undertook several initiatives toward this end in 2014-15, including revising training materials for editorial board members and developing a resource guide for practitioners on how to use research.



FINANCIALS

3 699	5 080	390	7
139	241	1208	29
44252	49044		

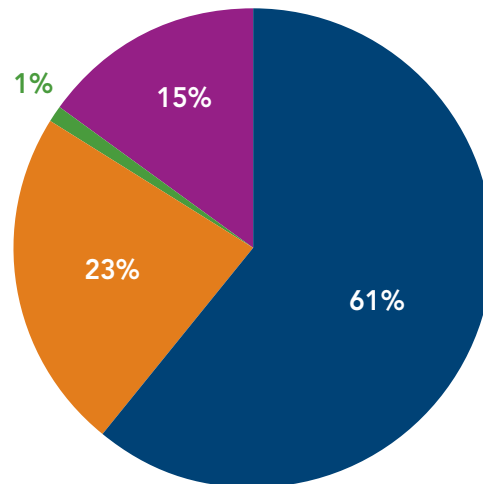
Sound Fiscal Footing

In 2014-15, NASFAA continued to exceed its budget projections and constrain administrative costs to ensure that the majority of dollars spent are in support of our members.

In fiscal year 2015 (July 1, 2014 - June 30, 2015), NASFAA devoted 76 percent of its expenditures to membership programs, training, meetings, communications, and advocacy. NASFAA spent an additional 5 percent on developing new projects and initiatives such as the completely overhauled and redeveloped NASFAA.org (unveiled in June 2015) and the Compliance Engine and Policies and Procedures Builder tools (forthcoming in 2016).

NASFAA has once again succeeded in keeping overhead and administrative expenses low and channeling funds instead into direct member benefits. Administrative costs amounted to 19 percent this past year, compared to about 17 percent in FY14 and 20 percent in FY13 (considerably less than the 26 percent average reported by other nonprofits in the American Society of Association Executives' 2012 Operating Ratio Report).

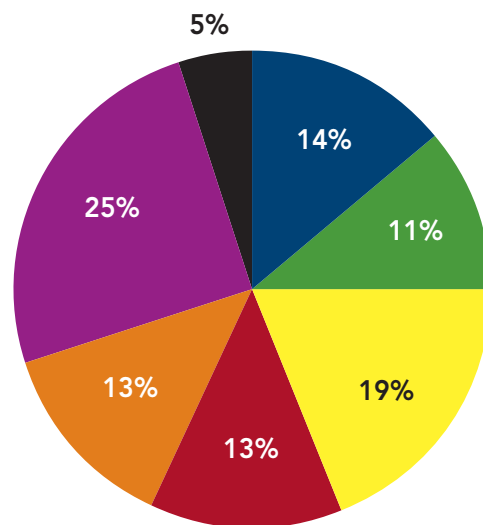
NASFAA Revenue



- Membership Dues
- Conference & Meetings
- Grants & Research
- Training & Programs

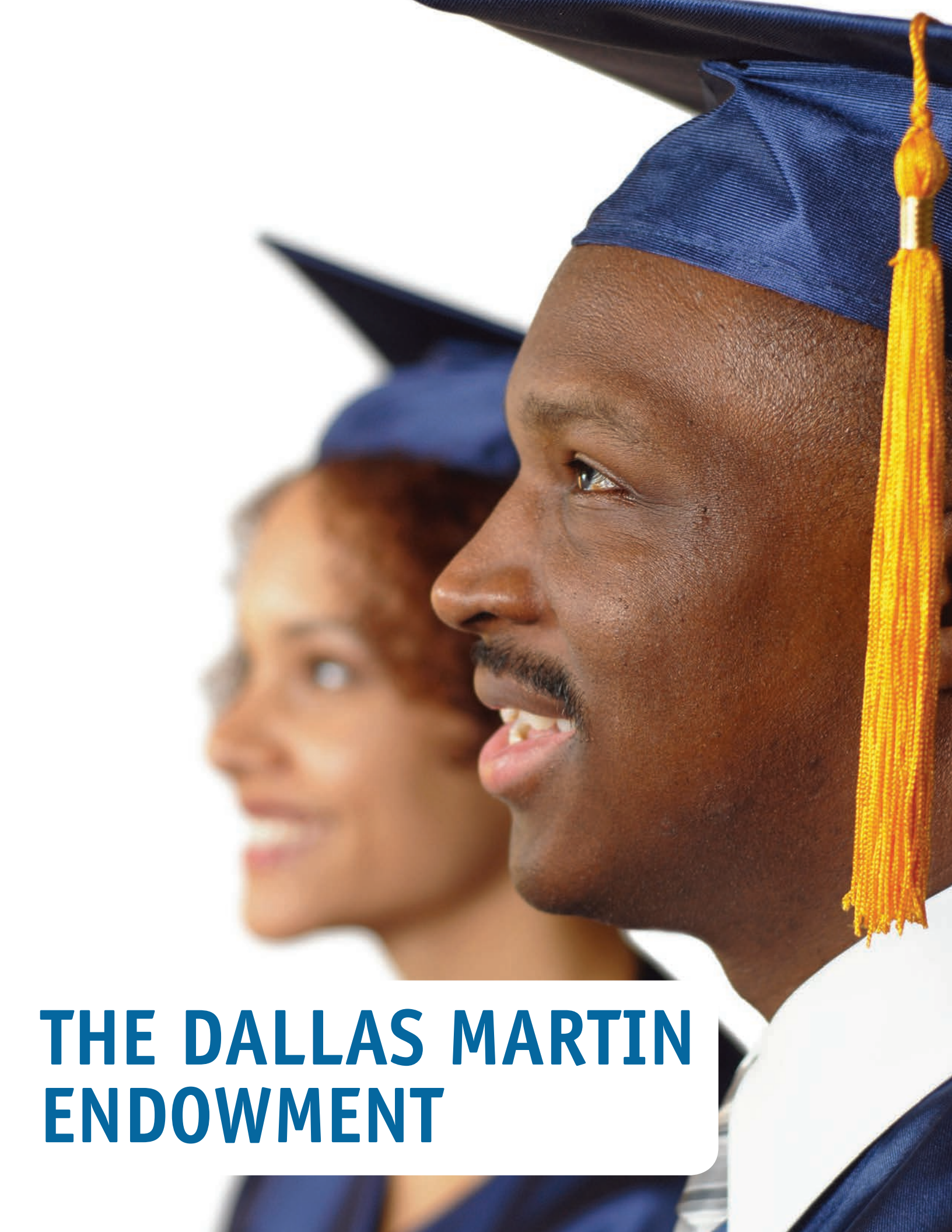
Total Operating Revenue:
\$7.8 million

NASFAA Expenditures



- Membership Support
- Advocacy
- Administrative & General
- Communications & Web Expenses
- Conference & Meetings
- Programs & Training
- New Program Development

Total Operating Expenditures:
\$7.3 million



**THE DALLAS MARTIN
ENDOWMENT**

Inspiring Future Advocates

NASFAA created the Dallas Martin Endowment (DME) for Public Policy and Student Aid to help cultivate the next generation of student aid advocates. Key among the endowment's projects is an ongoing professional development initiative providing internships to upper-division undergraduate and graduate students with an interest in financial aid, including policy analysis and/or research. So far, the fund has brought four very talented interns to D.C. for the summer program.



Angel Flores
(Summer 2015)



Blondeen Philomond
(Summer 2014)



Charlotte Etier
(Summer 2013)



Margot O'Meara
(Summer 2012)

DME reached its initial fundraising goal of \$300,000 in 2013-14, in part through a significant investment by NASFAA's Board of Directors from NASFAA's reserves. To date, 991 individuals have donated to DME, and you can download a full list of donors at nasfaa.org/give.

In 2014-15, despite no specific fundraising initiative, the DME received nine donations:

Diamond Level \$1,000 or more

- Edson Sample, NASFAA Retiree

Platinum Level (\$500 to \$999)

- Justin Draeger, NASFAA

Gold Level (\$100 to \$499)

- Robin Thompson, Pitzer College

Silver Level Up to \$99

- Debbie Brooks, Central Piedmont Community College
- Eileen Brzozowski, Eastern Florida State College
- Nancy Farmer, Independent 529 Plan
- David Godow, Advisory Board Company
- Susan McCrackin, The College Board
- Jeffrey Penta, Southern New Hampshire University

In 2015-16, NASFAA has reenergized its DME fundraising, with t-shirt sales at the National Conference and fundraising around the October 2015 Ragnar Relay running team.

For a full list of all DME donors since the program's inception, go to www.nasfaa.org/Give.

COMMITTEES AND TASK FORCES





Maximizing NASFAA's Impact

Every year, NASFAA task force, committee, and editorial board members give their time, talent, knowledge and experience to support and promote the goals of the Association and the vision of the national chair. NASFAA salutes the more than 200 volunteers who helped us advance our goals in 2014-15. To learn more about volunteering with NASFAA, visit www.nasfaa.org/volunteer_opportunities.

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JOIN US IN WASHINGTON DC AS WE CELEBRATE



A HALF CENTURY OPENING DOORS TO EDUCATIONAL OPPORTUNITY

Nearly 3,000 financial aid professionals from across the country attend the NASFAA National Conference each year to learn, network, and share best practices. The Conference offers a wide array of sessions and programming for experienced, intermediate, and beginning financial aid professionals. Nowhere else can you get the depth and breadth of professional development opportunities all in one place!

★ **2016 NASFAA Conference**
Washington, DC - July 10-13, 2016

★ **2017 NASFAA Conference**
San Diego, CA - June 26-29, 2017

★ **2018 NASFAA Conference**
Austin, TX - June 24-27, 2018

★ **2019 NASFAA Conference**
Orlando, FL - June 24-27, 2019



NASFAA's 50th ANNIVERSARY TIME CAPSULE



Since its inception 50 years ago, NASFAA has helped thousands of students reach their higher education goals. Imagine how far NASFAA will lead us in the next 50 years!

Help us reflect on our past and look to our future. Memories and artifacts are being gathered for the first-ever NASFAA Time Capsule, which will be sealed at the 2016 NASFAA Conference and reopened in 50 years.

All memories and artifacts must be received by February 15, 2016, to be considered for inclusion in the time capsule.

Suggested Items:

- Photos
- Financial Aid Memories (typed)
- Funny Financial Aid Stories (typed)
- Articles and Clippings
- Biographies
- Favorite NASFAA Trinkets
- Financial Aid Day Proclamations
- Books and Other Publications
- Past Anniversary Programs
- Logos
- FAFSAs and Basic Educational Opportunity Grant (BEOG) Charts

Items that Cannot Be Included:

- Disks, USB, CDs and other technologies that may not be around in 50 years
- Rubber bands, staples, and paper clips
- Items larger than 17" x 15" x 1" (The full inside dimensions are 18" x 16" x 9")

Submit Your Artifact Today:

Submission Deadline: February 15, 2016
Submit your artifact online at nasfaa.org/Time_Capsule

Once you've completed the online form, send your hard-copy mementos and artifacts to:

NASFAA
Attn: 50th Anniversary Timeline
1101 Connecticut Avenue, Suite 1100
Washington, DC 20036-4303

If you do not fill out the online form, you must include a cover page with your name, title, school, email and a 100-word (or less) explanation as to why your item should be included in the time capsule.



EXPANDED FOR 2016!

NASFAA LEADERSHIP & LEGISLATIVE CONFERENCE & EXPO

Serving current and future financial aid leaders



WHERE SHOULD YOU START?

ANALYZE YOUR CURRENT SITUATION.

PLAN YOUR STRATEGY.

CHOOSE A PATH.

ENROLLMENT
MANAGEMENT
PATHWAY

NEW & ASPIRING
AID DIRECTORS
PATHWAY

ASSOCIATION
MANAGEMENT
PATHWAY

WHAT IS IT?

A newly expanded, in-person event designed to deliver knowledge, perspective, and insight into management issues facing financial aid leaders today.

WHEN IS IT?

February 22-24, 2016

WHERE IS IT?

Hilton Crystal City at Washington Reagan National Airport, Washington, DC

WHO CAN ATTEND?

Any financial aid professional who wants to grow professionally, expand their network, and become a leader on their campus, association, or profession.

HOW HAS THE CONFERENCE BEEN EXPANDED?

You can choose from **three** pathways, the new *Enrollment Management Pathway*, the *New & Aspiring Aid Directors Pathway* (introduced in 2015), or the *Association Management Pathway*.

- ★ If you are an **experienced financial aid director** and ready to **take the next step in your career**, check out the new Enrollment Management pathway!
- ★ If you are a **new or aspiring aid director** and want to **grow your management skills** so you can run a financial aid office efficiently and effectively, select the New & Aspiring Aid Directors Pathway.
- ★ If you are a **rising volunteer** or want to **become a future volunteer** at the state, regional, or national level, choose the Association Management Pathway.

WHEN WILL MORE INFORMATION BECOME AVAILABLE?

More information will be available this fall, including a detailed agenda and rates. Watch Today's News and your inbox!

www.nasfaa.org/leadership



TIME FOR CHANGE



MISSOURI VALLEY TAPS HIGHEREDGE TO HELP BORROWERS FIND LONG-TERM SOLUTIONS

Missouri Valley College became dissatisfied with its previous default management service when its provider used only short-term tactics to keep borrowers from defaulting. The college switched to TG's HigherEDGE® Default Management Solutions so that its borrowers would instead receive comprehensive counseling that leads to long-term repayment success. Find out how HigherEDGE can help you:

Prepare borrowers to enter repayment | Connect with borrowers whose loans are at risk | Focus on serving your current students

To learn more, visit
HigherEDGE.net/Now.

HigherEDGE®
Default Management Solutions

