

NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

# ANNUAL REPORT

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# 2019/20

## NASFAA

is the largest postsecondary education association with institutional membership in Washington, DC, 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 postsecondary education. No other national association serves the needs of the financial aid community better or more effectively.

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# NASFAA's 2019/20 Board of Directors

The NASFAA Board of Directors is the governing body of the association. It is responsible for establishing broad policies and for the general conduct of the affairs of the association, provides oversight and guidance for its future direction, and directs the work of NASFAA's committees.

The board has 21 members: three officers (the national chair, chair-elect, and immediate past national chair), who serve one-year terms; six representatives-at-large, who serve two-year terms; six regional representatives, who serve a one-year term; the treasurer, who serves a one-year term; three nonvoting commission directors, who serve a one-year term; the president of the association, who serves on the board in a nonvoting capacity; and the secretary to the board, who also serves in a nonvoting capacity.

## Elected and Appointed Leadership

- **The National Chair, National Chair-Elect, and Immediate Past National Chair** are the elected officers of the Association. The National Chair-Elect must be elected by a majority vote of the institutional membership and must be an institutional member of NASFAA.
- **Six Regional Representatives**, who must be institutional members of NASFAA, are selected from each recognized regional association (voting).
- **Six National Representatives-At-Large**, who must be institutional members of NASFAA, are elected by vote of the institutional membership without regard to geographical location (voting).
- **The Treasurer** is appointed by the National Chair each year and approved by the board (voting).
- Up to four **Commission Directors** are appointed by the National Chair each year and approved by the Board of Directors (non-voting).
- **The President** is appointed and confirmed by the Board of Directors (non-voting).
- **The Secretary** is appointed by the president (non-voting).

## The 2019/20 NASFAA Board of Directors

### Officers

Paula Luff, Ball State University, national chair  
 Brenda Hicks, Southwestern College, national chair-elect  
 Lori Vedder, University of Michigan - Flint, past national chair  
 Keith Williams, Michigan State University, treasurer

### Regional Representatives

Bryan Erslan, Eastern Kentucky University, SASFAA  
 Lauren Jackson, Northwestern State University, SWASFAA  
 Ashley Munro, University of Alaska Fairbanks, WASFAA  
 Myra Pfannenstiel, Newman University, RMASFAA  
 Marvin Smith, Indiana University-Purdue University (now at University of California, Los Angeles), MASFAA  
 Samantha Veeder, University of Rochester, EASFAA

### Representatives-at-Large

Brad Barnett, James Madison University, (first year)  
 Zita Barree, Hampden-Sydney College, (first year)  
 Marian Dill, Lee University, (second year)  
 Michael Johnson, Columbia Gorge Community College, (second year)  
 Kelly Morrissey, Community College of Rhode Island, (second year)  
 Denise Welch, Panola College, (first year)

### Commission Directors

Andrew Hammontree, Francis Tuttle Technology Center  
 Brent Shock, Miami University  
 Francisco Valines, Florida International University

### Ex Officio

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

### Special Advisor to the Board

Diversity Officer: Craig Slaughter, Kenyon College

# A Message From Our National Chair and Our President

"Look for the helpers" in any time of crisis, Fred Rogers famously counseled his young audience. This good advice cuts close to the heart of NASFAA. Our mission, in essence, is to help — by training and connecting financial aid administrators, advocating for public policies that increase student access and success, fostering diversity, and reflecting the ideals embraced by NASFAA members across the country.

We are extremely proud that when the global pandemic crisis hit the U.S. in March 2020, the first question asked by all the individuals who comprise NASFAA — aid administrators at member schools, our board of directors, and our staff — was, "How can we help?"

Adaptability and responsiveness have been NASFAA's watchwords since the onset of COVID-19 turned everyone's world upside down. From the outset, we knew the disease would send colleges scrambling to best serve their students, student aid recipients would face countless new and complex challenges, and NASFAA would need to stay flexible as conditions changed daily and new information emerged.

In May, the already emotionally laden environment on college campuses and across the nation grew exponentially more difficult as Americans mourned the death of George Floyd and participated in nationwide protests for social justice across the country that still continue.

In response to these critical events, NASFAA took action to adapt, respond, guide, and assist its members:

- Early on, we created a [COVID-19 Web Center](#) to serve as a one-stop resource for all issues related to the virus and relief efforts. The center houses all the latest information financial aid administrators need to help their students: news articles dating back to early March 2020; links to transcripts and recordings of free, on-demand webinars; links to topical episodes of the "Off The Cuff" podcast; a Higher Education Emergency Relief Fund (HEERF) Reference Page, with fast facts and frequently asked questions and answers on the student portion of HEERF; and links to important Department of Education (ED) and congressional references.
- Our board made the difficult decision to cancel NASFAA's in-person National Conference, set for June/July 2020 in Las Vegas, and responded to the feedback from members that they still needed affordable, virtual training. We quickly pivoted to NASFAA's 2020 Summer Training Series, which featured timely updates on hot topics, conversations with government leaders, and other training presented by financial aid peers — all offered in easily digestible "bites" of content to be consumed when it best suited our overburdened members.
- We redoubled our advocacy and support efforts to assist struggling schools and students dealing with the pandemic. Our AskRegs team worked furiously to research and respond to a record-setting landslide of new questions, and our policy team had near-daily discussions with members of Congress and representatives from ED to understand rapidly changing guidance and advocate for additional student/school flexibilities as the weeks wore on.

- As we grieve for all of those in our country who are subjected to ongoing individual and systemic forms of racism, we have committed to examining our own unconscious biases, reinforcing NASFAA's diversity and inclusion principles, and continuing the social justice work inherent in NASFAA's vision: to shape the future through student access and success in higher education — for *all* students.

For greater detail about how NASFAA has adapted its policy and advocacy efforts to address the challenges of the coronavirus, see page 10 of this report. For more information on how we pivoted our training focus away from an in-person National Conference and toward the Summer Training Series, see page 19. And for more detail about how the NASFAA Board of Directors responded and provided critical strategic direction through a time of uncertainty and rapid change, see the Governance report on page 4.

As you consider these details and other updates found in this report, we urge you to give us feedback about how we did in 2019-20, and how we could have done better.

As we move through the 2020-21 academic year, our goals are to keep adapting, keep pulling together, keep being strategic about how to best serve our membership — and most importantly, to keep asking, every day: "How can we help?"



Paula Luff, 2019/20 NASFAA National Chair



Justin Draeger, NASFAA President & CEO



Paula Luff, 2019/20 NASFAA National Chair



Justin Draeger, NASFAA President & CEO

# Governance and Leadership

If the NASFAA Board of Directors adopted a theme for the second half of 2019-20, it could easily be “Leadership Through Change.” July 2019 started out as another successful fiscal year, with NASFAA taking steps to achieve its strategic plans. But March 2020 changed everything — for NASFAA and the entire nation. The weekend before NASFAA’s planned March 9-10 in-person board of directors meeting, the country effectively shut down, making “business-as-usual” a thing of the past.

Throughout the spring and summer, the board, management team, and president of NASFAA rallied and reacted to daily changes to national pandemic information. They discussed, planned, gathered data, strategized, and responded to the developing risks to the association, the nation’s students, the financial aid profession, and the higher education community. And they achieved all this while navigating the personal fears and uncertainty everyone has been coping with surrounding the pandemic.

The 2019-20 NASFAA Board of Directors met once in person in November 2019 and met seven times virtually after the onset of the coronavirus in March 2020. Directors also communicated on a weekly and sometimes daily basis using the board’s online communication portal. They shifted to a cash- and liquidity-focused financial reporting methodology and closely monitored the association’s revenue and expenditures through the early months of the pandemic. A summary of key board votes and actions follows.

## November 4, 2019, Board Meeting Las Vegas, NV

**Audit Approval.** The board voted to approve the clean audit conducted by independent auditor RSM US LLP, as brought forward by the Financial Affairs Committee (FAC).

**2020-21 Dues Approval.** FAC recommended and the board approved a nominal increase in institutional member dues for 2020-21 of \$5 in the base amount (from \$835 to \$840) and .004 in the FTE multiplier (from .091 to .095). This is the first dues increase since 2016. The board also approved an increase in the price of the Webinar Package from \$449 to \$499.

**Conference Budgets.** The board approved the FAC-recommended budgets for both the February 2020 Leadership & Legislative Conference & Expo and the 2020 National Conference. Due to higher meals costs at the site, the National Conference budget included a registration fee increase, the elimination of one networking reception, and a pledge to cover any remaining budget shortfall with a one-time subsidy from board-designated funds.

**Executive Leadership Roundtable 2020 Budget.** The board approved the budget presented by FAC for the February 2020 Roundtable event, which included a \$15,000 subsidy from board-designated funds approved at the June 2019 board meeting.

**Enhanced Loan Counseling Task Force Report Approval.** Given strong bipartisan interest in Congress to require annual federal student loan counseling, NASFAA convened a task force to examine this issue. The board voted to accept the task force’s report and recommendations for ways annual counseling could be implemented effectively without unnecessary burden or repetition for students and institutions.

### March 9, 2020, Virtual Board Meeting

**Diversity Officer Approval.** The board confirmed the appointment of Scott Skaro, director of financial aid at United Tribes Technical College, as NASFAA's diversity officer for two years of service from July 1, 2020, through June 30, 2022.

**Commission Director Approval.** The board confirmed the appointment of Christina Tangelakis, associate dean of financial aid at Glendale College; David Page, vice president for enrollment management at Dillard University; and Nancy Grant, director of financial aid services at Ilisagvik College as commission directors for 2020-21, serving from July 1, 2020, through June 30, 2021.

**Treasurer Approval.** The board confirmed the appointment of Kelly Morrissey, director of financial aid at Community College of Rhode Island, as NASFAA's treasurer and financial affairs committee chair for two years of service from July 1, 2021, through June 30, 2023. Morrissey will begin with a year as FAC vice chair from July 1, 2020, through June 30, 2021.

### April 1, 2020, Virtual Board Meeting

**Pivot to Summer Training Series.** Although the board took no formal vote, discussion at this meeting reflected great concern over the coming in-person National Conference. Board members agreed to replace the 2020-21 in-person conference with a summer webinar series, spread over the course of several weeks to allow NASFAA the flexibility of meeting members' immediate needs in the light of rapidly changing federal guidance and current events.

### April 13, 2020, Virtual Board Meeting

**2020 National Conference Cancellation.** The board voted to cancel the 2020 NASFAA National Conference, planned for June/July 2020, by invoking the "force majeure" clause in our conference contract. The board made this decision after lengthy deliberation and based on the advice of national health advocates, who strongly discouraged nonessential travel. NASFAA leadership decided to pivot to the summer 2020 online training series discussed in the April 1 meeting.

### April 30, 2020, Virtual Board Meeting

**NASFAA Investment Sale and Reallocation.** To secure cash and ensure operational continuity, the board approved a motion brought forward by FAC to liquidate \$500,000 in investment reserves per the recommended investment reallocation put forward by NASFAA's investment advisors.

**Gates Grant Approval.** The board voted to accept a grant in the amount of \$100,000 from the Bill & Melinda Gates Foundation to fund several NASFAA initiatives related to COVID-19, including a webinar series, the creation of handouts and materials as needed, and the expansion of COVID-19-related online training and professional development opportunities.

### May 13, 2020, Virtual Board Meeting

#### Paycheck Protection Program (PPP) Loan Funds

**Approval.** The board voted to accept a PPP loan offered by the U.S. Small Business Administration in the amount of 2.5 months of payroll funds, or \$930,600. NASFAA will seek forgiveness of this loan under provisions of the law.

**ECMC Grant Approval.** The board voted to accept a grant in the amount of \$115,000 from the Education Credit Management Corporation (ECMC) Foundation to update and convert NASFAA's Student Aid Index (SAI) into an open, public-facing, mobile-friendly tool that serves as a central hub of important financial aid regulations, legislation, and resources. Currently, the SAI is a paid benefit of NASFAA membership; this grant will allow NASFAA to make the SAI an open resource available for the public good.

#### Software Providers' Compliance Working Group

**Report Approval.** NASFAA convened this working group to research and analyze the role of student financial aid management software in institutions' ability to provide accurate and clear aid offers. The board accepted and approved the working group's report and recommendations.

#### Administrative Capability Task Force Report

**Approval.** The board charged this task force with exploring legislative and regulatory opportunities to provide better support for financial aid offices to ensure institutions are meeting administrative capability standards. The board accepted and approved the report and recommendations of the task force.



### May 27, 2020, Virtual Board Meeting

**Fiscal Austerity Measures.** Although the board took no formal vote at this meeting, NASFAA leadership provided a fiscal update, noting that the association had secured about \$930,000 in PPP funds, as well as a \$500,000 line of credit via SunTrust. To rein in expenses, most of which are in the salary and rent lines, NASFAA will defer the cost of living increases and bonuses planned for staff in July and will plan a weeklong furlough in December 2020. Ideally, Draeger said, the dues season will be successful, allowing cancellation of the furlough and restoration of the increases/bonuses toward the end of the calendar year.

### June 18, 2020, Virtual Board Meeting

**2020-21 Standing Committee Rosters Approval.** Each year, the board must appoint new members for FAC, the Association Governance Committee, the Ethics Commission, the Nominations and Elections Committee, and the Awards Committee based on the criteria specified in the committee charters. The board voted to approve the rosters as presented.

**“Exploring Ways to Enhance FAFSA Efficiency” Series Approval.** NASFAA received grant funding from the Bill & Melinda Gates Foundation to commission a 10-paper series exploring ways to make the federal student aid application process more efficient and streamlined for applicants and their families. The board voted to accept and approve the recommendations presented as part of the series.



The 2019/20 NASFAA Board of Directors



# Policy and Federal Relations: Advocacy, Research, and Grants

This was an unprecedented year for NASFAA's policy, advocacy, and research work. Not only did we see progress on reauthorization and the passage of a major piece of legislation on FAFSA simplification, but we also quickly shifted to provide around-the-clock advocacy and technical support related to Congress' sweeping COVID-19 response legislation. It was a year of unexpected turns along with progress and wins on several long-term advocacy initiatives, research, and grant work.

## Legislative Advocacy

### Addressing the COVID-19 Crisis

As the [COVID-19 pandemic](#) began disrupting institutions across the country in early March, NASFAA began communicating almost daily with congressional staff about student aid-related requests, primarily related to waivers and flexibilities, to be included in relief legislation. NASFAA had six requests related to flexibilities and waivers and five requests related to student loan borrower relief included in the final [Coronavirus Aid, Relief, and Economic Security \(CARES\) Act](#), passed on March 27, 2020, in addition to several provisions providing flexibility to campus-based programs. Following the passage of the CARES Act, NASFAA continued to communicate regularly with the Department of Education (ED) and congressional staff about implementation concerns and requests for the next supplemental bill.

NASFAA added its voice to more than 15 additional letters sent to Congress by the higher education community making COVID-19-related requests. NASFAA also launched an [advocacy campaign](#) encouraging all members to urge their U.S. Senate representatives to provide additional funds for higher education institutions and students in future COVID-19 relief legislation.

### Momentum Grows Toward HEA Reauthorization

Efforts to reauthorize the Higher Education Act (HEA), which has been due for an update since 2013, picked up speed in both congressional chambers this year. In October 2019, Democratic members of the House Committee on Education & Labor, led by Chairman Bobby Scott (D-VA) introduced a comprehensive HEA reauthorization proposal. The bill — dubbed the [College Affordability Act \(CAA\)](#) — features a number of NASFAA priorities including the elimination of student loan origination fees, increased funding for the Federal Pell Grant and federal campus-based aid programs, and a streamlined student loan repayment system. The bill also includes FAFSA simplification provisions nearly identical to NASFAA's proposal, which would place applicants into one of three application pathways based on income and family characteristics.

A month earlier, Sen. Lamar Alexander (R-TN), chairman of the Senate Health, Education, Labor, & Pensions (HELP) Committee, introduced the [Student Aid Improvement Act \(SAIA\)](#), a narrow HEA reauthorization proposal focused largely on FAFSA simplification. The bill would restructure the need analysis formula by creating a "Student Aid Index" and would qualify students for Pell Grant eligibility largely based on their family size and adjusted gross income relative to the poverty line, and would automatically qualify applicants for maximum Pell Grants if they met specific criteria, such as qualifying for certain means-tested benefits or making too little money to need to file tax returns. The proposal would also require significant, strict standardization of financial aid offers and lift the caps on income-based repayment from the current limit set at a 10-year standard repayment amount.

Neither the CAA nor the SAIA have been voted on by their full chamber, although the CAA did pass out of committee in October 2019. With Alexander retiring at the end of this year, and the coronavirus continuing to disrupt higher education and consume much of Congress' attention, prospects for a full HEA reauthorization remain uncertain.

### **Congress Boosts Maximum Pell Grant and Campus-Based Aid Funding in FY 20 Appropriations**

Following a series of short-term spending extensions to avoid a government shutdown, Congress finalized government spending levels for fiscal year 2020 in December. The final bill increased funding to campus-based student aid programs for the first time in several years, boosting funding for the Federal Supplemental Educational Opportunity Grant program by \$25 million (to \$865 million) and allocating \$1.2 billion for the Federal Work-Study program, a \$50 million increase from FY 2019. The measure also included a \$150 increase to the maximum Pell Grant award, addressed ongoing issues with federal loan servicers and foreign gift reporting requirements, and included language allowing students to use up to \$10,000 from their 529 education savings accounts to pay down student debt. The FY 2020 spending package also included a legislative fix to the “kiddie tax” mistake made in drafting the Tax Cuts and Jobs Act of 2017, an error that inadvertently harmed many low- and middle-income students by taxing scholarships and grants spent on non-tuition expenses at the much higher tax rates used for trusts and estates rather than at the marginal rate of the students’ parents.

### **Congress Approves ED/IRS Data Sharing**

In December 2019, the [Fostering Undergraduate Talent by Unlocking Resources for Education \(FUTURE\) Act](#) was signed into law. The bill’s data-sharing provisions previously appeared in the [FAFSA Act](#), a bill NASFAA strongly supported. In addition to providing permanent, annual mandatory funding to Minority-Serving Institutions (MSIs), the [FUTURE Act](#) simplifies the financial aid application, verification, and student loan repayment process for millions of students and borrowers by amending both the Internal Revenue Code (IRC) and HEA to allow the Internal Revenue Service (IRS) to disclose tax return information directly to ED. This change will [streamline](#) the FAFSA-filing process by allowing individuals to have their IRS-verified income data directly imported into the form, and it eases the income verification process for student loan borrowers requesting or renewing eligibility for income-driven loan repayment plans. NASFAA has been actively involved in the implementation of the bill’s FAFSA data-sharing provisions.

### **Bipartisan Legislation to Improve Aid Offers**

In 2018, the NASFAA Board of Directors [approved](#) an official policy position that calls for standardized terms, elements, and definitions on financial aid offers, and in 2019 the association [updated](#) its Glossary of Terms for Aid Offers. NASFAA then began working closely with congressional staff on legislation that would improve student aid communications while still allowing institutions to develop aid offers that meet the needs of their unique student populations. In September 2019, Reps. Lori Trahan (D-MA) and Lloyd Smucker (R-PA) [introduced](#) the bipartisan [Financial Aid Communication and Transparency \(FACT\) Act](#) of 2019. The bill, [endorsed](#) by NASFAA, would bring some standardization to financial aid offer forms by mandating the use of standard terms and definitions. It would also require institutions to include a “quick reference box,” allowing students to quickly compare aid offers. The FACT Act was included in the CAA, House Democrats’ HEA reauthorization proposal.

NASFAA also expanded on its efforts to improve financial aid offers by convening the [Examining Software Providers’ Compliance with the NASFAA Code of Conduct Working Group](#), which the board tasked with researching and analyzing the role that student financial aid management software plays in institutions’ ability to provide accurate and clear aid offers. In May 2020, NASFAA’s board approved the group’s [report](#), which included recommendations for Congress and NASFAA, and best practices for software providers and institutions.

## **Department of Education**

### **NASFAA Participates in ED Working Group on FUTURE Act Implementation**

After passage of the [FUTURE Act](#) in December 2019, following years of advocacy, the focus shifted to implementation. Federal Student Aid (FSA) staff invited NASFAA to participate in its FUTURE Act working group dedicated to the implementation of the FUTURE Act provisions related to direct data sharing between the IRS and ED for FAFSA applicants. Many implementation challenges surround consent, special tax situations, and existing IRS laws that apply to all recipients of federal taxpayer information. We continue to work through these challenges toward the goal of the FUTURE Act: a streamlined application and verification process that also maintains program integrity.

### NASFAA Advocates on CARES Act Implementation and Regulatory/Statutory Flexibilities

Since the COVID-19 crisis began in early March, NASFAA staff has been in constant contact with ED staff, suggesting areas of possible regulatory and statutory flexibilities where authorized, and asking questions and providing feedback about ED guidance. Through June, NASFAA sent more than [100 questions](#) to ED staff and assisted members in understanding and implementing more than 13 COVID-related [Electronic Announcements, FAQs, and other ED guidance](#).

### Research and Grants

#### Research and Technical Assistance Work Related to COVID-19 Assists Members

Generous funding from the Bill & Melinda Gates Foundation allowed NASFAA to provide members and others with technical assistance and create resources related to COVID-19. This funding helped NASFAA to

- temporarily make coronavirus-related AskRegs Knowledgebase questions and webinars available to the public,
- produce original content on COVID-19 for *Today's News*,
- make our policy & federal relations staff available for media calls and presentations,
- produce special COVID-19 episodes of NASFAA's "Off The Cuff" podcast, and
- complete three COVID-19 related surveys of our members.

Each of these efforts saw tremendous response from the community, with an average attendance of nearly 6,500 per webinar, 77 articles in *Today's News*, and 84 media mentions. We followed up NASFAA's first [CARES Act Distribution](#) membership survey in May 2020 with another CARES Act poll in June 2020. The results of these two surveys allowed NASFAA's Policy and Federal Relations team to better inform members of Congress and ED on whether institutions were able to distribute their CARES Act funds and what, if anything, prevented them from doing so. The surveys saw 587 and 237 responses, respectively.

In late May, NASFAA also [surveyed members](#) on how the COVID-19 pandemic had impacted the number of professional judgment requests they received. This survey continues to inform discussions with Congress and ED on what financial aid offices may experience this fall and what assistance they may need.

### NASFAA Updates Its Administrative Burden Work

Following up its 2010 and 2015 studies, NASFAA again surveyed financial aid professionals at its member institutions to better understand how ongoing regulatory changes are affecting college financial aid offices. The [2020 NASFAA Administrative Burden Survey](#) revealed several key findings:

- Forty-three percent of respondents said their financial aid office recently faced moderate resource shortages — in staff, finances, and technology, among other commodities — that affect the level of services during peak processing periods. These shortages most frequently included a limited budget and an insufficient number of counseling and support staff members.
- Respondents most often cited inadequate institutional budgets, compliance workload, and (to a lesser extent), bureaucratic inefficiency and additional Title IV requirements as major contributors to those resource shortages.
- More than 40% of survey respondents said complying with verification comprised 20% or more of their operating budgets. About 17% reported it took more than an hour on average to verify a single application, while 38% said it took an average of less than 20 minutes.

The report made recommendations to address the causes associated with resource constraints and called on Congress and ED to take reasonable steps to reduce administrative burden. These recommendations fell into four broad categories:

- Streamline student aid application processes
- Eliminate burdensome and duplicative regulations
- Reform regulatory development processes
- Support aid community efforts to enhance financial wellness and curb student indebtedness

### NASFAA Continues to Assist Displaced Students

In response to the abrupt 2015 closure of Corinthian Colleges, NASFAA and several other organizations initiated [NextStepsEd](#), a site where students affected by college and career school closures can submit requests for help with financial aid questions and more. Now maintained by NASFAA and Lumina Foundation, this project has helped more than 5,000 students to date in navigating their options regarding closed school federal loan discharge, Universal Borrower Defense, and Federal Pell Grant eligibility restoration. Thanks to generous additional grant funding, we will be able to continue this effort through December 2020.

**2019 NASFAA National Profile**

NASFAA updates the National Student Aid Profile each year to examine the state of the Title IV programs. As in prior years, the [2019 National Student Aid Profile](#) included new data from the Office of Federal Student Aid’s FSA Data Center on repayment status, loan status, delinquency status, and the Public Service Loan Forgiveness program.

NASFAA also received grants from Lumina Foundation and the Bill & Melinda Gates Foundation in early 2019-20 to conduct work related to extending Title IV Aid to short-term programs and enhancing FAFSA efficiency. While we conducted most of the work in 2019-20, the pandemic delayed publication of the report until FY 2021, so details will appear in next year’s annual report.

# NASFAA Resources and Advocacy in the Time of COVID-19

March - June 2020



### Congress

In the final Coronavirus Aid, Relief, and Economic Security (CARES) Act bill, passed on March 27, 2020, NASFAA saw many of its congressional requests related to flexibilities and waivers and relief opportunities for student loan borrowers realized.

6

NUMBER OF REQUESTS RELATED TO FLEXIBILITIES AND WAIVERS

NUMBER OF REQUESTS RELATED TO BORROWER RELIEF

5

### The Department of Education

NASFAA has been in regular communication with the Department of Education throughout the implementation process to ask questions and seek clarification on behalf of our members.



OFF-THE-RECORD QUESTIONS SENT TO ED REGARDING GUIDANCE

### Community Work

3,255

NUMBER OF QUESTIONS ANSWERED MARCH-JUNE 2020

NASFAA's Training and Regulatory Assistance (TRA) team continued to add answered questions to NASFAA's AskRegs Knowledgebase, which consists of financial aid-related questions submitted by NASFAA members.

NASFAA has been a recognized member of the higher education community during the pandemic and has been asked by multiple organizations to create, present, or participate in webinars or learning sessions as a trusted source of knowledge.

9

COLLABORATIONS WITH COMMUNITY ORGANIZATIONS

## Articles & Interviews

Considered experts on the topic, NASFAA staff have been called on by national and local newspapers as well as higher education-specific publications to provide information on how financial aid has been affected by coronavirus, and to give opinions on ED's rollout of guidance.

77

Number of COVID-19 related articles written between March 5, 2020 and June 30, 2020

84

INTERVIEWS



NASFAA's Communications team, in conjunction with the Policy and Training & Regulatory Assistance teams, produced an extraordinary number of articles for *Today's News*, to keep members informed of all student financial aid-related news.

## Member Media

In response to the complexity surrounding CARES Act implementation, NASFAA produced biweekly webinars to help educate our members on the newest guidance.

35,543

PODCAST DOWNLOADS



6,458

AVERAGE REGISTRANTS

99.5%

FOUND USEFUL

99.8%

WOULD RECOMMEND NASFAA WEBINARS TO OTHERS

NASFAA staff also continued to produce the weekly "Off The Cuff" policy podcast, 13 of which focused almost exclusively on COVID-19-related information. Additional special episodes, such as those interviewing financial aid directors, also provided information to help institutions in crafting their own policies in response to ED's guidance.

## Resources

Blue Icon Advisors, NASFAA consulting, hosted 31 "Let's Talk" peer-to-peer conversations that allowed participants to compare and share how they used their CARES Act funds, supported students through remote services, and administered aid in the COVID-19 environment.

1,084

NUMBER OF PARTICIPANTS

As information and new guidance continued to be published about the use of CARES Act funds and the flexibilities and waivers provided by ED and Congress, NASFAA created a HEERF timeline that tracks all the changes to guidance, as well as a one-stop shop resource page with a FAQ section.



# An Unforgettable Year

*Passing the gavel of leadership to incoming National Chair Brenda Hicks in a virtual ceremony, 2019-20 National Chair Paula Luff recalled the extraordinary year she and NASFAA members had experienced and her pride in serving the association.*

As you probably know, this is not how I expected to be closing out my year as NASFAA chair. But COVID-19 has disrupted almost every aspect of our lives — shrinking our worlds to home offices, backyards, front porches and an occasional Costco run, while challenging us to find new ways to connect with each other and stay connected to the larger world. Nearly every relationship or personal interaction we may have taken for granted has changed. In some ways, this has brought us closer together — families are spending more quality time with each other, friends we rarely saw in person are now regular participants in our “shelter in place” online social lives, and Zoom happy hours are becoming part of our new normal.

So, it was no surprise to anyone when we decided to cancel the annual NASFAA National Conference. No surprise, but a great disappointment. Like many of the professional events we used to attend, the NASFAA Conference was much more than an opportunity to hone our skills, hear the latest news about higher education policy, and learn from each other. It was a time to reconnect with colleagues across the nation who understand our professional lives, who have shared our personal lives as well as our passion for helping students, and who we’ve come to count on as invaluable resources, mentors and friends. Although we aren’t able to gather in person this year, our work continues.

And, wow, has there been work to do! The NASFAA team had a full plate going into the spring of 2020, with the association providing outstanding training and professional development opportunities for our members and the financial aid community — including the 50th annual Leadership & Legislative Conference & Expo in Washington, D.C., as well as the first Executive Roundtable event.

Likewise, several task forces began, continued, or completed work on various topics, such as the Enhanced Loan Counseling Task Force, the Succession Planning Task Force, and the Administrative Capability Task Force.

A second Diversity Leadership Program class was successfully selected and connected with each other and with mentors who are helping them along their paths to becoming leaders in our profession. And the Association Governance Committee spent considerable time updating our Strategic Long-Range Plan.

All of these efforts, along with the official launches of the Certified Financial Aid Administrator Program® and the Blue Icon Advisors, meant a full winter for the NASFAA team.

Then came COVID-19.

While the achievements of this organization consistently exceed expectations, I believe NASFAA’s greatest accomplishment this year, and the greatest accomplishment of our NASFAA president and staff, has been the immediate and comprehensive response to the pandemic. From the very beginning, NASFAA led the way for our members and institutions to navigate the tremendous and unforeseen challenges brought on by the coronavirus.

So as I prepare to pass the gavel to Brenda Hicks, our incoming national chair, I do so with great pride for having been a part of this incredible association and with sincere gratitude to Justin, the NASFAA staff, my commission directors and committee chairs, the NASFAA board, and you, the NASFAA membership, for giving me the opportunity to serve a profession I love at the highest level. No, this was not the year I planned, but it’s certainly one I will never forget.

Thank you and stay well.

# Communications

Serving as a forum on student financial aid issues continues to be a top priority for NASFAA, and immediate, accurate communication is never more critical than during times of crisis. NASFAA works daily to increase knowledge of timely issues, foster discussion, and promote the exchange of ideas using NASFAA.org, *Today's News*, NASFAA's "Off The Cuff" podcast, and its five social media channels.

Our proactive and reactive public relations efforts help us keep our strong presence in Washington, D.C., and a seat at the table for important discussions pertaining to funding, access, and success. Through these tactics, NASFAA has become a trusted source of reliable information, not just for financial aid professionals, but also for lawmakers, think tanks, researchers, state and national associations, and others in the higher education community as well.

## Today's News

Consistently rated by members as the most valuable NASFAA benefit, *Today's News* keeps financial aid professionals across the country apprised of the latest news, events, and trends in higher education. With its exclusive notices for online courses, webinars, and advocacy resources and efforts, not to mention volunteer, training, and career opportunities, *Today's News* keeps subscribers always in the know when the newsletter hits their inbox each business day.

Last year, subscriptions grew to 23,896 daily recipients — an increase of 572 subscribers since 2018-19. The *Today's News* average open rate of 34% for 2019-20 continues to exceed the average open rate for nonprofit emails (25.2% per a 2019 CampaignMonitor [email benchmark report](#)), highlighting its significant value to financial aid professionals and other higher education thought leaders.

A key feature of *Today's News* is original, NASFAA-developed content targeted to the specific interests of our members. This year, COVID-19 threw the financial aid community — along with the rest of the nation — into uncharted waters as the global pandemic suddenly forced colleges and universities to shut down or shift to online learning platforms in the spring and caused continued disruption as the fall semester approached. NASFAA-authored news articles focusing on rapidly changing guidance from the federal government, and the pandemic's impact on institutions in general, dominated our 10 most-read original articles for 2019-20:

1. [Congress Strikes Deal for \\$2 Trillion COVID-19 Relief Package](#)
2. [ED Releases Further Guidance on Use of CARES Act Emergency Funding for Students, Institutions](#)
3. [ED Provides Details on Institutional Allocation for \\$6 Billion in Emergency Funds for Students](#)
4. [American Council on Education Simulates Distribution of CARES Act Emergency Funds](#)
5. [ED Releases Updated COVID-19 Guidance Addressing Verification, Need Analysis, Distance Education](#)
6. [Working Students and New Graduates Eligible for CARES Act Unemployment Benefits](#)
7. [In Reversal, ED Will Not Enforce Title IV Eligibility for CARES Act Student Grants, Still Excluding DACA Students](#)
8. [ED Releases Interim Reporting Guidelines for Student Portion of the CARES Act Emergency Relief Fund](#)
9. [ED Outlines Requirements for CARES Act Emergency Relief Institutional Funds](#)
10. [ED to Publish Interim Final Rule Barring Undocumented, International, and Non-Title IV Eligible Students From CARES Act Emergency Grants](#)

To learn more about NASFAA's expanded efforts in response to the pandemic, see page 13.

## Member-Reflecting Content

Despite the many challenges faced on campuses this year, financial aid professionals across the country continued their tireless efforts to serve both their students and the profession. This year, NASFAA spotlighted — through *Today's News* articles and special episodes of our "Off The Cuff" podcast — the unique ways our members have been making an impact. These are just a few of the most-read articles from the past year reflecting the hard work performed by you, our members:

- [American University's Food Pantry Battles Student Food Insecurity Daily, Year-Round](#)
- [Rice University Invests in Students in the Middle](#)
- [St. Petersburg College Aims to Prove That Financial Aid Works](#)
- [Tallahassee Community College Finds Low-Cost Way to Train Financial Aid Administrators](#)
- [Colorado Mountain College's Income Share Agreement Program Offers Interest-Free Option for DACA Students](#)

## Proactive Media Engagement

To maintain its strong connections with the media throughout the year, NASFAA staff aim to initiate an average of three proactive interactions per month. Two media outreach tactics we frequently employ include writing and broadly distributing press releases about NASFAA's research, grant work, and advocacy efforts, and sending targeted "pitch" emails to a curated list of reporters with whom NASFAA has working relationships.

In 2019-20, NASFAA distributed a total of 18 [press releases](#) on a number of topics. For example, our press releases:

- Announced the release of NASFAA research and surveys
- Outlined NASFAA's Higher Education Act Reauthorization priorities
- Showcased the ongoing advocacy efforts of NASFAA and its members

- Issued statements from NASFAA leadership on critical and trending issues in student aid, such as fraud, cohort default rates, the FACT Act, the College Affordability Act, the Financial Aid Simplification Act, COVID-19 guidance, the Deferred Action for Childhood Arrivals (DACA) program, and more.

NASFAA also values presenting the unabridged views of the financial aid community before a broader audience through timely op-ed pieces targeted to the trade press, national media outlets, and other associations' blogs. This past year saw five op-eds, authored by NASFAA staff and published or reprinted in prominent publications:

- "[Gainful Employment Rule Provides Lesson on Developing Policies that Stick](#)," in *The Hill* on July 4, 2019
- "[Student Loan Underwriting Failures Undermine College Access](#)," published by NASFAA and reprinted in *Medium* July 29, 2019
- "[Emergency Aid from the Financial Aid Administrator's Perspective](#)," in Student Advancing Retention in College (blog), November 22, 2019
- "[How the FUTURE Act Improves the Federal Financial Aid System](#)," coauthored by Michele Streeter from the Institute for College Access and Success and Raymond AlQaisi from the National College Attainment Network. Published by NASFAA on December 19, 2019, as well as by *Career Education Review* and the Institute for College Access and Success
- "[Emergency Grants: Congress Must Step In](#)," in *Inside Higher Ed* on May 12, 2020

## Reactive Media Engagement

The back-and-forth guidance the Department of Education (ED) issued in early 2020 had many NASFAA members struggling to make heads or tails of how to best serve students in the wake of the pandemic while remaining in compliance. But members weren't the only ones seeking answers. Media requests and resulting articles spiked in response to shifting ED guidance, the pandemic's impact on higher education, and a survey NASFAA conducted on the distribution of Coronavirus Aid, Relief, and Economic Security (CARES) Act funds. The months of March through June 2020 saw a 60% increase on average of articles citing NASFAA in national, local, and trade publications.

### “Off The Cuff” Podcast

Heading into its fifth year in 2020, NASFAA’s policy-focused podcast, “[Off The Cuff](#),” continued to bring the financial aid community a nuanced, insider’s look into the world of federal higher education policy.

*“I cannot express how appreciative I am to your podcast,” NASFAA member Shannon Barrera wrote to the podcast team in January 2020. “It allows me in a very approachable way to continually learn what is happening in my industry.”*

This year, the team produced 44 episodes on a wide range of topics including foreign gift reporting, the DACA program, continued developments in borrower defense student debt relief, and the 2020 presidential election.

Responding to the challenges colleges faced as the global pandemic sent students home for online instruction and institutions scrambled to maintain continuity, the podcast team looked for ways to provide up-to-date news and information from ED and members of Congress. They also invited members as guests to share their experiences in real time.

“I just want to thank you all for all you have done for the students and our profession, especially over the past month,” NASFAA member Bob Walker wrote to NASFAA in March 2020. “NASFAA now has the respect of ED and some of our congressional leaders ... and this is due in a large part to you all.”

NASFAA member Daniel Barkowitz added that “while sometimes it feels like we at schools are alone on this journey, you make it clear you are traveling with us.”

Barkowitz continued, “I deeply appreciate your commitment to the profession and to keeping us updated, informed and (oh yes) entertained!”

These were the top five Off The Cuff” episodes downloaded in 2019-20:

1. [Episode 144: A Deep Dive Into ED’s Guidance for Using Emergency Grant Funding](#)
2. [Episode 143: How Are Institutions Using Emergency Stabilization Funds?](#)
3. [Episode 145: ED Pulls an About-Face in Updated Guidance on CARES Act Emergency Funds](#)
4. [Episode 146: More Confusion Amid CARES Act Emergency Funds Guidance](#)
5. [Episode 147: Schools Make Moves With Emergency Grants, and COVID’s Impact on Enrollment](#)

### Forums for Thought and Discussion

This year, NASFAA presented several opportunities for members to write about and discuss current issues in student aid. In 2019-20, [Student Aid Perspectives](#) invited five expert authors to discuss trending issues in higher education. Nine member-authored [NASFAA Book Reviews](#) presented unique financial aid viewpoints on recent books in various sectors of the postsecondary arena. And the NASFAA Readers Club gave members the opportunity to analyze and discuss newly released books relevant to the field in online club meetings.

### NASFAA.org and Technology Initiatives

Over the years, NASFAA has established itself as a voice of authority in the financial aid realm, and now hundreds of thousands of members and visitors from the higher education community use NASFAA.org as their portal to a wealth of resources and services relating to student aid. The following pages on the NASFAA website received the most visits in 2019-20.

#### Five Most-Visited Pages on NASFAA.org from July 1, 2019 to June 30, 2020

Webpage	Pageviews
NASFAA.org Home	404,093
Coronavirus (COVID-19) Web Center	204,733
COVID-19 HEERF Funds Reference Page	197,134
AskRegs Landing Page	167,045
Today’s News Landing Page	121,050

NASFAA’s technology efforts in 2019-20 continued to support the changing priorities of the association. This included a complete overhaul of the dues renewal process, which now offers additional messaging and tools for both members and staff to make the dues process as efficient as possible. We realized efficiencies in other purchase and member benefit areas, including webinars, self-study guides, NASFAA U Courses, and digital products. We also made enhancements to support the transition to the 2020 Summer Training Series and credit balance transfers.

# Blue Icon Advisors

Blue Icon Advisors, NASFAA’s financial aid consulting service for colleges, universities, and career schools, celebrated its first anniversary in June after providing high-quality consulting, coaching, training, and interim staffing services to 58 postsecondary schools. If you are a [past or current client](#), thank you for helping to make our first year a great success!

Blue Icon may be young, but we are strong. During this first year, we successfully grew our team of [independent consultants](#) to include outstanding financial aid and enrollment management leaders representing all school sectors. Combined, our consultants have more than 600 years of financial aid knowledge and experience.

The schools we have worked with — including group coaching and executive coaching participants — have had great things to say about our work. Take a look at our [partial client list](#), [testimonials](#), and [case studies](#) to learn more about our impact this year.

Throughout the ongoing pandemic, Blue Icon has worked hard to develop new services to meet the community’s ever-changing needs. As institutions across the country sent aid administrators home to work and associations cancelled in-person conferences, Blue Icon developed a forum for financial aid and enrollment management professionals to network and exchange ideas in a safe, remote environment, and “Let’s Talk” was born. The first Let’s Talk sessions occurred on March 19, 2020. Since then, Let’s Talk has hosted over 800 individuals from more than 700 schools. Let’s Talk continued through the summer, supporting NASFAA’s 2020 Summer Training Series, and will continue monthly throughout 2020-21. [Feedback](#) on Let’s Talk has been outstanding.

New offerings planned for 2020-21 include Aspiring Director Group Coaching, Program Review Advocate services, the Student Satisfaction Data Center, assistance with financial literacy programs, and help with launching or leveraging scholarships. If you have ideas for new services, [please let us know](#).



For-profit	18%
Graduate/professional	11%
Community colleges	28%
Public 4-year	18%
Nonprofit	25%



Consulting/Coaching	54.3%
Policies & Procedures	20.0%
Training	5.7%
Staffing	14.3%
Group Coaching	5.7%

# Standards of Excellence Peer Review Program

For over 20 years, NASFAA’s Standards of Excellence (SOE) Review Program has helped more than 250 schools leverage their strengths, reduce compliance risks, and maximize performance. SOE reviews deliver a comprehensive evaluation of financial aid operations and help ensure compliance at every level.

In September 2019, the Tennessee Board of Regents (TBR) [contracted with the SOE review program](#) to complete 13 full SOE reviews over the course of four years.

*“We wanted a way to evaluate all our community colleges on an individual basis but also be able to identify trends across all schools,” said Dr. Heidi Leming, TBR vice chancellor for student success. “Using the SOE review program was a perfect fit for us to achieve that goal.”*

Full SOE reviews typically occur on campus, so when COVID-19 disrupted operations for schools, the SOE team postponed its scheduled reviews. As time passed and “normal” seemed to move further and further away, we turned our attention to performing remote reviews. We have long offered a Consumer Information Assessment as part of the full SOE review or as a completely remote, stand-alone evaluation. This experience helped us prepare to successfully test our first fully remote, comprehensive SOE review in July 2020. Both of these remote options — the full review and the stand-alone Consumer Information Assessment — offer the benefit of colleague experience and collaboration from our team of currently practicing financial aid administrators while we continue to keep our members safe.

Due to COVID-19, SOE completed fewer reviews than normal in 2019-20, with a total of nine full reviews and six Consumer Information Assessments. However, we anticipate performing several postponed 2019-20 reviews in the 2020-21 year.

## More Than 20 Years of Dedicated Service

In June 2020, Pam Fowler, a founding member of the SOE review program and its longest-tenured member, [retired from SOE](#). “We came up with this program where we would do reviews to help directors better manage their offices and better manage the financial aid process,” she said.

Fowler formed part of the inaugural team that built the program from the ground up. She created the worksheets and wrote the framework for what would become the SOE program that still serves schools today. She served as NASFAA National Chair in 2011-12 and received the [Lifetime Achievement Award](#) in 2019. Above all, though, she said she found conducting SOE reviews one of the most rewarding aspects of her work.

Visit <https://www.nasfaa.org/SOE> for more information about the program and how to request a review.



Principal Consultant Tony Erwin stands ready to help schools boost compliance with Blue Icon and SOE.



# Professional Development and Institutional Compliance

## Training & Regulatory Assistance

*"I can be changed by what happens to me.  
But I refuse to be reduced by it."*

(Maya Angelou)

This Maya Angelou quote describes the spirit in which the Training and Regulatory Assistance (TRA) approached its work this past year. The COVID-19 pandemic created a critical situation for aid administrators along with significant questions about how to implement guidance from the Department of Education.

NASFAA's TRA team worked tirelessly to ensure the AskRegs Knowledgebase reflected up-to-the-minute guidance and delivered members the same timely responses they've come to expect year after year. In addition to guidance on the pandemic, we developed, deployed, and maintained our webinar series, online courses, self-study guides, and myriad other online self-help tools like the Compliance Engine and the Student Aid Index, all designed to support financial aid professionals. Here are a few highlights and accomplishments from the 2019-20 year:

- NASFAA members accessed the [AskRegs Knowledgebase](#) more than 2 million times during the past year: 2,057,336 times, to be exact.
- Members asked 6,497 questions of AskRegs staff in the last year (over 2,000 more than our typical average) with most questions answered within two business days.
- The [NASFAA Webinar Series](#) earned an average participant satisfaction score of 99%.
- NASFAA continued to add popular "pop-up" webinars on emerging hot topics in student financial aid.
- The [Compliance Engine](#) hosted 1,650 institutional policies and procedures manuals via the Policies and Procedures (P&P) Builder Tool.
- Direct Loans continued its reign as the most utilized checklist in the Compliance Engine's [Self-Evaluation Checklist](#). Verification succumbed to professional judgment as the most downloaded self-study guide this year.
- Verification and return of Title IV funds were the most popular topics purchased by our states and regions via the [Authorized Events](#) opportunity this year, in comparison to last year when professional judgment and needs analysis led the pack.
- Although both 2018-19 and 2019-20 found student eligibility, verification, and cost of attendance among the most accessed topics on the [Student Aid Index](#), this year program participation and program eligibility beat out Direct Loans and satisfactory academic progress in reaching the top five.
- When the board made the difficult decision to cancel the June/July National Conference due to the pandemic, staff rapidly developed the 2020 Summer Training Series featuring NASFAA staff, members, and guest presenters. The eight webinars saw an average of 1,259 registrants, and between 98% and 100% of participants reported they would recommend the webinar to their colleagues.

## Certification and Credentials

### Certified Financial Aid Administrator® Program

The 2020 fiscal year marked the first operational year of NASFAA’s new [Certified Financial Aid Administrator® Program](#). This certification formally recognizes financial aid administrators for their role as stewards of taxpayer dollars and institutional funds, their contributions to the success of their institutions and their students, and their commitment to the highest standards of ethical behavior. Utilized in conjunction with subject-specific [NASFAA Professional Credentials](#), the Certified Financial Aid Administrator® Program serves to further the knowledge and capabilities of aid administrators at a national level.

Launched at the annual National Conference in June 2019, this program garnered significant attention among members, resulting in 730 applications from qualified practitioners at 512 schools across the country. By the end of this program’s inaugural year, 173 financial aid administrators had earned their certification. NASFAA in 2020 federally registered “FAAC®” as the official designation for financial aid administrators who are certified through the program.

### Credentialing

[NASFAA’s Professional Credentials](#) continue growing in popularity. By the end of this fiscal year, NASFAA reached a new milestone: Over 20,000 professionals had joined the [honor roll](#) of members who have been awarded credentials since the program began in 2013. More than 6,500 individuals now hold at least one professional credential, with more than 110 [top credential earners](#) having earned all available Professional Credentials.

This year saw an important advancement in our credential program. NASFAA now offers the opportunity to renew each credential by successfully passing the current version of the credential test for that subject. This ensures knowledge in the topic remains current and relevant.

Combined with experience in the field, NASFAA credentials also offer excellent preparation for progressing toward getting certified.

NASFAA salutes the financial aid professionals who took the next step in their professional career to achieve their certification. Why is certification important for financial aid leaders? A few of our 2019-20 participants offered their thoughts:

*“I thought this was a great way to prove something to myself and to have a ‘badge of honor’ for our profession. . . . I take pride in the CFAA designation, just as I take pride in my undergraduate and graduate degrees. The certification shows I have a firm foundation in the financial aid profession, and that I take training and professional development seriously.”*

*Katie Conrad, senior associate director of financial aid at Florida International University, Florida*

*“I wanted to pursue the CFAA designation to set myself apart from other financial aid employees that share my experience and background.”*

*Loretta Jones, quality control specialist at ECPI University, Virginia*

*“I owed it to NASFAA and our profession to try. I realized my financial aid knowledge was a product of dedicated colleagues, co-workers, and Department of Education trainers sharing their experience and wisdom with me over the years.”*

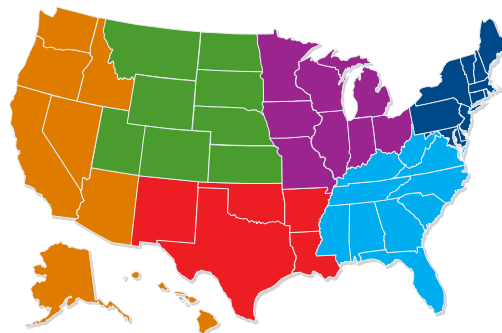
*Marvin Smith, Executive Director of Financial Aid & Scholarships at UCLA, California*

*“I’ve been in this profession for 28 years. I’ve trained many people on financial aid regulations. I work in a small shop where I materially participate in the day-to-day operations of the office. I wanted to see if all that experience was enough to pass this exam.”*

*Brenda Hicks, Director of Financial Aid at Southwestern College, Kansas*

### 2019-20 Certified Financial Aid Administrators®, by Region

MASFAA	42
SASFAA	38
EASFAA	31
WASFAA	30
SWASFAA	18
RMASFAA	14



# Six Questions with NASFAA's Diversity Officer Scott Skaro

Every two years, NASFAA's Board of Directors appoints a volunteer diversity officer to guide the organization's diversity and inclusion efforts. The diversity officer monitors the board's strategic plan for diversity-building opportunities, provides key input to the board on issues related to diversity and inclusivity, and reports on these efforts to the membership. In this reprint of a recent *Today's News* article, NASFAA Staff Reporter Hugh T. Ferguson interviewed the association's new diversity officer, Scott Skaro.



Diversity Officer Scott Skaro

*"We have to be honest with ourselves about our nation's history. When seeking out opportunities, not everybody's starting at the same starting line. We need to ensure that people who have been marginalized have access to education and can use that education to get jobs that help them succeed and provide for themselves and their families."*

As the population of students entering higher education continues to diversify, more efforts are being taken to ensure college campuses provide a culture of inclusion and address the unique needs of underserved students.

NASFAA's [Diversity Leadership Program \(DLP\)](#) seeks to bring this conversation into the realm of higher education leadership. Unveiled in 2018, the program provides individuals from identified underrepresented groups in the association community with support, access, and opportunities for leadership.

To get a better idea of how issues involving diversity manifest in the world of higher education and financial aid, *Today's News* spoke with NASFAA's recently appointed Diversity Officer Scott Skaro, financial aid director at United Tribes Technical College, about his experiences and what he believes are the biggest struggles facing aid administrators from diverse backgrounds today.

## **Today's News: What are your main goals as NASFAA's Diversity Officer?**

**Skaro:** The pandemic has amplified educational inequities that have always existed. NASFAA — its leadership and members — has an opportunity right now. We're in some historic times where people are really looking at diversity and how people have been historically marginalized. I think when it really comes down to it, all of us really need to listen to the students and communities we serve. A lot of people will talk and talk and talk, but not everybody listens. There are a lot of unique perspectives out there in this country. I think this is a really good opportunity for us to lead some change that will make it possible for more people to succeed in higher education.

As a Native American, recent events such as the removal of Columbus statues and removing the Washington Redskins name — that's stuff that I've thought about for years. It's exciting to see the winds of change right now. I think we're entering a time when people are more motivated right now to restructure and reform, and I think that's exciting.

#### **Today's News: Why were you interested in serving as NASFAA's Diversity Officer?**

**Skaro:** I've been serving on the committee for the Diversity Leadership Program since 2018, since the inception. I've really loved reading the people's essays and I've been really excited about the program. I think it's a very innovative way of getting minorities into leadership roles and other types of tasks for similar positions within NASFAA.

#### **Today's News: Why is diversity important to higher education and the financial aid profession?**

**Skaro:** I think what it comes down to is that everybody's just looking for an opportunity. We have to be honest with ourselves about our nation's history. When seeking out opportunities, not everybody's starting at the same starting line. We need to ensure that people who have been marginalized have access to education and can use that education to get jobs that help them succeed and provide for themselves and their families. If students see a financial aid officer who looks like them, who has overcome similar adversity, has completed college, and is now gainfully employed, it gives the students hope for their own futures. In addition, a financial officer can empathize with the students because she or he understands their culture and background.

#### **Today's News: What unique struggles do underrepresented workers in our profession face?**

**Skaro:** I worked for a Fortune 500 company, and they were one of the only companies that had an African American CEO. As of right now, there are only four African American CEOs and there are only 37 female CEOs.

Just based on those numbers alone, I think this just shows that there still needs to be work done. For me, the most important lesson I ever learned working in a corporate environment is that the company told us they want their company to look like the customers they serve, with the same diversity as the customers they serve. I think that's a lesson not just for NASFAA, but for a lot of organizations in the country to strive for.

#### **Today's News: How can NASFAA's Diversity Leadership Program help frame a future of inclusion in higher education?**

**Skaro:** Seeing people that are like you in positions of power, in positions of influence, I think it can be an inspiration. Just seeing that makes you want to work toward something like that. For me, I started off working on the [Assessing Tuition- and Debt-Free Higher Education Task Force](#) with NASFAA and I just found myself getting more and more involved with the organization, especially with the Diversity Leadership Program. I could see more of our alumni moving up and advancing to leadership roles. New members can identify with those people, and it can be an inspiration.

#### **Today's News: What do you think institutions of higher education need to do in the wake of COVID-19 to foster a culture of inclusion?**

**Skaro:** I think what we're finding right now is that a lot of minority populations are still in poverty. With the COVID-19 situation, we're moving to more digital platforms to deliver education and we're finding a lot of minority populations may not have the technology, tools, internet access, or work space to not only be successful, but even participate in those platforms.

The spring is when we found a lot of elementary education being forced online, and I think there's a lot of data and information that's coming out of that showing that there's a big group of our population that we may be losing, just because they don't have access. That's something we need to be on top of right away, and try and help those groups out. The inequities brought by COVID-19 will affect students' academic proficiency for years to come. Colleges and universities need to plan not only for fall 2020, but for many years in the future. The first hurdle is to ensure everyone has access to education, from preschool through college, and financial aid officers play a large role in making sure students have the funding they need. I'm honored to be NASFAA's Diversity Officer and be part of the solution.

Diversity Officer Scott Skaro can be reached via email at [sskaro@uttc.edu](mailto:sskaro@uttc.edu).



# 2020 Leadership & Legislative Conference & Expo

Financial aid experts and aspiring student aid leaders from all over the country united in Washington, D.C., once again this year, from February 4 - 6, 2020, to participate in one of the field's most valuable and unique training experiences: NASFAA's Leadership & Legislative Conference & Expo.

Each participant chose to concentrate on one of four distinct leadership pathways:

- Advanced Topics in Financial Aid Leadership
- Association Leadership
- Compliance Management
- Strategic Enrollment Management

Participants also seized the opportunity to connect with peers during lively networking events and advocate for student aid during in-person Capitol Hill visits with legislative staff.

This year's event yielded its highest attendance to date, with 374 participants across the four pathways. The conference also had its highest exhibitor participation, with 22 individuals from among our associate membership.

Many members value this annual event for the unique training, legislative advocacy, and networking opportunities it provides. Six-time Leadership Conference attendee Christopher Rodriguez, director of financial aid at Middlesex County College, sums it up this way:

"I think this is the best conference there is. It's very focused, you really get to network, and you're not having to choose between several concurrent sessions. You have a specific path that you're going to be attending and becoming an expert in."

See <https://www.nasfaa.org/leadership> for more information on the upcoming Leadership Conference..



NASFAA staff open the 2020 event.



NASFAA's booth highlights valuable services and training.



Conference break with NASFAA exhibitor partners.



NASFAA Diversity Officer Craig Slaughter shares insights on diversity, equity, and inclusion.

# 2020 NASFAA Awards

In June 2020, NASFAA announced its annual awards to members of the financial aid profession and higher education community who exemplify service to students and excellence in the field. Details about the impressive achievements of this year's awardees' appear in a special [press release](#) honoring the recipients.

NASFAA this year recognized two recipients with its 2020 [Lifetime Achievement Award](#), the highest honor the association can bestow on a member. NASFAA honored:

- **Ron Day**, director of student financial aid, Kennesaw State University
- **David Gelin**, director of financial aid, Davidson College

NASFAA bestows the [Allan W. Purdy Distinguished Service Award](#), one of its most prestigious awards, for either significant contributions in furthering NASFAA's goals over a sustained period or for a single contribution of momentous importance. In 2020, NASFAA honored:

- **David Sheridan**, director of financial aid, Columbia University – School of International and Public Affairs
- **Paula Luff**, vice president for enrollment planning and management, Ball State University

The [Meritorious Achievement Award](#) is presented to an individual who has made either an important single contribution to NASFAA or the profession, or multiple significant contributions. NASFAA bestowed the 2020 award on:

- **Craig Munier**, assistant director of policy, liaison and implementation (retired), U.S. Department of Education

Each year, NASFAA presents the [Robert P. Huff Golden Quill Award](#) to an individual or organization chosen for their contributions to the literature on student financial aid. Published works must exemplify the highest quality of research methodology, analysis, or topical writing on the subject of student financial aid or its administration. In 2020, NASFAA presented the award to:

- **Center for American Progress (CAP)**

The association also presented six [Regional Leadership Awards](#) to recipients who have exhibited high integrity and character, shown creative leadership, and inspired and encouraged others to actively participate in professional development. NASFAA awarded the Regional Leadership Award to the following individuals:

- **EASFAA – Neville Brown**, associate director of financial services, Eastern Connecticut State University
- **MASFAA – Aaron Steffens**, associate director of financial aid, Luther College
- **RNASFAA – Vicki Kucera**, area director of student financial services, Central Community College
- **SASFAA – Keith Reeves**, systems business analyst, Clemson University
- **SWASFAA – Shannon Crossland**, senior director, compliance and administration, Texas Tech University
- **WASFAA – Kim Wells**, federal student aid training officer, U.S. Department of Education

The [Gold Star Award](#) recognizes innovative ideas in the financial aid arena at any level, targeted toward any constituency. Two groups presented award-winning ideas for the 2020 year:

- **Gold Star Award: Florida Association of Student Financial Aid Administrators (FASFAA)** for its Clock-Hour Workshop.
- **Honorable Mention: University of South Florida** for #bull2bullreduceyourdebtchallenge: A Peer-Based Financial Badging Program.



# Membership

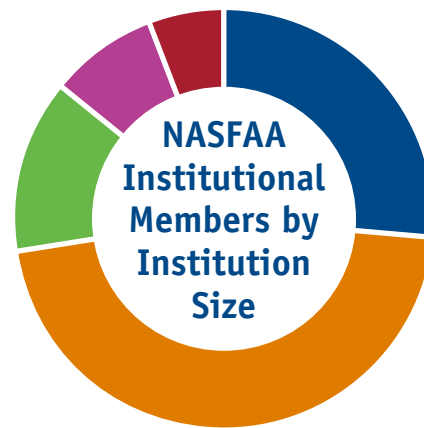
This year, NASFAA enjoyed its highest member retention rate since 2008-09 (97.6%) and continues to remain well above association-sector averages. NASFAA now has 2,733 institutional members, the highest number since 2015-16. Our members continue to work with the large majority of the nation's postsecondary students, serving nine out of 10 undergraduates in the country as well as graduate and professional students.

NASFAA's Board of Directors held dues steady in 2019-20 to encourage new memberships and renewals. NASFAA continues to exceed its membership projections due to higher-than-projected retention and recruitment rates and membership dues package upgrades.

Toward the end of the fiscal year, NASFAA provided a series of free-to-the-public COVID-19 related webinars. These immensely successful and well-attended online events offered a critical public service and gave NASFAA additional exposure, resulting in 38 new and reinstated members at the end of the fiscal year.



	Number of Schools	Percentage of Member Institutions
Community Colleges	798	29.2%
For-profit	232	8.5%
Graduate/Professional	116	4.2%
Nonprofit	1,053	38.5%
Public 4-year	534	19.5%
<b>Total</b>	<b>2,733</b>	<b>100.0%</b>



	Number of Schools	Percentage of Member Institutions
0-999	714	26.1%
1,000-4,999	1,268	46.4%
5,000-9,999	383	14.0%
10,000-19,999	219	8.0%
20,000 and above	149	5.5%
<b>Total</b>	<b>2,733</b>	<b>100.0%</b>

# Congratulations to the 2019/20 Diversity Leadership Program Class!

From a large field of applicants, NASFAA selected six new participants — one from each region — to participate in the 2019-20 Diversity Leadership Program (DLP) Class. DLP promotes diversity and inclusion by helping financial aid administrators from underrepresented groups (e.g., people of color, lesbian/gay/bisexual/transgender people, people with disabilities) to establish themselves as leaders in the field. DLP advances the careers of program participants; provides professional development; helps NASFAA and the regional associations cultivate a “deep bench” of talented and motivated leaders from diverse backgrounds; and provides support, access, and leadership opportunities.

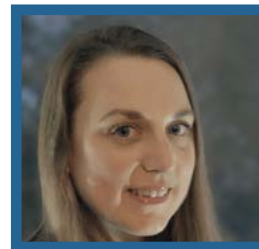
DLP participants receive complimentary registrations to both the NASFAA National Conference and Leadership & Legislative Conference & Expo; a free online NASFAA course and credential test; a seat on a NASFAA committee, working group, or task force; regular contact with an assigned mentor who previously served on NASFAA’s board; and more. See the [DLP webpage](#) to read interviews with each participant and learn more about this initiative.



Jennifer Bell, associate director for financial aid, University of Oregon (WASFAA)



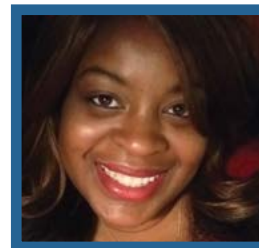
Brian Drabik, senior associate director of financial aid, Northwestern University (MASFAA)



Shannon Gallagher, director of financial aid, Rhode Island School of Design (EASFAA)



Carlos Garcia, financial aid technician, Southeast Community College (RMASFAA)



Danchees “D.” Ingram, associate director of student financial aid, University of Texas Southwestern Medical Center (SWASFAA)



Jacquelyn LeSueur, assistant director of financial aid, Mississippi University for Women (SASFAA)

# The Dallas Martin Endowment for Public Policy and Student Aid

NASFAA created the Dallas Martin Endowment (DME) for Public Policy and Student Aid, named for NASFAA President Emeritus A. Dallas Martin Jr., to promote and support the next generation of student aid advocates. Each year, NASFAA selects an upper-division undergraduate or graduate student with a special interest in financial aid policy or research for a summer internship spent fully immersed in NASFAA advocacy and/or research.

This year's intern, Muhammad Kara, who is pursuing a master's in public administration at George Washington University with a focus on education policy, had the unique experience of a virtual internship due to the pandemic. But, as you'll read in the summary article below, Muhammad did not let the "shelter-in-place" limitations slow him down. He made the most of his internship and achieved a number of his goals, including more deeply understanding the federal student aid system. Here's what Muhammad had to say about his experiences.



2020 DME Intern, Muhammad Kara

## My Five Favorite NASFAA Projects as the 2020 DME Intern

By Muhammad Kara

Interning with NASFAA has been a tremendous learning experience! I was first introduced to financial aid policy during my undergraduate career and wanted to continue learning how this important but complex system worked. Although my internship was fully remote due to COVID-19 restrictions, left this experience with a solid understanding of federal student aid programs, how they run, and who they serve. Each day, I learned something new and gained a deeper understanding of the technical side of financial aid. Below I've listed five of my favorite (and most challenging!) project areas as NASFAA's 2020 Dallas Martin Endowment Policy Intern.

### 2020 National Student Aid Profile

Working with the policy team on the [2020 National Student Aid Profile](#) was my most meaningful contribution to the team's work during this internship. I updated nearly all of the data and text in this year's profile, built presentation slides around the data, incorporated new data broken down by state, and even got to virtually present the findings to our contacts from various media outlets. I learned volumes about the individual student aid programs and feel proud of the work we accomplished.

### State Advocacy

In partnership with NASFAA's assistant director of state relations and advocacy, I helped create a [State Advocacy Toolkit](#) to assist NASFAA members in advocating for increased funding for state financial aid programs. My main contribution was developing a Student Advocacy Manual to assist college students in advocating to their state representatives on behalf of issues that impact them.

**Federal Relations and Advocacy**

My time on Capitol Hill exposed me to how Congress, committees, and the legislative process work. This experience expanded my knowledge on legislative issues impacting student aid and gave me a firsthand look at NASFAA’s advocacy strategy. In addition, I reviewed, summarized, and analyzed legislation. I now better understand the intricacies of statutory language, how budget and appropriations processes work, and what effective non-partisan advocacy looks like.

**Issue Briefs and Blog Series**

When starting this internship, one of my main goals was to improve my writing abilities. Over the course of my time at NASFAA, I had the opportunity to author two [issue briefs](#): one on recommendations to improve the Federal Pell Grant program and one on recommendations to improve student loan repayment. I also had the opportunity to write a four-article blog series highlighting different aspects of student loan debt, the repayment process, and the challenges impacting borrowers today.

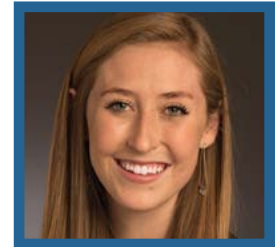
**Committee for Education Funding (CEF)**

I was lucky to be able to join CEF for their weekly calls and virtual advocacy day this summer. As a policy student, I found this exposure to such a wide swath of education leaders invaluable. It was amazing to see, in real time, the coalition’s ability to collaborate, problem-solve, and develop policy recommendations around some of the more important issues in education funding. One highlight was being able to participate in CEF’s virtual advocacy day, where I met with congressional staffers and advocated on behalf of NASFAA for increased higher education funding.

**Previous Dallas Martin Endowment Interns from 2012 to 2019**



**2019**  
Maylene Rodriguez Scott



**2018**  
McCall Hopkin



**2017**  
Brianna Hayes



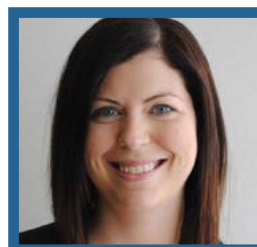
**2016**  
Janette Martinez



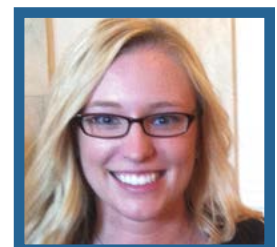
**2015**  
Angel Flores



**2014**  
Blondeen Philamond



**2013**  
Charlotte Etier



**2012**  
Margot O'Meara

**2019-20 Dallas Martin Endowment Donors**

NASFAA is deeply grateful to all DME donors from inception to today. The following groups and individuals contributed in 2019-20:

**Platinum Level: Donations from \$500 to \$999**

Justin Draeger

**Silver Level: Donations up to \$99**

- |                       |                     |
|-----------------------|---------------------|
| Nicole Brown          | Sarah Freestone     |
| Pamela Gordy          | Verna Hazen         |
| Kemia Himon           | Jodi O’Neal         |
| April Sidesinger      | Christopher Simpson |
| Lane Smith            | Lindsey Stetson     |
| Jonathan Stubblefield | Susan Sullivan      |
| Jeremy Treme          |                     |

# NASFAA Volunteers

NASFAA's volunteers form the foundation on which the association builds all of its efforts and achievements. We are grateful for the hard work and accomplishments of the members of our task forces, working groups, committees, councils and commissions who volunteer their time and talent to advancing NASFAA's mission.

The next two pages show NASFAA's 2019-20 working groups, task forces, and committees and their leaders. Please also take a moment to view our [full list of volunteers](#) and join us in thanking them for their dedication and service.

**Administrative Capability Task Force**

Mary Sommers, University of Nebraska at Kearney, chair

**Assisting Displaced Students Working Group**

NASFAA staff led

**Association Governance Committee**

Lori Vedder, University of Michigan - Flint, chair

**Awards Committee**

Lori Vedder, University of Michigan - Flint, chair

**Conference Program Task Force**

Emily Osborn, Northwestern University Chicago Campus, chair

**Ethics Commission**

S. Kay Lewis, University of Washington, chair

**Examining Software Providers' Compliance With the NASFAA Code of Conduct Working Group**

NASFAA staff led

**FAFSA Simplification Working Group**

NASFAA staff led

**Financial Affairs Committee**

Keith Williams, Michigan State University, chair

**FSA Partner Experience Council**

NASFAA staff led

**Graduate/Professional Liaison**

Christopher Pollard, The George Washington University

**Graduate/Professional Pipeline**

NASFAA staff led

**Leadership & Legislative Conference Task Force**

- **Advanced Topics in Financial Aid Leadership:** James White, Gonzaga University, chair; Sharon Oliver, North Carolina Central University, vice chair
- **Compliance Management:** Arthur Young, University of Arizona, chair; Mary Sommers University of Nebraska at Kearney, vice chair
- **Strategic Enrollment Management:** Jana Albrecht, Illinois State University, chair; Forrest Stuart, Lafayette College, vice chair

**Nominations & Elections Committee**

Lori Vedder, University of Michigan - Flint, chair

**Policy Rapid Response Network Task Force**

NASFAA staff led

**Publications Editorial Board**

Linda Conard, LMC Communications Ltd., chair

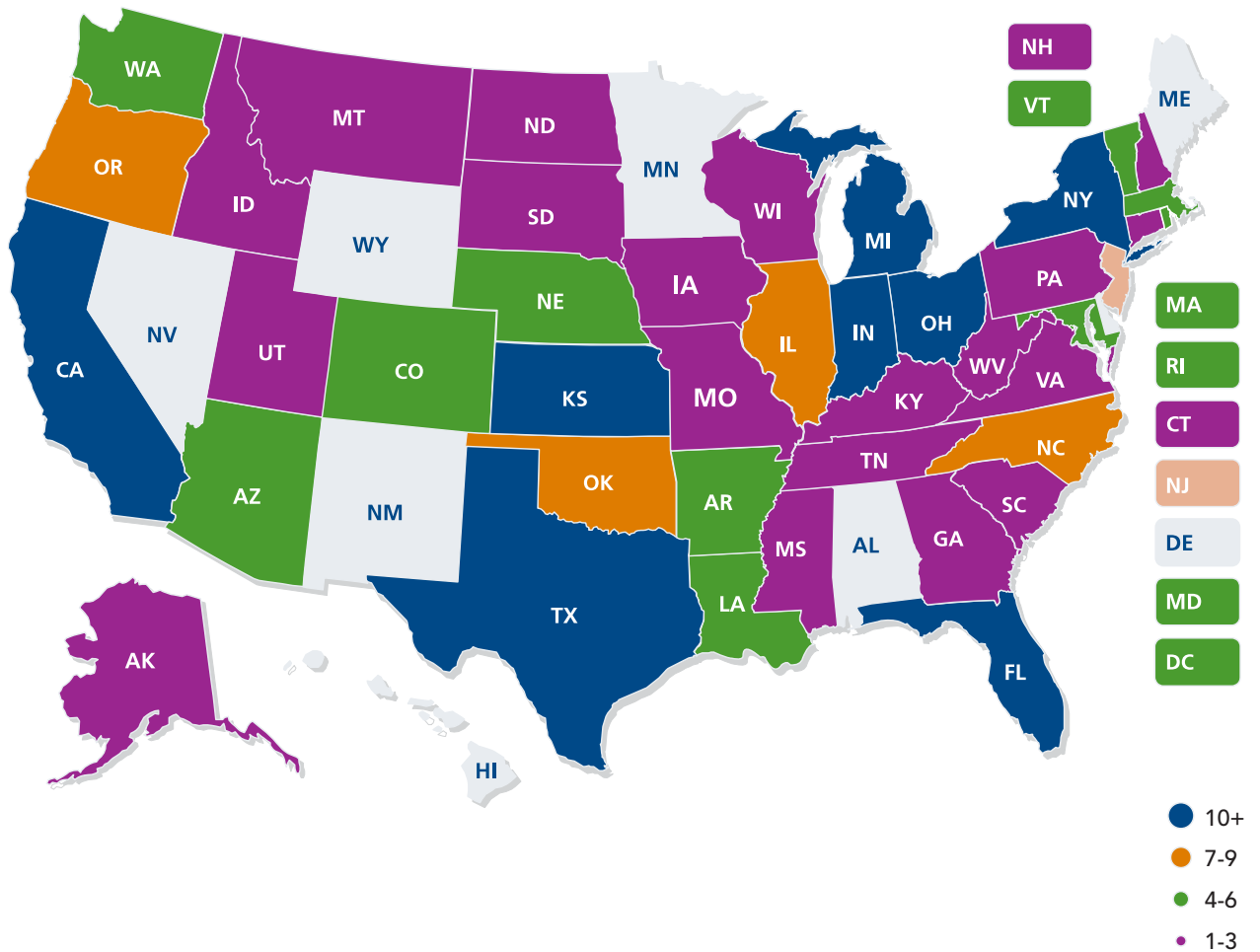
**Selection Committee: Diversity Leadership Program**

Craig Slaughter, Kenyon College, chair

**Succession Planning Thought Force**

Janet Riis, Carroll College, chair

**2019/20 Board Members & Volunteers, by State**





# Finance

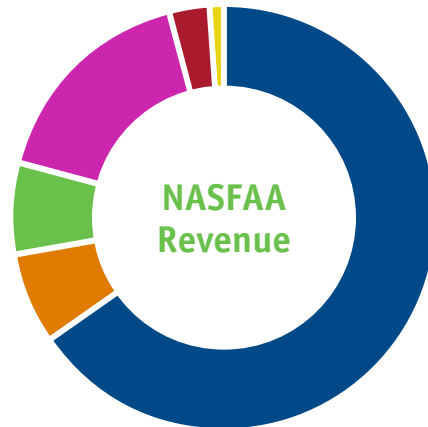
In 2019-20, NASFAA's Board of Directors and Financial Affairs Committee worked cohesively to safeguard the association's finances, position NASFAA funds strategically for investment in member services, and offer comprehensive fiscal oversight. They also found themselves in a unique position in the spring of 2020, with the rapid onset of COVID-19 and the related economic downturn, widespread school closures, and major changes to financial aid office operations.

At the Annual Business Meeting — held virtually on May 19, 2020, due to the conference cancellation and nationwide travel restrictions — Treasurer Keith Williams reported to the membership that in early spring, NASFAA's board shifted immediately to a short-term, cash-based budget and met regularly to review cash flow.

The association also utilized various tools to shore up liquidity, including a federal Paycheck Protection Program loan, transfers from reserves and Blue Icon, and stringent cost containment measures. With the cancellation of our 2020 National Conference in Las Vegas, the association opted to pivot quickly to an online summer training series to provide aid offices the critical training they've come to rely on. The training series had the added benefit of making up a portion of the revenue NASFAA forewent by cancelling the annual conference. These measures have thus far sustained the ongoing critical operations of NASFAA and forestalled any disruptions to operational continuity.

The chart on the following page tells this story and also shows that NASFAA invested the lion's share of its resources in membership services in 2019-20, with just 16% of total operating expenses attributed to overhead or administrative expenses. This outlay is significantly less than the nearly 26% average for "general and administrative expenses" cited for organizations of NASFAA's size, according to historical benchmarks published by the American Society of Association Executives.

NASFAA expended the remaining 84% of operating funds on mission-focused work, including public policy and advocacy initiatives, training efforts, communicating with members, and new program development. As one would expect given the cancellation of our premier event, both expenses and revenues in the Conferences & Meetings area were lower this year than last, dropping from 23% of total revenue in FY 19 to 7% in FY 20 and from 13% of expenses to 7%.



Membership Dues	\$5,138,206	66%
Conference & Meetings	\$538,829	7%
Grants & Research	\$514,998	7%
Training & Programs	\$1,304,406	17%
Publications	\$2,004	0%
Advertising	\$250,576	3%
Other	\$40,131	1%
<b>Total</b>	<b>\$7,789,150</b>	



Membership Support	\$1,049,037	14%
Advocacy	\$902,373	12%
Administrative & General	\$1,209,264	16%
Communications & Web Expenses	\$1,280,195	17%
Conference & Meetings	\$531,972	7%
Programs & Trainings	\$2,198,822	29%
New Program Development	\$354,978	5%
<b>Total</b>	<b>\$7,526,641</b>	

**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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