

# 2014 NASFAA National Conference



## Adapting to the New Academic Realities –

### Aid Office Challenges

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## Institutions are changing...more!

- An entrepreneurial spirit is encouraged and rewarded.
- Classroom space is limited; buildings are expensive.
- Programs target special populations.
- Technologies make learning possible around the world and around the clock. Students—and faculty—could live anywhere!

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## Computer systems are not keeping pace with institutional needs.

- Does your SIS allow set-up, processing and management of aid for credit and clock hours simultaneously?
- Does your SIS allow accurate and automated adjustment of aid on a “pay as you earn” basis when term classes start at different times?
- Does your SIS automatically calculate R2T4s?
- Does your SIS automatically track academic plans and required coursework?

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Companies come and go;  
systems cost a fortune.  
If systems are down,  
we can't function!

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The computer is a blessing...and a curse!

- Students apply for admission and register for classes on-line.
- Students change their programs of study— on-line.
- ...and change their classes over and over and over--on-line!
- Entire programs of study are on-line!

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Students are:

- Often part-time and start/stop/return more than once
- Often needing ESL courses and remedial work
- Sometimes home-schooled and entering college earlier
- Seeking high school diplomas and college degrees simultaneously
- Churning registered classes with abandon
- Completing additional associate's degrees/certificates before moving on
- Coming to CCs with bachelor's, master's and doctorate's

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## Are new approaches suddenly appearing?

- Are your students able to test out of classes?
- Do you have credit for prior learning?
- Are any of your faculty exploring competency-based education?
- Is direct assessment part of your institutional vocabulary?

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## If the institution knows, so must the aid office!

- ✓ How do you stay in the loop?
- ✓ Must one size fit all or even most?
- ✓ Is your technology helping or hurting you?
- ✓ Is yours the only office that cares if a student has a high school diploma?
- ✓ Do you have enough staff to meet the need?
- ✓ Are you providing necessary staff training?
- ✓ How do you remain compliant with all the new rules and regulations?!!

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## NASFAA Resources Can Assist

### NASFAA Webinars and Materials:

Recent example –

Nontraditional Programs –

Do You Know if You Offer Nontraditional Programs?

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## Additional NASFAA Resources:

### NASFAA Title IV Eligibility Checklist:

- ✓ Academic Program Approvals
  - \* Approval from your accrediting agency
  - \* Approval from your state
  - \* Updating E-App for ED, if no approval is required
  - \* Requesting ED's approval, if required
  - \* Requesting approval for a new location (if 50% or more of a program is taught there)

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### NASFAA Title IV Eligibility Checklist:

- ✓ Academic Program Eligibility for Title IV Aid
  - \* Does the program meet the requirements for an eligible program?
  - \* Does a short-term program (less than associate's degree) lead to gainful employment?
  - \* Is the program a direct assessment program?
  - \* Is student learning measured in clock hours?
  - \* Does the program lead to a degree?

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### NASFAA Title IV Eligibility Checklist:

- ✓ Academic Program Format
  - \* Is the program offered in a modular format? If yes, are modules combined into terms?
  - \* Do modules or terms overlap?
  - \* Will all or a portion of the program be delivered by distance education? ... or correspondence?
  - \* What are the program's definitions of full-time? Three-quarter time? Half-time? Do these definitions differ from those used in financial aid?

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## NASFAA Title IV Eligibility Checklist:

- ✓ Academic Year Requirements
  - \* Does the program meet the Title IV academic year definition requirements for number of weeks of instruction and number of credit or clock hours?
  - \* Does your school have programs with different academic year definitions?

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## NASFAA Title IV Eligibility Checklist:

- ✓ Packaging Policies
  - \* Will the new program's students differ from the institution's current student population?
  - \* If the program is an undergraduate program, which Federal Pell Grant formula applies?
  - \* If it's an undergraduate program, has the school established policies and procedures to determine and monitor maximum subsidized loan eligibility?
  - \* Do you have a process for holding aid if classes begin later in term?

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## NASFAA Title IV Eligibility Checklist:

- ✓ Student Consumer Information – What changes are needed due to a new program or location?
- ✓ Policies and Procedures – What adjustments need to be made to the institution's financial aid policies and procedures?
- ✓ Written Agreements – If the new program involves courses taken at another institution under a written agreement, does the agreement meet all Title IV requirements?

*Will your computer system even handle it, or are you now working from a spreadsheet??*

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## Are you OUTSIDE your Comfort Zone?

- \* Two-Year, Four-Year, Graduate, Professional Degree Programs
- \* Certificate Programs
- \* Career Study Certificate Programs
- \* Credential Programs
- \* Continuing Education Units

*...not to mention non-credit programs, pre-requisite courses, remedial courses below high school level!*

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## More Discomfort!

- \* Off-campus program sites
- \* On-line programs
- \* Hybrid programs
- \* Joint-degree programs
- \* Dual-degree programs
- \* 3 + 1 programs & yours is a 2-year school!
- \* Dual-enrolled students (high school & college) who are program placed

*Did anyone tell you or your staff about a new or discontinued program—or ask you if the program was eligible?!*

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## Who comes up with this stuff, and why? Don't they know anything about financial aid?!!#!

- \* Faculty Members
- \* Program Directors
- \* Curriculum Committees
- \* Non-Academic Departments like Workforce Development
- \* Deans
- \* Vice Presidents
- \* Presidents

*...and last answer in a word, "No"! That's your job!!*

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## Who Approves These Programs? Don't they know anything about financial aid??!#!

- \* Curriculum Committees
- \* New Program Committees
- \* Associate Deans
- \* Deans
- \* Provosts / Academic Vice Presidents
- \* College Boards
- \* Accrediting Agencies

...second answer in two words, "Very little!" That's your job!!

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## When does financial aid find out (best answer)?

- a) After the program is launched and marketing has begun
- b) After approval has been granted
- c) During the approval process
- d) Before the final program proposal is submitted
- e) Before the program proposal is finalized
- f) When it is too late to affect eligibility!

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## How does financial aid find out (best answer)?

- a) A student enrolled in the program calls for assistance
- b) A member of the financial aid staff sees the marketing materials
- c) A program director comes in and asks for aid information and applications
- d) By reading administrative council minutes
- e) When a student complains to the President's Office that he/she can't get aid for this program of study (it's not in SAP set-up!)
- f) A new location appears in the class schedule
- g) The Finance Office adds a scholarship line to the budget

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## What can we do?

- ✓ Form alliances with people in the process:
  - \* The person responsible for accreditor approval
  - \* The Registrar
  - \* The curriculum committee
  - \* The technology committee
- ✓ Make sure Financial Aid is present when new programs are discussed; never refuse a relevant committee invitation.
- ✓ Remind governance that gaining eligibility for new programs takes time.
- ✓ Use every opportunity to teach the community about the basics of an aid-eligible program. They know curriculum; you know financial aid!

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## A Process that Works...most of the time!

### Program Approval/Change

- 1) Request for a new program or a program change (including new location) is submitted by Perfect Forms Workflow (or a similar program).
- 2) Financial Aid is copied on the submission as a non-responder.
- 3) All information about the responsible submitter is available on the form.
- 4) Program is approved by Dean or other responsible party and sent on to the Vice Provost.

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## A Process that Works...continued

- 5) Financial Aid is copied and can now respond with comments, questions going to the Associate Vice Provost but seen by ever one.
- 6) Financial Aid questions are answered off-line, and a meeting with the program proposer may be scheduled.
- 7) Financial Aid is copied on final approval and informs the Vice Provost of any ED approvals needed.
- 8) Financial Aid, Registrar, Student Accounts meet to plan for the administration of the new program.

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...or you can find out from a student!! 😊

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