



FINDINGS FROM A SURVEY ON THE IMPLEMENTATION OF THE CONSOLIDATED APPROPRIATIONS ACT

NOVEMBER 2021

Introduction

With the passage of the Consolidated Appropriations Act (CAA) in December 2021 came several major student aid policy provisions, including Free Application for Federal Student Aid (FAFSA) simplification and changes to Federal Methodology (FM). These provisions, slated for implementation for the 2024-25 award year, mark some of the most substantial changes to the FAFSA and financial aid in recent years. The Future Act, a bill signed into law December 2019, which will allow the Internal Revenue Service (IRS) to share taxpayer data directly with the Department of Education (ED), will be implemented during the same time period.

In summer 2021, a working group of NASFAA members, with assistance from Oracle Higher Education Development, developed a survey seeking feedback from all types of postsecondary institutions on their preparations for the implementation of FAFSA changes authorized by the CAA. The survey, distributed in September 2021 to 2,592 primary contacts at NASFAA member institutions, reflects NASFAA member institutions' feelings of readiness for these changes to take place, as well as their confidence levels in both the ability of their financial aid management software systems and ED to implement the new provisions.

Key Findings

In general, when asked about their confidence level related to forthcoming implementation of the FAFSA changes, about 25% of respondents said they are completely or fairly confident ED will be able to successfully implement the changes. Most respondents, around 60%, said they only feel somewhat or slightly confident in ED's ability to successfully implement the changes. When asked about their financial aid management software providers' ability to adapt to the changes, a combined 40% were completely (9%) or fairly confident (31%), meaning they don't see any significant issues arising with their software provider due to the changes, such as delayed software updates, or technical glitches. When asked about their own institutions' preparedness, the number who were completely or fairly confident jumped to 68%. The only significant outliers among the respondents relating to ED's preparedness were proprietary institutions, who gave ED much higher marks, with around 40% saying they were completely or fairly confident in ED's preparedness for implementation, and they also had more confidence in their own offices' ability to navigate the changes. Members who only work with graduate and professional students reported slightly higher levels of confidence in ED's implementation abilities as well, which could be explained by the fact that most of their students won't be affected by the changes, as they're not eligible for aid types that are calculated through FM methodology.

Expectedly, as the changes are still a few FAFSA cycles out, more than half of the respondents' institutions (52%) have not started preparing for the changes to FM. For those that have begun to prepare, 30% said they have begun to educate staff members of the upcoming changes, 31% have started assessing their institutions' current practices and how the changes may affect those practices, and 15% have started having conversations with institution administrators, like the president or provost, about the changes.

When asked which aspects of the CAA changes they anticipate will be the most challenging, and upon being given the opportunity to select multiple options, 74% of respondents indicated the shift from using the Estimated Family Contribution (EFC) to the Student Aid Index (SAI) and 61% said adapting to the new Pell eligibility formula for maximum and minimum Pell amounts. The third highest ranking concern, with 35% of responses, was the simplified FM (e.g., elimination of FAFSA questions and data elements in the formula).

The survey asked about members' technology concerns related to the upcoming changes as well, particularly related to how confident they feel about their financial aid management systems' adaptability. Members were asked which software they use currently, to which the overwhelming majority reported using one of three major software systems: 50% reported using Ellucian products, which also includes Banner, Colleague (Datatel/Sungard), and PowerCampus; 18% reported using PowerFaid; and 13% use Oracle products (e.g., PeopleSoft Campus Solutions, Student Cloud, and SFP). In light of the changes that are taking place, aid administrators were asked how confident they are in their financial aid management solution vendor's ability to adapt and meet their needs, to which 66% said they were fairly or somewhat confident, only 9% said they were completely confident, and 6% said not confident at all. The biggest requests respondents had of their software providers were: earlier availability of new functionality, more detailed documentation, and more effective training. Given the overall approval of their software providers, it came as no surprise that 85% of member respondents said they were unlikely or very unlikely to switch software providers in order to meet new requirements of the CAA changes.

Methodology

In summer 2021, NASFAA staff — along with Oracle Higher Education Development and NASFAA’s [FAFSA Simplification Implementation Working Group](#) — developed a survey seeking feedback from all types of postsecondary institutions on their preparations for the implementation of FAFSA changes authorized by the CAA. This 12-question online survey was then tested by NASFAA’s [Rapid Response Network](#) (RRN) for both survey functionality and question clarity. The feedback from the RRN was used to update the instrument to its final version.

NASFAA distributed the survey on September 15, 2021 to 2,592 primary contacts at NASFAA member institutions. A reminder email was sent on September 27, 2021, and the survey was closed on September 29, 2021. There were 435 survey respondents who answered at least one survey question, resulting in a 17% response rate. NASFAA’s Research Department examined the survey results:

- Overall.
- By an institution’s 12-month full-time equivalent (FTE) enrollment (defined by the Integrated Postsecondary Education Data System, known as IPEDS).
- By the percent of undergraduate students awarded Pell Grants (defined by IPEDS).
- By an institution’s use of Institutional Methodology (IM) (as indicated in the survey question “Does your institution use institutional methodology?”).
- By institutional sector (as defined by NASFAA using IPEDS’s “sector of institution” variable).

There were no significant differences observed when looking at an institution’s 12-month FTE enrollment, the percent of undergraduate students awarded Pell Grants, or an institution’s use of IM, so those breakouts are not included in this report. Overall responses can be found in Appendix A, and responses by institutional sector can be found in Appendix B.

Aggregate responses were shared with Oracle Higher Education Development and the FAFSA Simplification Implementation Working Group and they, along with NASFAA, authored the overall findings.

For more questions on our methodology or survey instrument please contact NASFAA’s Research Department at Research@nasfaa.org

Conclusion and Next Steps

Overall, the data were relatively expected as institutions expressed medium levels of confidence in the ability of ED, software providers, and their own institutions and financial aid offices to implement the changes included in the CAA. Past changes to financial aid statute and regulation have not always gone as seamlessly as hoped, and as such, it was not surprising to see that institutions were generally more confident in their institutions and their software providers than they were in ED’s ability to implement the rollout of the new changes smoothly.

Many of the biggest concerns for aid administrators were the shift from EFC to SAI, the new Pell eligibility formula, and the simplification of the FM formula. These results were unsurprising, as these items are also some of the most robust changes created by the CAA, and will take some time to adapt to, for all involved parties. The adoption of these new changes will require cooperation and patience, not only from institutions, but from software providers and ED.

Respondents suggested that financial aid software providers could best support financial aid offices through the upcoming changes by making new functionality available earlier, providing more detailed documentation, and offering more effective training. These asks from financial aid offices will require significant collaboration between ED and software providers, as software providers can do little without guidance from ED.

We’re currently at the very beginning stages of the implementation process, but this survey highlights some steps ED and software providers can take to prepare, as well as to let financial aid offices gage their preparedness compared to other institutions as we continue to monitor the progress of the CAA changes.

Appendix A: Overall Results

How confident are you in the following aspects of the implementation of changes to the Federal Methodology (FM) FAFSA changes authorized by the Consolidated Appropriations Act (CAA)?

	Completely confident	Fairly confident	Somewhat confident	Slightly confident	Not confident at all	n
Department of Education’s release of timely, helpful guidance	3%	21%	35%	27%	14%	435
Department of Education’s release of timely training opportunities	4%	19%	29%	30%	18%	435
Department of Education’s release of timely, helpful technical specifications	2%	18%	30%	32%	18%	435
Your current financial aid management solution vendor / homegrown system’s ability to provide timely updates	9%	31%	27%	23%	10%	431
Your office’s capacity to navigate change	24%	44%	19%	11%	3%	434

Please select which provider of financial aid management software system your office uses.

Campus Management or Financier	3%
Ellucian, including: Banner, Colleague (Datatel/Sungard), PowerCampus	50%
Empower	1%
Jenzabar	3%
Oracle, including: PeopleSoft Campus Solutions, Student Cloud, or SFP	13%
Regent	1%
The College Board: PowerFAIDS	18%
Workday	0%
Homegrown/Legacy	3%
None	1%
Other (Please specify below.)	8%
n	434

Of the 8% of respondents who indicated “Other”, 7% listed explanatory text. Of those 32 respondents:

- 35% (11) listed miscellaneous systems or other answers
- 29% (10) indicated they were currently using one system but would be changing to another in the future.
- 19% (6) listed Unit4 CAMS
- 9% (3) listed FAME
- 6% (2) listed using two systems simultaneously

How is your institution currently preparing for the changes to the Federal Methodology (FM) FAFSA changes authorized by the Consolidated Appropriations Act (CAA)? (Check all that apply.)

We have not yet begun	52%
Educating staff on FM changes	30%
Assessing how current practices will change	31%
Hiring consultants	1%
Engaging our solution end-user group	1%
Discussing options with our technology solution provider	7%
Discussing and planning with higher administration within the institution (e.g., president, provost, vice president, etc.)	15%
Other (Please specify below.)	4%
n	413

Of the 8% of respondents who indicated “Other”, 4% listed explanatory text. Of those 16 respondents most indicated they worked with only graduate and/or professional students, and their student populations are only eligible to receive federal direct unsubsidized loans, meaning they’ll be unaffected by any FM changes, or they work at a regional campus, and the discussion isn’t happening at their institution/location. Some respondents indicated they are still collecting information, discussing and learning how these changes will impact their population, or working with an outside vendor.

What aspects of the CAA do you anticipate will be the most challenging? (Check all that apply.)

Shift from Estimated Family Contribution to Student Aid Index	74%
A new Pell eligibility formula for maximum and minimum Pell amounts	61%
Simplified Federal Methodology (e.g., elimination of FAFSA questions and data elements in the formula)	35%
Repeal of limitations on subsidized loan eligibility for undergraduate Direct Loans	10%
Expanded Pell Grant eligibility for incarcerated students	16%
Other (Please specify below.)	8%
n	402

Of the 8% of respondents who indicated “Other”, almost all listed explanatory text. Of those 31 respondents:

- 29% (9) listed concerns about the elimination of the number of students in college when calculating the student’s SAI.
- 16% (5) listed concerns about Pell Grant eligibility.
- 16% (5) listed general communication concerns, either across campus or with students and parents.
- 16% (5) listed they do not anticipate anything to be challenging at this time.
- 6% (2) listed concerns about how these changes will impact the awarding of need based aid for students.
- 16% (5) listed another miscellaneous concern

What aspects of the CAA do you anticipate will pose the greatest challenge from a technology perspective? (Check all that apply.)

Shift from Estimated Family Contribution to Student Aid Index	69%
A new Pell eligibility formula for maximum and minimum Pell amounts	58%
Simplified Federal Methodology (e.g., elimination of FAFSA questions)	37%
Repeal of limitations on subsidized loan eligibility for undergraduate Direct Loans	16%
Expanded Pell Grant eligibility for incarcerated students	10%
n	383

If financial aid requirements and rules continue to change rapidly as they have over the past few years, how confident are you in your financial aid management solution vendor's ability to adapt and meet your needs?

Completely confident	9%
Fairly confident	39%
Somewhat confident	27%
Slightly confident	18%
Not confident at all	6%
n	411

What are the top three ways financial aid management solution providers help institutions feel more confident about their ability to implement changes? (Please choose up to three.)

Earlier availability of new functionality	69%
More detailed documentation	61%
More effective training	54%
Better communication	31%
Enable end users to modify the solution	15%
Greater configurability	20%
Other (Please specify below.)	3%
Engagement of users in development and testing	30%
n	371

Of the 3% of respondents who indicated "Other", almost all listed explanatory text. Of those 10 respondents, several listed they were using homegrown systems.

How likely is your institution to consider a new financial aid management solution in order to meet the CAA requirements?

Very likely	3%
Likely	3%
Neutral	8%
Unlikely	21%
Very unlikely	64%
n	371

How well does your financial aid management solution meet the NASFAA best practice recommendations?

	Extremely well	Very well	Moderately well	Slightly well	Not well at all	Unsure / Don't Know	n
Ability to develop custom aid offers on a school or student level	13%	31%	27%	11%	13%	5%	360
Systems that are tested by end users	14%	29%	24%	11%	6%	15%	357
Includes tools that can be easily used by non-technical financial aid staff end-users without IT expertise to customize, modify, and update aid offers	7%	16%	27%	22%	23%	4%	359
Easy to use and implement	5%	20%	36%	23%	12%	4%	360
Consumer-tested, easy to use self-service portals	6%	20%	27%	21%	14%	13%	356
Consistent communication of aid offers across modalities (mobile, pdf, portal, etc.)	6%	19%	23%	19%	20%	13%	355
Active end-user advisory groups that include financial aid administrators, students, and other stakeholders	11%	19%	23%	16%	12%	19%	355
Base software package enables institutions to comply with NASFAA Code of Conduct	11%	34%	27%	9%	4%	15%	355
Software consistently uses the term "financial aid offer"	11%	23%	17%	15%	15%	19%	354

Does your institution use institutional methodology?

Yes	20%
No	80%
n	367

Is your institution considering adding the use of institutional methodology in anticipation of the implementation of changes to the Federal Methodology (FM) FAFSA changes authorized by the Consolidated Appropriations Act (CAA)?

Yes	10%
No	90%
n	287

If you have any additional feedback you would like to share regarding your preparations for the implementation of FAFSA changes authorized by the Consolidated Appropriations Act please use the space below to do so.

Approximately 5% of survey respondents left a comment in the open-ended comments section (n=20). Of those respondents:

- 30% (6) indicated needing more technical information for their office or for their software provider to successfully implement the FAFSA changes authorized by the Consolidated Appropriations Act.
- 15% (3) indicated they were not concerned about implementation changes or that it was too early for them to know if there were concerns.
- 15% (3) indicated that their concern was with ED's ability to implement upcoming changes, and how that may affect their financial aid management system's ability to implement the changes.
- 10% (2) listed concerns about the elimination of the number of students in college.
- 15% (3) listed concerns about Pell Grant eligibility changes.
- 10% (2) listed other miscellaneous comments.

Appendix B: Results by Institutional Sector

Any question with a sample size of less than ten responses is not displayed.

How confident are you in the following aspects of the implementation of changes to the Federal Methodology (FM) FAFSA changes authorized by the Consolidated Appropriations Act (CAA)?

Nonprofit Institutions

	Completely confident	Fairly confident	Somewhat confident	Slightly confident	Not confident at all	n
Department of Education's release of timely, helpful guidance	2%	23%	35%	27%	14%	200
Department of Education's release of timely training opportunities	3%	18%	35%	29%	15%	200
Department of Education's release of timely, helpful technical specifications	2%	18%	34%	30%	18%	200
Your current financial aid management solution vendor / homegrown system's ability to provide timely updates	7%	34%	29%	21%	9%	196
Your office's capacity to navigate change	19%	47%	20%	13%	2%	200

Community Colleges

	Completely confident	Fairly confident	Somewhat confident	Slightly confident	Not confident at all	n
Department of Education's release of timely, helpful guidance	2%	22%	34%	31%	12%	110
Department of Education's release of timely training opportunities	4%	19%	28%	33%	16%	110
Department of Education's release of timely, helpful technical specifications	2%	16%	32%	33%	17%	110
Your current financial aid management solution vendor / homegrown system's ability to provide timely updates	7%	29%	25%	28%	11%	110
Your office's capacity to navigate change	21%	42%	17%	14%	6%	109

Public 4-Year Institutions

	Completely confident	Fairly confident	Somewhat confident	Slightly confident	Not confident at all	n
Department of Education’s release of timely, helpful guidance	3%	17%	30%	30%	20%	90
Department of Education’s release of timely training opportunities	2%	17%	23%	32%	26%	90
Department of Education’s release of timely, helpful technical specifications	2%	17%	21%	38%	22%	90
Your current financial aid management solution vendor / homegrown system’s ability to provide timely updates	8%	27%	26%	27%	13%	90
Your office’s capacity to navigate change	27%	41%	22%	7%	3%	90

Proprietary Institutions

	Completely confident	Fairly confident	Somewhat confident	Slightly confident	Not confident at all	n
Department of Education’s release of timely, helpful guidance	19%	14%	38%	10%	19%	21
Department of Education’s release of timely training opportunities	19%	19%	19%	24%	19%	21
Department of Education’s release of timely, helpful technical specifications	10%	29%	19%	29%	14%	21
Your current financial aid management solution vendor / homegrown system’s ability to provide timely updates	33%	14%	19%	19%	14%	21
Your office’s capacity to navigate change	52%	33%	10%	5%	0%	21

Graduate and Professional Members

	Completely confident	Fairly confident	Somewhat confident	Slightly confident	Not confident at all	n
Department of Education’s release of timely, helpful guidance	7%	21%	71%	0%	0%	14
Department of Education’s release of timely training opportunities	7%	36%	14%	29%	14%	14
Department of Education’s release of timely, helpful technical specifications	0%	36%	50%	14%	0%	14
Your current financial aid management solution vendor / homegrown system’s ability to provide timely updates	14%	50%	36%	0%	0%	14
Your office’s capacity to navigate change	43%	50%	7%	0%	0%	14

Please select which provider of financial aid management software system your office uses.

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate / Professional
Campus Management or Financier	4%	1%	0%	25%	0%
Ellucian, including: Banner, Colleague (Datatel/Sungard), PowerCampus	45%	61%	57%	25%	36%
Empower	1%	1%	0%	0%	7%
Homegrown/Legacy	2%	2%	4%	5%	0%
Jenzabar	4%	5%	0%	0%	7%
Oracle, including: PeopleSoft Campus Solutions, Student Cloud, or SFP	6%	8%	37%	0%	14%
Regent	1%	0%	0%	5%	0%
The College Board: PowerFAIDS	30%	12%	0%	15%	29%
Workday	1%	0%	0%	0%	0%
None	1%	3%	0%	0%	0%
Other (Please specify below.)	9%	8%	2%	25%	7%
n	200	110	90	20	14

How is your institution currently preparing for the changes to the Federal Methodology (FM) FAFSA changes authorized by the Consolidated Appropriations Act (CAA)? (Check all that apply.)

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate / Professional
We have not yet begun	53%	59%	43%	35%	50%
Educating staff on FM changes	32%	24%	33%	35%	17%
Discussing and planning with higher administration within the institution (e.g., president, provost, vice president, etc.)	18%	10%	18%	20%	0%
Assessing how current practices will change	26%	27%	42%	45%	33%
Hiring consultants	2%	0%	0%	0%	0%
Engaging our solution end-user group	1%	2%	4%	0%	0%
Discussing options with our technology solution provider	6%	7%	6%	15%	8%
Other (Please specify below.)	3%	4%	4%	5%	17%
n	194	103	84	20	12

What aspects of the CAA do you anticipate will be the most challenging? (Check all that apply.)

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate / Professional
Shift from Estimated Family Contribution to Student Aid Index	71%	78%	84%	65%	50%
A new Pell eligibility formula for maximum and minimum Pell amounts	61%	64%	67%	55%	8%
Simplified Federal Methodology (e.g., elimination of FAFSA questions and data elements in the formula)	35%	27%	46%	25%	42%
Repeal of limitations on subsidized loan eligibility for undergraduate Direct Loans	11%	9%	12%	0%	0%
Expanded Pell Grant eligibility for incarcerated students	10%	29%	18%	0%	0%
Other (Please specify below.)	10%	3%	10%	5%	25%
n	184	103	83	20	12

What aspects of the CAA do you anticipate will pose the greatest challenge from a technology perspective? (Check all that apply.)

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate/ Professional
Shift from Estimated Family Contribution to Student Aid Index	70%	72%	68%	50%	-
A new Pell eligibility formula for maximum and minimum Pell amounts	58%	61%	59%	60%	-
Simplified Federal Methodology (e.g., elimination of FAFSA questions)	40%	31%	38%	40%	-
Repeal of limitations on subsidized loan eligibility for undergraduate Direct Loans	13%	17%	25%	5%	-
Expanded Pell Grant eligibility for incarcerated students	5%	19%	11%	0%	-
n	176	98	81	20	-

If financial aid requirements and rules continue to change rapidly as they have over the past few years, how confident are you in your financial aid management solution vendor's ability to adapt and meet your needs?

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate / Professional
Completely confident	6%	10%	7%	35%	17%
Fairly confident	43%	32%	38%	30%	67%
Somewhat confident	31%	29%	24%	10%	8%
Slightly confident	15%	21%	23%	20%	8%
Not confident at all	5%	8%	8%	5%	0%
n	192	103	84	20	12

What are the top three ways financial aid management solution providers help institutions feel more confident about their ability to implement changes? (Please choose up to three.)

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate / Professional
Earlier availability of new functionality	65%	71%	77%	72%	50%
More detailed documentation	64%	67%	49%	61%	70%
More effective training	58%	53%	49%	44%	50%
Better communication	27%	35%	33%	44%	20%
Enable end users to modify the solution	15%	11%	21%	11%	20%
Greater configurability	20%	19%	19%	11%	30%
Engagement of users in development and testing	33%	26%	29%	28%	30%
Other (Please specify below.)	2%	2%	6%	0%	10%
n	176	89	78	18	10

How likely is your institution to consider a new financial aid management solution in order to meet the CAA requirements?

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate / Professional
Very likely	3%	1%	3%	11%	0%
Likely	2%	4%	1%	17%	0%
Neutral	8%	8%	10%	11%	0%
Unlikely	26%	17%	18%	17%	20%
Very unlikely	61%	70%	68%	44%	80%
n	175	89	78	18	10

How well does your financial aid management solution meet the NASFAA best practice recommendations?*

Non-profit Institutions:

	Extremely well	Very well	Moderately well	Slightly well	Not well at all	Unsure / Don't Know	n
Ability to develop custom aid offers on a school or student level	15%	35%	24%	11%	11%	5%	170
Systems that are tested by end users	13%	34%	22%	10%	6%	15%	168
Includes tools that can be easily used by non-technical financial aid staff end-users without IT expertise to customize, modify, and update aid offers	9%	17%	26%	22%	21%	4%	170
Easy to use and implement	5%	24%	36%	24%	9%	3%	170
Consumer-tested, easy to use self-service portals	7%	19%	30%	20%	12%	12%	168
Consistent communication of aid offers across modalities (mobile, pdf, portal, etc.)	7%	19%	25%	20%	18%	12%	166
Active end-user advisory groups that include financial aid administrators, students, and other stakeholders	10%	22%	21%	14%	11%	22%	166
Base software package enables institutions to comply with NASFAA Code of Conduct	10%	36%	27%	5%	4%	19%	166
Software consistently uses the term "financial aid offer"	12%	25%	13%	12%	13%	25%	165

*The sample size for graduate/professional institution members to this question is less than ten, so their break-out is not provided.

Community Colleges:

	Extremely well	Very well	Moderately well	Slightly well	Not well at all	Unsure / Don't Know	n
Ability to develop custom aid offers on a school or student level	9%	22%	41%	10%	10%	7%	87
Systems that are tested by end users	11%	26%	24%	16%	6%	16%	87
Includes tools that can be easily used by non-technical financial aid staff end-users without IT expertise to customize, modify, and update aid offers	6%	9%	27%	30%	23%	5%	86
Easy to use and implement	5%	9%	40%	23%	17%	6%	87
Consumer-tested, easy to use self-service portals	3%	21%	24%	28%	11%	13%	87
Consistent communication of aid offers across modalities (mobile, pdf, portal, etc.)	6%	18%	24%	17%	21%	14%	87
Active end-user advisory groups that include financial aid administrators, students, and other stakeholders	8%	14%	24%	21%	14%	20%	87
Base software package enables institutions to comply with NASFAA Code of Conduct	10%	31%	31%	9%	3%	15%	87
Software consistently uses the term "financial aid offer"	8%	24%	18%	18%	15%	16%	87

Public 4-year Institutions:

	Extremely well	Very well	Moderately well	Slightly well	Not well at all	Unsure / Don't Know	n
Ability to develop custom aid offers on a school or student level	10%	30%	25%	12%	19%	4%	77
Systems that are tested by end users	13%	21%	32%	13%	7%	14%	76
Includes tools that can be easily used by non-technical financial aid staff end-users without IT expertise to customize, modify, and update aid offers	4%	14%	31%	13%	32%	5%	77
Easy to use and implement	1%	19%	32%	26%	17%	4%	77
Consumer-tested, easy to use self-service portals	4%	13%	29%	19%	23%	12%	75
Consistent communication of aid offers across modalities (mobile, pdf, portal, etc.)	5%	17%	21%	21%	24%	12%	76
Active end-user advisory groups that include financial aid administrators, students, and other stakeholders	13%	20%	25%	18%	12%	12%	76
Base software package enables institutions to comply with NASFAA Code of Conduct	11%	32%	30%	16%	4%	8%	76
Software consistently uses the term "financial aid offer"	8%	21%	22%	18%	18%	12%	76

Proprietary Institutions

	Extremely well	Very well	Moderately well	Slightly well	Not well at all	Unsure / Don't Know	n
Ability to develop custom aid offers on a school or student level	12%	47%	6%	24%	12%	0%	17
Systems that are tested by end users	24%	35%	18%	6%	0%	18%	17
Includes tools that can be easily used by non-technical financial aid staff end-users without IT expertise to customize, modify, and update aid offers	12%	29%	24%	29%	6%	0%	17
Easy to use and implement	18%	41%	18%	18%	6%	0%	17
Consumer-tested, easy to use self-service portals	18%	35%	6%	12%	6%	24%	17
Consistent communication of aid offers across modalities (mobile, pdf, portal, etc.)	12%	24%	24%	12%	18%	12%	17
Active end-user advisory groups that include financial aid administrators, students, and other stakeholders	18%	18%	35%	0%	12%	18%	17
Base software package enables institutions to comply with NASFAA Code of Conduct	29%	24%	18%	18%	6%	6%	17
Software consistently uses the term "financial aid offer"	24%	12%	24%	18%	12%	12%	17

Does your institution use institutional methodology?

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate/ Professional
Yes	29%	11%	6%	38%	20%
No	71%	89%	94%	63%	80%
n	174	89	78	16	10

Is your institution considering adding the use of institutional methodology in anticipation of the implementation of changes to the Federal Methodology (FM) FAFSA changes authorized by the Consolidated Appropriations Act (CAA)?

	Nonprofit	Community Colleges	Public 4-Yr	For Profit	Graduate/ Professional
Yes	13%	5%	7%	30%	-
No	88%	95%	93%	70%	-
n	120	78	71	10	-

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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.

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