

FAFSA Simplification Planning and Project Management

TOGETHER
WE MAKE DREAMS COME TRUE





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!

Webinar Series

Date	Time	Webinar Session Title
July 25, 2023	2:00 - 3:30 pm EST	FAFSA Simplification Planning and Project Management
August 8, 2023	2:00 - 3:30 pm EST	It's FISAP Time!
September 19, 2023	2:00 - 3:30 pm EST	Delayed FAFSA: Communication and Outreach Strategies
October 17, 2023	2:00 - 3:30 pm EST	Deep Dive into the New FAFSA
November 14, 2023	2:00 - 3:30 pm EST	Cost of Attendance Budget Policy Development and Data Collection Methods for COA Components
December 5, 2023	2:00 - 3:30 pm EST	SASFEEA Town Hall Post-FSA Conference
January 24, 2023	2:00 - 3:30 pm EST	Epic Changes to Pell Grant Awarding Coming Your Way
February 13, 2024	2:00 - 3:30 pm EST	Intro to SASFEEA & 1st time Conference Attendees
March 19, 2024	2:00 - 3:30 pm EST	Professional Judgment: Special or Unusual Circumstances
April 16, 2024	2:00 - 3:30 pm EST	Awarding title IV Aid for Crossover Periods: Just in time for Summer Aid Packaging
May 14, 2024 - 10:00 am	10:00 - 11:30 am EST	Hot Topic / TBD



Kathy J. Bialk, Executive Director Student Financial Aid & Scholarships University of Kentucky

2023-24 SASFAA Webinar Series Chair

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.

(J:) > FAFSA Simplification Act

Name	Date modified	Type
2023-24 Changes	6/6/2023 1:28 PM	File folder
2023-24 EDE Technical Reference	7/23/2023 10:17 AM	File folder
2024-25 Changes	6/6/2023 1:36 PM	File folder
2024-25 FAFSA ISIR Specifications Guides	7/23/2023 10:30 AM	File folder
2024-25 SAI Modeling	6/27/2023 11:16 AM	File folder
FAFSA Simplification Act regulations	6/6/2023 1:34 PM	File folder
FAFSA Simplification Project Mgmt	6/6/2023 1:30 PM	File folder
FSA - Better FAFSA Better Future Training ...	7/23/2023 10:12 AM	File folder
NASFAA FAFSA Simplification Training	7/23/2023 7:56 AM	File folder
UK Outreach FAFSA Simplification	7/23/2023 8:04 AM	File folder

Why are Project Plans Important?

Sets the Stage

Baseline
Direction

Defines Goals
& Objectives

Instills
Accountability

Confirmation
of Resources

Forecasting
Challenges

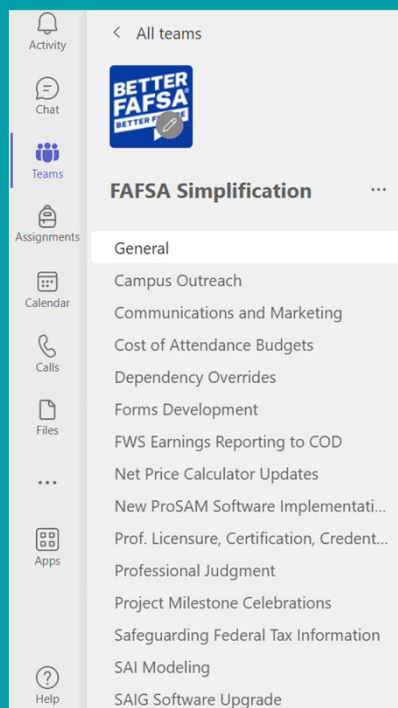
Better
Outcomes

Project Management Tools

- [NASFAA Simplification Implementation Checklist](#)
- [Better FAFSA Better Future Road Map](#)
- Microsoft Excel
- Networking!
- Free Project Management Software
 - [monday.com](#): Best for Brainstorming
 - [Airtable](#): Best for Tracking Data
 - [ClickUp](#): Best for Unlimited Free Plan Members
 - [Todoist](#): Best for To-Do Lists
 - [Teamwork](#): Best for Milestones
 - [Microsoft Planner](#): Best for Microsoft 365 Users
 - [Notion](#): Best for API
 - [Confluence](#): Best for Jira Users
 - [Trello](#): Best for Kanban Boards
 - [Wrike](#): Best for Custom Work Views

<https://www.forbes.com/advisor/business/software/free-project-management-software/>

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

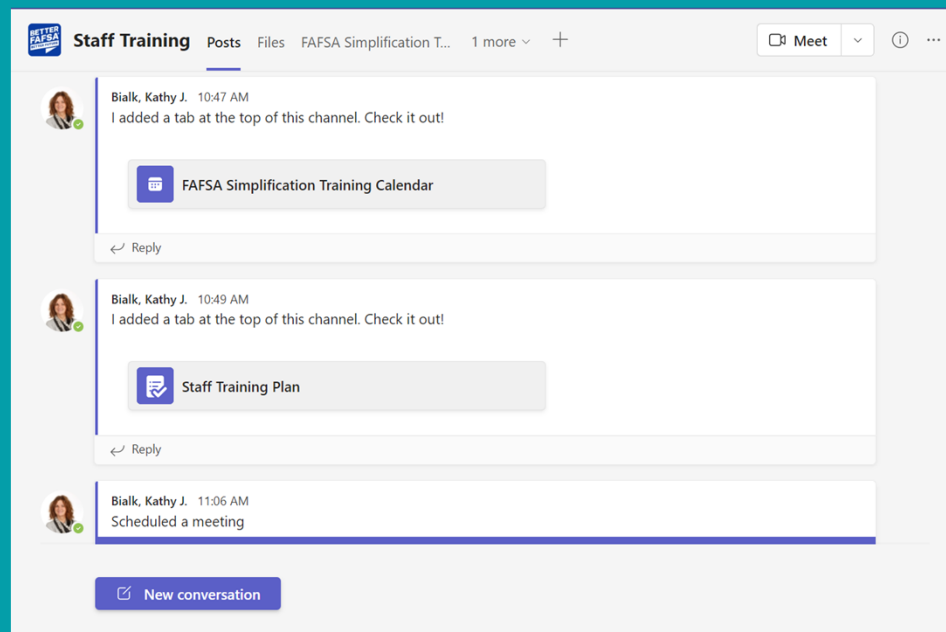


Planner



Calendar

FAFSA Simplification Project Management: Microsoft TEAMS – Training Channel/Posts



FAFSA Simplification Project Management: Microsoft TEAMS – Training Channel/Files

The screenshot shows the Microsoft Teams interface for a channel named 'Staff Training'. The channel header includes a logo for 'BETTER FAFSA' and navigation options like 'Posts', 'Files', and 'FAFSA Simplification T...'. Below the header, there are action buttons for '+ New', 'Upload', 'Edit in grid view', 'Share', 'Copy link', and 'All Documents'. The main content area displays a table of files and folders.

Name	Modified	Modified By
FAFSA - Better FAFSA Better Future Training	30 minutes ago	Bialk, Kathy J.
KASFSA FAFSA Simplification Training	28 minutes ago	Bialk, Kathy J.
NASFSA FAFSA Simplification Training	29 minutes ago	Bialk, Kathy J.
SASFSA FAFSA Simplification Training	28 minutes ago	Bialk, Kathy J.

FAFSA Simplification Project Management: Microsoft TEAMS - Training Channel/Planner

The screenshot shows the Microsoft Teams Planner interface for a channel named "Staff Training". The channel name is displayed at the top left, along with a "Posts" tab and a "Staff Training Plan" dropdown menu. Below the channel name, there are options for "Group by Bucket", "Filter", "List", and "Board". The main area is titled "To do" and contains a list of tasks. The first task is "Order Lunch for 'Lunch & Learn Webinars'" with a due date of "08/04" and a profile picture of a woman. The second task is "Set Up Dates for Lunch & Learn 'Better FAFSA Better Future' Lunch & Learn Webinars" with a due date of "07/28" and a "FR" status indicator. There is also an "Add new bucket" option on the right side of the "To do" section.

BETTER FAFSA Staff Training Posts Staff Training Plan 2 more +

Group by Bucket Filter List Board

To do Add new bucket

+ Add task

Order Lunch for "Lunch & Learn Webinars"

08/04

Set Up Dates for Lunch & Learn "Better FAFSA Better Future" Lunch & Learn Webinars

07/28 FR

FAFSA Simplification Project Management: Microsoft TEAMS – Training Channel/Calendar

The screenshot displays the Microsoft Teams interface for a channel named "Staff Training". The "Training Calendar" tab is active, showing a calendar for July 2023. A specific event is highlighted on Tuesday, July 25th, from 2 PM to 3 PM. The event details are as follows:

Date	Day	Time	Event Title	Organizer
25	Tuesday	2 PM - 3 PM	SASFSA Webinar: FAFSA Simplification Planning and 128 Funkhouser	Bialk, Kathy J.



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

Subject	Update	Questions?	Answer
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 students housing choice. https://askregs.nasfaa.org/MyAccount/LogOn?ReturnUrl=%2farticle%2f36555%2fcan-a-school-assume-housing-status-when-packaging-students		
Negative SAI and impact on FNA	A negative SAI is considered 0 for the need calculation		Schools report FWS wages to ED to calculate eligibility. Comment period ends July 12, 2023. https://fsapartners.ed.gov/knowledge-center/library/federal-registers/2023-06-12/comment-request-federal-work-study-fws-wages-student-aid-index
FWS & SAI		what is the comment request for FWS wages and SAI?	
SAI and proration		Removes proration of SAI for periods of enrollment other than 9 months?	SAI will not be prorated
Pell		Pell min/max is only determined by poverty level?	July 6th training should provide more info
		the -1500 SAI is still used in the need based aid calculation? or is it 0 SAI?	A negative SAI is considered 0 for the need calculation

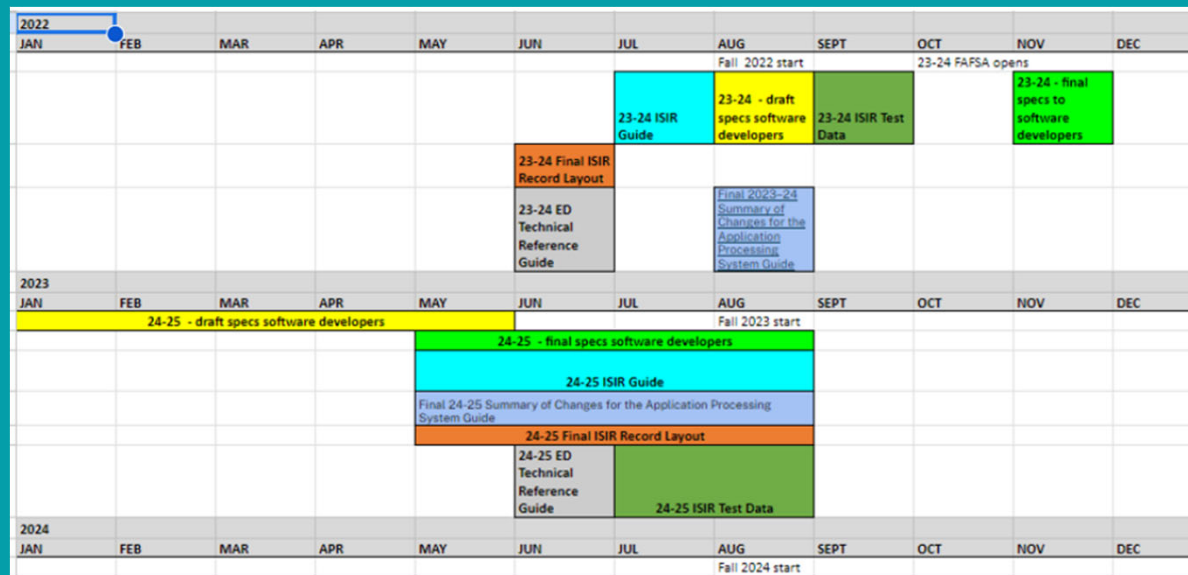
FSA Timeline

- Quick reference for teams
- Inform timelines

Planned Releases	December 2022	Spring 2023	Early Summer 2023	Summer 2023	Late Summer 2023	Fall 2023
ISIR Record Layout	Rough Draft	Draft		Final		
FAFSA Specifications for Software Developers		Draft		Final		
Summary of Changes for Application Processing		Draft		Final		
Test ISIRS					Test	
FSA virtual training - 24-25 FAFSA Simplification and Implementation						11/28 - 12/1
FAFSA Specifications Guide, Introduction	Released					
FAFSA Specifications Guide, Volume 1 – Summary of Changes						Release
FAFSA Specifications Guide, Volume 2 – FPS Schedule and Getting Help			Release			Release
FAFSA Specifications Guide, Volume 3 – Electronic Data Exchange and FAFSA Processing			Release			Release
FAFSA Specifications Guide, Volume 4 – Record Layouts and Processing Codes	Released	Release				Release

Timeline Comparison

- Quick reference for teams
- Visual representation of timeline



FAFSA Simplification Checklist

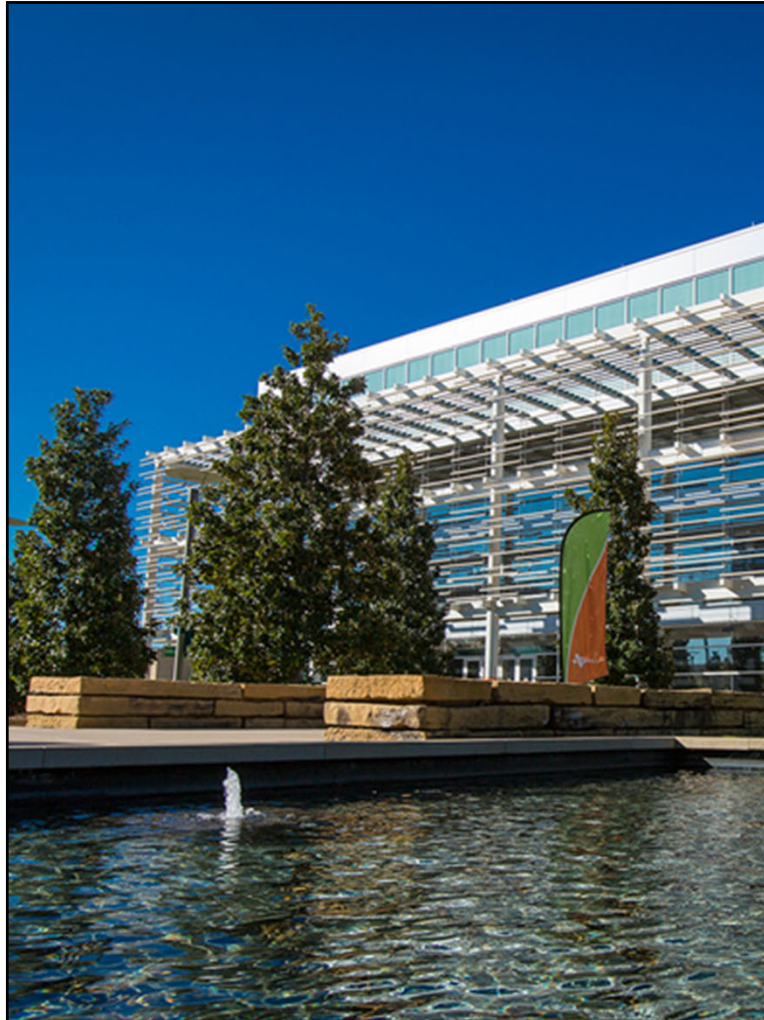
- Major concepts identified
 - Cost of Attendance
 - Internal/External Stakeholders
 - Communications and Outreach
 - Institutional budget impacts EFC vs SAI
 - Policies and Procedures
 - Training
- Track by timeline, status, & impact to doc model, webforms, P & P

ENGAGE CAMPUS STAKEHOLDERS									
Resource(s)	Task	Recommended Timeline	Status	Doc Model	Webforms	P&Ps	COA	Packaging	Train
	Financial aid budget decision makers (to ensure any newly identified budget needs are accounted for)	After completing steps in "Estimate Institutional Budget Impact of FAFSA Simplification Provisions" section							
	Enrollment Management Team and 3rd Party Vendor(s) (to determine leveraging and monitor impacts on institutional aid budget, discount rate and headcount priorities)	ASAP							
	Information Technology (to implement campus systems changes necessitated by FAFSA simplification changes)	ASAP							



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

FAFSA Simplification Readiness-UT Dallas

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

Take our assessment to get a comprehensive picture of your project and portfolio management maturity.

smartsheet

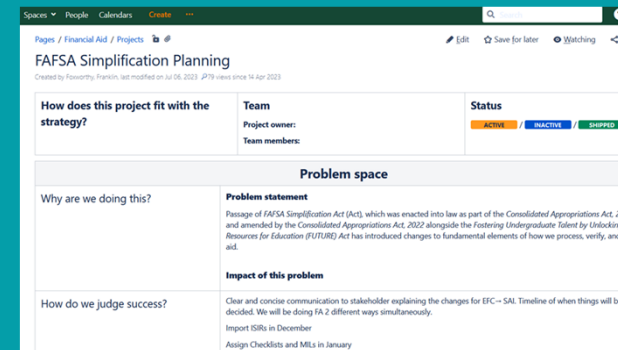
File Automation Forms **FAFSA Simplification Project** ★

Gantt View Filter Arial 10 B I U

	Task Name	Duration	Start	Finish	Predecesso...	As
1	Task Force Members					
3	Meetings					
4	April 20, 2023					
5	next meeting? April 28, 2023					
6	May 9, 2023					
7	Major components and changes/updates related to FAFSA Simplification					
8	Application changes					
9	Student Aid Index					
10	Communicating this to various constituents					
11	Senior admin					
12	Departments					
13	Students					

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



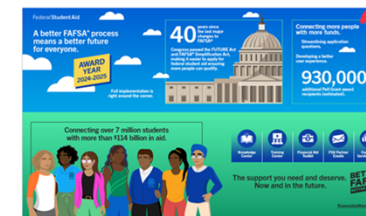
FAFSA Simplification Roadshow

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

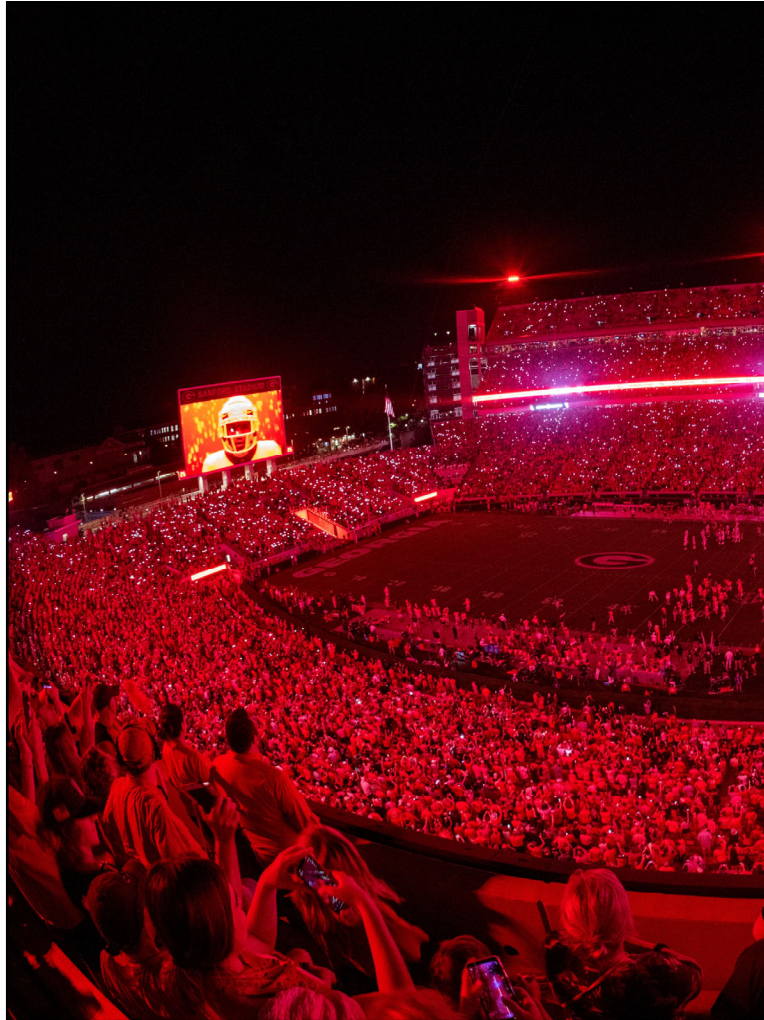
FAFSA Simplification Next Steps- Opportunities

- 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

2024-2025 Updated FAFSA Implementation Timeline

2023-2024

October 2022

- **October 1: the 2023-2024 FAFSA is released to the public**
- ArchNews sends out a FAFSA reminder email to the campus community
- Undergraduate Admissions sends FAFSA reminder emails to potential freshmen
- Mid-Month: EMS installs the Banner upgrade allowing us to import FAFSAs. Testing takes approximately 2 weeks.
- OSFA is able to load student FAFSA data

November 2022

- 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 2022

- 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 on 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

- 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

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...*

Office of Student Financial Aid
UNIVERSITY OF GEORGIA
FAFSA SIMPLIFICATION FACT SHEET

Overview of changes

WHAT IS THE FAFSA SIMPLIFICATION ACT?

- a more streamlined application process,
- expanded eligibility for federal financial aid,
- reduced barriers for certain student populations, and
- a better user experience for the FAFSA form.

CURRENT KEY INFORMATION AND TALKING POINTS:

2024-2025 FAFSA NOT AVAILABLE UNTIL DECEMBER

STUDENT AID INDEX IS REPLACING EFC IN THE FORMULA

FORMULA CHANGE WILL MEAN MORE PELL FOR SOME STUDENTS

COST OF ATTENDANCE
STUDENT AID INDEX
FINANCIAL NEED

BENEFITS & WHAT'S NEXT

Office of Student Financial Aid
UNIVERSITY OF GEORGIA
FAFSA SIMPLIFICATION SHEET

Overview of changes

WHAT DOES THIS MEAN FOR STUDENTS?

REPLACING THE EXPECTED FAMILY CONTRIBUTION WITH THE STUDENT AID INDEX

The new Student Aid Index will be a better measure of a student and their family's ability to pay for college.

EXPANDING ACCESS TO FEDERAL AID

The FAFSA Simplification Act expands the Federal Pell Grant to more students and links eligibility to family size and the federal poverty level.

WHAT'S NEXT

December 2023:
2024-25 FAFSA released

January 2024:
Ellician to release software upgrade

March 2024:
Estimated Financial Aid Offers released

THE OFFICE OF STUDENT FINANCIAL AID WILL KEEP THE CAMPUS COMMUNITY UPDATED AS WE LEARN MORE.

Talk to Your Campus IT

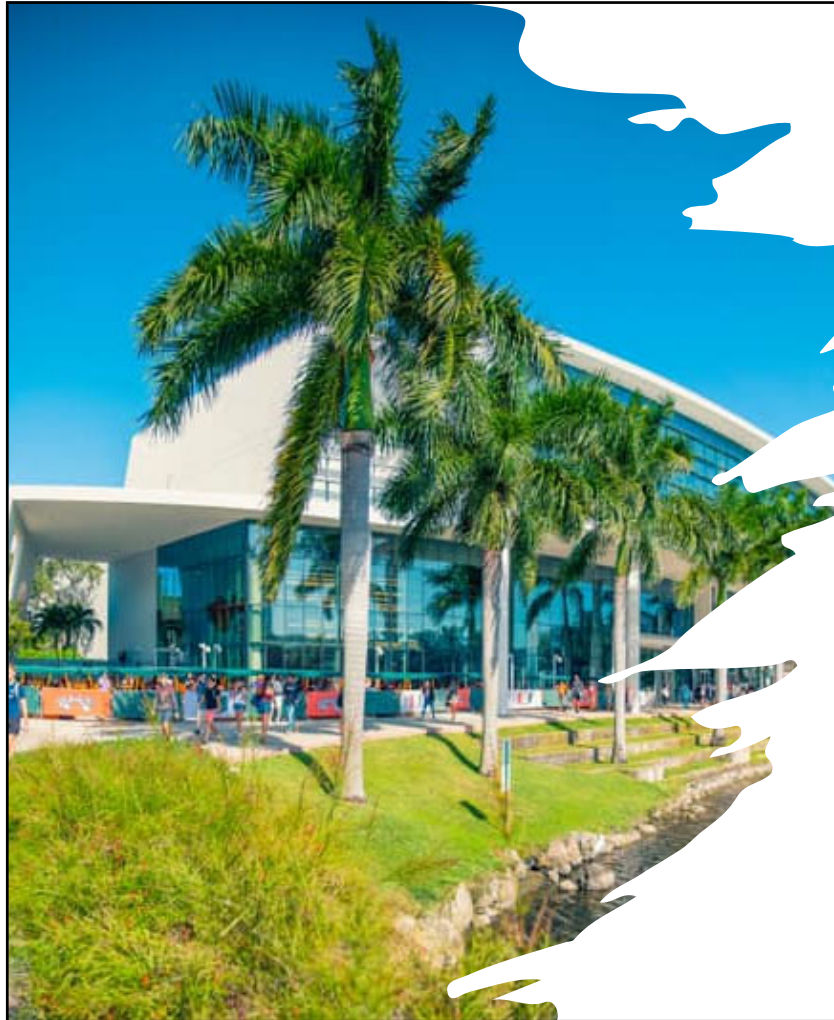
- If you are on an interconnected student system, be sure your institution's IT is aware as this major project may impact upgrades, patches, testing windows, etc.

Project	Dept	Start Date	Q3 2023			Q4 2023			Q1 2024			Q2 2024			Q3 2024		
			Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Fall 2023 - Final Exams	ST	12/07/23						12/13/23									
Clone Banner PROD to PPRD	SIS - ALL	12/11/23						12/14/23									
Fall 2023 - Commencement	ST	12/15/23						12/15/23									
Banner Quarterly Patching - PROD - 4Q2023	SIS	12/16/23						12/16/23									
Fall 2023 - Grades Due / End of Term Processing (Registrar)	ST	12/18/23						12/18/23									
Fall 2023 - End of Term Processing (Financial Aid)	FA	12/19/23						12/19/23									
ADC (USG Academic Data Collection) - Fall EOT Census II Date	ST	12/20/23						12/20/23									
Financial Aid Upgrade Placeholder - New Aid Year, Part 1 / ISIR (normally Sep-Oct)	FA	12/01/23						12/22/23									
UGA Holiday - Christmas Holidays	Important	12/25/23						12/29/23									

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?

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