FAFSA Simplification Planning and Project Management

TOGETHER
We Make Dreams Come True

SASFAA
FL, GA, KY, MS, NC, SC, TN, LA
Daniel T. Barkowitz, AVP
Financial Assistance & Student Employment University of Miami

2023–24 SASFAA President

Daniel T. Barkowitz, FAAC®, has served 35 years in institutions of higher education. Daniel has volunteered with NASFAA, SASFAA, EASFAA, FASFAA (Florida), and MASFAA (Massachusetts), including serving as the inaugural chair of the NASFAA’s Commission of the Certified Financial Aid Administrator® (CFAA) Program, president of FASFAA, and current president of SASFAA. He served as the primary negotiator for financial aid administrators in the 2021 Federal Negotiated Rulemaking. Daniel is a recipient of FASFAA’s Distinguished Service Award, MASFAA’s Presidential Award, two-time recipient of MIT’s Dean of Undergraduate Education Infinite Mile Award, and the recipient of Florida College Access Network’s (FCAN) Top Influencer Award. Daniel earned his B.Sc. from Northeastern University, his M.Ed. from Boston University, and a certificate in Professional Fundraising from Boston University. He is a frequent conference presenter, published poet, musical theater actor, and Tarot card designer and collector. Daniel has two adult children and two adorable fur-babies.
Benefits of SASFAA Membership

• Regular webinars throughout the year
• Management institute (working title “Leading Transformative Change in Financial Aid and Enrollment: with a focus on FAFSA Simplification”), October 19-20, 2023 – Charleston, SC
• Annual conference in Orlando from February 25-28, 2024 with NASFAA Staff and Federal Trainers
• FAAC prep course as pre-conference and pre-institute option
• Regular legislative and policy updates
• Networking, volunteer opportunities, and the support of an outstanding professional organization!
• Connection to our phenomenal business partners
• All for a $35 individual membership cost!
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<tr>
<th>Date</th>
<th>Time</th>
<th>Webinar Session Title</th>
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<td>July 25, 2023</td>
<td>2:00 - 3:30 pm EST</td>
<td>FAFSA Simplification Planning and Project Management</td>
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<td>August 8, 2023</td>
<td>2:00 - 3:30 pm EST</td>
<td>It’s FISAP Time!</td>
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<td>September 19, 2023</td>
<td>2:00 - 3:30 pm EST</td>
<td>Delayed FAFSA: Communication and Outreach Strategies</td>
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<td>October 17, 2023</td>
<td>2:00 - 3:30 pm EST</td>
<td>Deep Dive into the New FAFSA</td>
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<td>November 14, 2023</td>
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<td>Cost of Attendance Budget Policy Development and Data Collection Methods for COA Components</td>
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<td>December 5, 2023</td>
<td>2:00 - 3:30 pm EST</td>
<td>SASFAA Town Hall Post-FSA Conference</td>
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<td>January 24, 2023</td>
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<td>Epic Changes to Pell Grant Awarding Coming Your Way</td>
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<td>February 13, 2024</td>
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<td>Intro to SASFAA &amp; 1st time Conference Attendees</td>
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Kathy J. Bialk, Ed. D., FAAC®, has served 39 years in progressively responsible positions at several public and private colleges and universities. Kathy has presented, provided training, published, and provided public testimony regarding higher education financing. She has served on NASFAA and various regional and state financial aid professional association committees and task forces, including leadership roles as WVASFAA President, NJASFAA President, and MASFAA Treasurer. Kathy also served as Chair of the NASFAA Certified Financial Aid Administrator FAAC® Program Commission. Kathy earned a B.S. Degree in Business Management and International Business and B.A. Degree in Polish from Alliance College, a M.A. Degree in Human Services Administration from Rider University, and a Doctorate Degree (Ed. D.) in Higher Education Leadership from Marshall University. In her spare time, Kathy enjoys traveling, practicing speaking Polish using Duolingo, gardening, cooking, and spending time with her family.
About University of Kentucky

- Public, 4-Year, Flagship and Land-Grant
  - “We remain anchored in our mission to Kentucky—to education, innovate, heal, and serve”

- 200+ academic programs, crossing over 16 degree-granting colleges, the Lewis Honors College, and the Graduate School

- 22-Varsity Sport Program, Southeastern Conference

- Total Enrollment 32,710
  - Fall 2022: 22,725 undergraduate; 8,812 graduate; other 1,163

- 29,914 Aid Recipients
  - Pell Recipients – 4,942 (21.7%)

- Total Aid Received by Students - $536.8 M
About UK Office of Student Financial Aid & Scholarships

- Staff of 30
- Financial Aid Management Software
  - ProSAM
  - Ellucian CampusLogic
    - ScholarshipUniverse
    - ClearCostAdvanced (NPC)
  - CampusCommunicator
  - StudentForms
- General Software
  - SAP (Student Lifecycle Mgmt.)
  - Tableau
  - Salesforce
  - Microsoft 365
UK FAFSA Simplification Readiness

Challenges

• Staffing
• Time for Training
• Change Management
• Stand-alone-FA Management System, ProSAM
• Competing Priorities
  • Withdrawals & R2T4
  • FWS Program Reimagined
  • Academic Calendars
  • ProSAM Modernization
• SCOTUS Affirmative Action Decision

Opportunities

• Staffing and Reporting Structure
• Creative Training Solutions
• Change Management
• Tremendous ITS/IRADS Support
  • Integration of Data
  • Build Efficient and Effective Reporting Models
• StudentForms: Custom Form Builder just Released
• Improved Efficiencies and Effectiveness Internally and Externally
• SCOTUS Affirmative Action Decision
• "Better FAFSA Better Future"
What is a Project Plan?

A blueprint of the goals, objectives, and tasks your team needs to accomplish for a specific project.

Your project plan should include information about your project schedule, scope, due dates, and deliverables for all phases of the project lifecycle.
Why have a Project Plan Instead of Just a List of File Folders?

• Organizing your projects with project plans to keep things on track—before you even start.

• A project plan houses all the necessary details of your project, such as goals, tasks, scope, deadlines, and deliverables.

• This shows those involved a clear roadmap of your project, ensures you have the resources for it, and holds everyone accountable from the start.
Why are Project Plans Important?

- Sets the Stage
- Baseline Direction
- Defines Goals & Objectives
- Instills Accountability
- Confirmation of Resources
- Forecasting Challenges
- Better Outcomes
Project Management Tools

- NASFAA Simplification Implementation Checklist
- Better FAFSA Better Future Road Map
- Microsoft Excel
- Networking!
- Free Project Management Software
  - [monday.com](https://www.monday.com): Best for Brainstorming
  - [Airtable](https://airtable.com): Best for Tracking Data
  - [ClickUp](https://clickup.com): Best for Unlimited Free Plan Members
  - [Todoist](https://todoist.com): Best for To-Do Lists
  - [Teamwork](https://www.teamwork.com): Best for Milestones
  - [Notion](https://www.getnotion.com): Best for API
  - [Confluence](https://confluence.atlassian.com): Best for Jira Users
  - [Trello](https://trello.com): Best for Kanban Boards
  - [Wrike](https://www.wrike.com): Best for Custom Work Views

FAFSA Simplification Project Management: Microsoft Teams

- Use the General Channel
  - To share an overview of what the team wants to achieve such as the FAFSA Simplification project charter or who’s in the team
  - Provide new team member onboarding and other high-level information
  - To give announcements

- Create Channels to Focus on distinct FAFSA Simplification Projects with distinct project teams
FAFSA Simplification Project Management: Microsoft TEAMS - Training Channel

- Posts
- Files
- Planner
- Calendar
FAFSA Simplification Project Management: Microsoft TEAMS - Training Channel/Posts
FAFSA Simplification Project Management: Microsoft TEAMS - Training Channel/Files
FAFSA Simplification Project Management: Microsoft TEAMS – Training Channel/Planner
FAFSA Simplification Project Management: Microsoft TEAMS – Training Channel/Calendar
Melissa Pizzo, AVP
Academic Enterprise Enrollment
Arizona State University

- Melissa Pizzo, Associate Vice President for Academic Enterprise Enrollment, Arizona State University. Melissa “Missy” Pizzo is responsible for the awarding of federal, institutional, state and private funds, currently totaling $2 billion. She has 22 years of experience in higher education at Arizona State University, holding various management and leadership positions within student affairs, academic units and enrollment management. Her additional work experience includes three years in a regional office with the American Cancer Society, serving as the Income Development Director and Program Director. She is a Certified Nonprofit Professional (CNP). She has served on the Board of Directors for the Arizona Academic Decathlon Association for the past 14 years. Pizzo earned her Ed. D. in Higher and Postsecondary Education at Arizona State University.
ASU Charter

ASU is a comprehensive public research university, measured not by whom it excludes, but by whom it includes and how they succeed; advancing research and discovery of public value; and assuming fundamental responsibility for the economic, social, cultural and overall health of the communities it serves.
ASU Information

- PeopleSoft
- Salesforce
- JIRA
- Doc model and webforms in-house
- ~200,000 ISIRs
- ~46,000 Pell Grant recipients
- ~$2 billion disbursed in all forms of aid

- Campus immersion and digital immersion
- Standard term
- Modules
- Two starts per semester (six total starts in an academic year)
Structures Implemented

- 30 minutes at weekly leadership team meeting
- Weekly operational meetings
  - Discuss trainings
  - Discuss questions in tracking document
  - Surface questions to ask internal teams
- Designated time to attend trainings

- Tracking Document
  - Excel file in Google docs
  - Coordinate thoughts and ideas
  - Engage all staff
  - Visibility and transparency
  - Inform Leadership
  - Inform resource request
Tracking Document

- Updates and Questions
- FSA Timeline
- Academic Year Cycle
- Timeline Comparison
- FAFSA Simplification Checklist
- FM & Pell Grant Changes
- Non FM & Non Pell Changes
# Updates and Questions

- Engages all staff
- Answers questions as we go
- Provides structure to inquiries

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<thead>
<tr>
<th>Subject</th>
<th>Update</th>
<th>Questions?</th>
<th>Answer</th>
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| Housing Question: On, Off, With Parent     | [DOE did clarify you can’t hold packaging to get specific information about housing. This allows schools flexibility for how they want to “assume” a student’s housing choice.](https://askRegs.state.va.us/LogOn?ReturnURL=articles/3762535557/parent-school-assume-housing-status-when-packaging-students) | - What is the comment request for FWS wages and SAI?  
- Removes proration of SAI for periods of enrollment other than 9 months?  
- Pell min-max is only determined by poverty level?  
| Negative SAI and impact on FWA             | A negative SAI is considered 0 for the need calculation.                |                                                |                                                                       |
| FWS & SAI                                  |                                                                        |                                                |                                                                       |
| SAI and proration                          |                                                                        |                                                |                                                                       |
| Pell                                       |                                                                        |                                                |                                                                       |
### FSA Timeline

- Quick reference for teams
- Inform timelines

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Timeline Comparison

- Quick reference for teams
- Visual representation of timeline
FAFSA Simplification Checklist

- Major concepts identified
  - Cost of Attendance
  - Internal/External Stakeholders
  - Communications and Outreach
  - Institutional budget impacts EFC vs SAI
  - Policies and Procedures
  - Training
- Track by timeline, status, & impact to doc model, webforms, P & P
Robert Clarke, Senior Director Financial Aid
University of Texas at Dallas

• Prior to serving in his current role, Robert “Rob” Clarke, was the Executive Director of Student Financial Aid at Eastern Oregon University, Executive Director of Student Financial Services at George Fox University, Director of Financial Aid at Concordia University, Associate Director of Financial Aid, Washington State University, and Senior Director of Financial Aid at the University of Texas at Dallas. Rob also served in other financial aid leadership roles as a Consultant for Financial Aid Services. Rob earned a B.A. and M.B.A. from Northern Arizona University.
The University of Texas at Dallas

- Approximately 31,000 students
- Peoplesoft school
- Roughly 6500 Pell recipients
- Around $350 million in aid disbursed each year
- Relatively young institution—started as a graduate research center by Texas Instruments and eventually became UT Dallas in 1969
The Issue
• Large issue with a lot of variables/changes
• Dealing with some level of uncertainty
• How best to proceed and with whom? Important to get started, even if we modify along the way
• Alerted my supervisor (the Provost), very early on

- Started with my own way to organize/document/track issues
- Enlisted the office administrative group (Associate Directors and up) and formed a FAFSA Simplification Taskforce
- Provide regular updates with the office during our weekly staff meetings
- Communication plan
Getting Myself Organized

- Created a Smartsheet just for my own use to look at specific issues and track them out
- Created a FAFSA Simplification page in Confluence for the office to use (internal use only)
- My white board gets used a lot for notes/discussions/quick lists
FAFSA Simplification Taskforce

- 7-member team—myself, 3 directors and 3 associate directors
- Meets weekly
- Meeting template with key items and dates—internally published via Confluence
- Homework and updates
- Reviewing things like:
  - Deadline changes (24–25)
  - Packaging impact of SAI
    - Pell changes and changes to matching funds
    - Number in college
    - Family business or farm
    - Impact of increased need on institutional and state funding
  - Cost of Attendance items where tuition is published
  - Awarding timeline for 24–25
  - Communication channels
  - Timing of outreach/publications
FAFSA Simplification Roadshow

- PowerPoint outlining the topic of 23-24 and 24-25 key changes for FAFSA process
- Detailed, but not too detailed
- Presented at various meetings and committees
- Intended to be for administrators

**FAFSA Simplification - Why?**

- Consolidated Appropriations Act of 2021, which included the FUTURE Act and the FAFSA Simplification Act.
- In 2021, the Department of Education announced a phased approach.
- Congress extended the deadline for implementation to 2024-25 with the Consolidated Appropriations Act of 2022.
- Intended to streamline the process.
- Reduce barriers and more accurately determine eligibility for federal aid.
FAFSA Simplification Challenges

Challenges
- State of Texas deadline
- Software readiness and timing—We use PeopleSoft.
- Developing a webpage that outlines things in enough detail to be accurate but not too much detail to lose the reader
- Which communication channels will reach the students we need to reach, and timing of those communications?
- Staffing levels. Already an issue, will this be a large problem once 24–25 FAFSA impact is felt?

• Competing for university attention—Other things taking place like NCAA D2, CRM project, Imaging project, state-level initiatives impacting the university
• Competing for office attention—state audit, awarding summer aid, orientation and other Fall 23 regular activities
FAFSA Simplification Next Steps—Opportunities

- Keep listening—what are other institutions doing?
- Keep moving on the efforts already started
- Expand engagement with different audiences
- Plan for expected and unexpected impacts—awarding models, student behavior, student facing staff work-load
- Provide regular updates for staff and for the administration
- Look for ways to use this to improve our student engagement
- Making sure we emphasize the most critical changes when promoting to students—timing and SAI changes
Nancy D. Ferguson, FAAC, Director
Student Financial Aid
University of Georgia

• Nancy Ferguson has worked in the Office of Student Financial Aid at the University of Georgia for 24 years and currently serves as Director. She holds a B.A. Degree in English and a M. Ed. Degree in Adult Education, both from UGA (Go Dawgs!). Nancy was in the first cohort of financial aid professionals who received NASFAA’s FAAC designation. When she is not busy learning about FAFSA Simplification you can find her at her happy place – Disney World.
The University of Georgia

- Public land-grant and sea-grant R1 institution
- Undergraduate, graduate, online, and professional programs
- 40,607 students (Fall 2022)
- 40 Financial Aid staff members
- Banner and CampusLogic School
Talk to Your Administration

• The earlier you can loop in key campus administrators the better
• CYA, which for this project means Cover Your Accountability
• Don’t get down in the weeds – talk about the things that matter to them
• Mention this project frequently so it stays at the forefront
• Ask them to spread the word with other campus leaders
Timeline for Administration

- K.I.S.S: Keep it Simple Superstar
- Talk in bullets
- Highlight your important points
- Make sure to include the items that will light a fire
- Set expectations and be honest about potential pitfalls and bottlenecks

2024-2025 Updated FAFSA Implementation Timeline

**2023-2024**

October 2023
- October 1st: the 2023-2024 FAFSA is released to the public
- October 1st: the 2023-2024 FAFSA is released to the public
- October 1st: the 2023-2024 FAFSA is released to the public
- October 1st: the 2023-2024 FAFSA is released to the public

November 2023
- Early in the month: OSFA is able to notify students of the need for additional information, such as verification documents
- OSFA begins completing the verification process for students who have submitted documents
- Mid-month: first round of admissions decisions are released

December 2023
- Early in the month: OSFA begins sending Estimated Financial Aid Offers to incoming freshmen, once Admissions makes their merit scholarship decisions. OSFA awards new students in waves as Admissions releases offers of admission in waves.

February 2023
- OSFA begins processing professional judgment appeals for students, which allow us to adjust data in the FAFSA for things like unemployment
- OSFA begins awarding Georgia Commitment and other need-based scholarships to incoming students

April 2023
- Estimated Financial Aid Offers are released to continuing and transfer students
Talk to Your Campus Partners

- Who needs to know that these major changes are coming along?
  - Admissions
  - Academic Advisors
  - Athletics
  - Bursar/Business Office
  - Marketing and Communications
Campus Partner Handout

"Unabashedly "borrowed" from UNC Chapel Hill..."
Talk to Your Campus IT

- If you are on an interconnected student system, be sure your institution’s IT is aware as this major project may impact upgrades, patches, testing windows, etc.

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<th>Dept</th>
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Daniel T. Barkowitz, AVP
Financial Assistance & Student Employment University of Miami

2023–24 SASFAA President
University of Miami

- Private not-for-profit
- Approximately 20,000 students, 11K undergrad
- PowerFAIDS Implementation in a PeopleSoft Environment
- Institutional Methodology / CSS Profile (first year only)
- Meet full need of admitted undergraduates
- COA for 2023-24 is $88,440 for on-campus
- Institutional Financial Aid budget of $217M (not including athletic aid)
- Pell population of about 2,000 (or about 18%)
- Mix of merit and need-based aid (57% need-based)
Staff Preparation and Training

• Personal preparation for the last two years – from enactment in early 2021
• Staff Training since last October (2022) with more detailed training in March 2023
• Regular staff meetings and updates (every 2 weeks) with information shared
• Staff-wide mandate for Federal webinars. And increased presence at state, regional and national conferences to ensure most current information.
Appraising Senior Leadership / Project Planning

- COA memo and change due to housing cost change
  - Memo to senior leadership in September 2022, implementation memo in November 2022 once DCL was issued.
  - Raised concerns and awareness of other changes at that point
- Regular updates to colleagues in EM and VP EM
- Significant institutional senior leadership changes in June 2023 (EVP Finance, Provost)
- Creation of a FAFSA Implementation Working Group (July 2023) with new senior leadership representation
  - Regular meetings
  - SAI modeling
  - Policy questions / finance questions
Decision Points (TBD)

• As we meet full (IM) need with institutional financial aid, changes from the EFC to SAI have implications for our students.

• We have (in the past) floored our IM contributions to FM levels (i.e. if the IM PC calculated as lower than the FM PC, we would use the FM PC for institutional aid).

• In what ways are we holding harmless returning students whose IM EFC (after flooring to new FM SAI) may be dramatically different in year 2, 3 or 4)?

• How are we handling multiple students in college for IM purposes if we floor to FM?

• How will we measure IM EFC for incoming students when the IM EFC is significantly lower than the FM SAI?
Contact Information

Daniel Barkowitz, AVP, University of Miami, dbarkowitz@miami.edu
Dr. Kathy Bialk, Executive Director, University of Kentucky, kathy.bialk@uky.edu
Dr. Melissa Pizzo, Arizona State University, melissa.pizzo@asu.edu
Robert Clarke, Senior Director, University of Texas at Dallas, robert.clarke@utdallas.edu
Nancy D. Ferguson, Director, University of Georgia, nferg@uga.edu