

Annual Conference October 2-3, 2023 Boise Centre

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|  | **Day 1: October 2** |  | |  |
|  | **SESSION** | **PRESENTER** | | **MINUTES** |
|  | Conference Welcome | Kelley Christianson, IASFAA President | | Kelley provided welcome remarks, the President's reception to follow last session, and invited everyone to participate in our silent auction. |
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|  | Keynote | Jeremiah Shinn, Ph.D.  Boise State  VP Student Affairs Enrollment  Management | | Jeremiah spoke about his appreciation for financial aid professionals and everyone having equal access to college. He shared his journey to higher ed as a 1st generation, Pell eligible, rural student. He shared something as simple as a smile can have a profound impact on a student’s success. He commended us for all the hard work we do.  Members participated in an activity: Things about work that gives me pride; what I wish colleagues on campus understood better; what do I need to be a better version of my professional self and thank a college. |
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|  | Inside the Beltway | Rachel Gentry, NASFAA Director of Government  Relations | | Rachel provided an overview of government updates relating to federal updates and a technical discussion. She outlined the potential government shutdown, recent developments and the implication on federal agencies and financial aid.  Rachel elaborated on the political aspect relating to federal financial aid and some of the promises made during the Biden campaign including free college, increasing the Pell Grant, debt cancellation and loan forgiveness while mentioning we are getting closer to the 2024 presidential campaign and how this may impact current initiatives.  Rachel shared recent developments in the education space within the White House and on Capitol Hill. The HEA and the need to update to address evolving student and institutional needs.  Rachel discussed the FAFSA Simplification Act and its significance to higher education policy including the challenges relating to the current and future political landscape. The federal budget and funding for 2024 and recent 45-day funding extension to avoid a government shutdown. Appropriations start with President Biden's budget proposal and subsequent proposals form the House of Representatives and the Senate. Proposals, which are analyzed include potential cuts or increases in education funding.  Rachel shifted focus to ED and the ongoing developments with student loans including servicers, public student loan forgiveness, and income driven repayments. Repayment has started. Rachel shared that borrowers would have a year without the consequence of being reported to a credit bureau or other negative impacts of not being able to pay. Rachel shared the recent update regarding gainful employment and new metrics. Borrowers will have to sign an acknowledgement if their program has what is deemed to be a low financial value return on their investment. In addition, there has been an increased amount of borrower defense claims reported by schools.  Rachel highlighted two initiatives by NASFAA, the College Cost Transparency and the return to student loan repayment including the development of the student loan repayment toolkit. |
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|  | FAFSA Simplification | Rachel Gentry, NASFAA Director of Government  Relations | | Rachel spoke about the changes related to the 2024-25 FAFSA application process. The FSA ID will be required for contributors. All contributors must provide consent to transfer data from IRS to FAFSA, even if data cannot be transferred. Without consent, the student becomes ineligible for Title IV aid. A prototype was just released for the 2024-25 FAFSA allowing users to explore before the full launch in December.  Notable changes for the 2024-25 include a shift from housing size to family size based on federal tax information, the removal of the number of family members enrolled in college as a factor in the federal need analysis, removal of various untaxed income items from the needs analysis aligning with only including items included on federal tax returns, and child support being categorized as an asset. Estimated financial assistance will now be referred to as “other financial assistance.” Iraq and Afghanistan Service Grant and Children of Fallen Heroes will self-identify, and schools will certify by collecting supporting documentation. Certification will carry forward for subsequent years.  Rachel concluded by highlighting efforts to provide resources and support to schools, including a comment code crosswalk, the SSI modeling tool, and various other resources available on their website. Rachel ended with answering a few questions from attendees. |
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|  | **Day 2: October 3** |  | |  |
|  | **SESSION** | **PRESENTER** | | **Minutes** |
|  | WASFAA Update | Amanda Cornelius WASFAA President  AVP, Enrollment Management  Northern Arizona University | | Amanda opened with remarks about mission statements and vision statements along with the structure and function of WASFAA. WASFAA is committed to supporting its members by providing resources, training and access to NASFAA. Amanda reiterated the importance of member involvement. Amanda stressed the interest in volunteering for committees based on preferences and availability.  Amanda spoke about the positive developments within the organization, including fall regional training with certifications, engaging online webinars, and the leadership development program.  Amanda mentioned open nominations for various executive positions, the upcoming dates for the annual conference, and the positive aspects of the regional conference. Attendees have a chance to interact, ask questions, and stay informed.  Amanda concluded by asking if there were questions. |
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|  | GenZ: It’s a Vibe - How we connect with a new generation of students | Ramond Yee SallieMae | | Raymond spoke about the importance of understanding and supporting the Generation Z population. Raymond discussed the reasons students leave school, including mental health challenges. Raymond stated Sallie Mae’s mission to build students’ confidence and success in higher education.  Raymond explained the Gen Z age range is defined 2010 to 25 years old who are true digital natives, being the first to come of age with smartphones and the web as a commonplace. Gen Z’s navigate life in a vastly transformed world. They challenge traditional norms related to race, gender, and identity. They are often described as “fluid”. The influence of technology and its role have shaped their expectations and behaviors. Gen Z expects personalized, intuitive, customizable experience. Gen Z’s demand brands to recognize and cater to their uniqueness. They are more apt to share their personal data.  Raymond emphasized the importance of transitioning from word-heavy emails to more visual and infographic-based communication to capture Gen Z's attention. The shift from email to texting as a communications strategy and the need to cater to Gen Z’s expectations. Gen Z preferences for authenticity; characterized by good intentions, corresponding words, and aligned actions, is vital to Gen Z, influencing their brand choices and financial decisions. Gen Z heavily relies on social media for financial opinions and values authenticity in communications.  Raymond noted the mental health concerns among Gen Z and how educational institutions are addressing the issue by providing support and resources to students. Overall, there is a need for adapting communication strategies and support mechanisms to cater to Gen Z's preferences, mental health concerns, and information access habits.  Raymond concluded by asking for questions. |
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|  | Internal and External Threats  Facing Title IV Institutions | Adam Shanedling  Office of the Inspector General | | Adam spoke about the role and responsibilities of inspectors general within various U.S. government departments, focusing on the inspector general within the Department of Education. Adam emphasized that inspector general’s act independently within their respective departments to identify fraud, waste, and abuse.  Adam shared insights into investigations related to financial aid fraud, emphasizing the importance of vigilance and collaboration between educational institutions and law enforcement agencies to combat fraudulent activities. Adam touched on the consequences of fraudulent actions, including disqualification from participating in federal programs. Adam discussed various cases related to fraud and scams in the context of education and financial aid. Adam stressed the importance of vigilance, asking questions, and educating students to recognize and avoid scams.  Adam covered best practices and emphasized the importance of reporting suspected fraud and irregularities related to financial aid. Adam explained the significance of not being complicit in fraudulent activities and stressed the need to report such incidents through secure channels. Adam shared contact information for direct reporting and encouraged open communication for efficient handling of reports.  Adam concluded by inviting further inquiries and discussions. |
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| How to Leverage Social Media to Increase Student Engagement | | | Rosemary Martinez-Kepford, Earnest | Rosemary discussed strategies for effective communication with students regarding financial aid and deadlines, emphasizing the use of social media and modern communication tools. Rosemary highlighted the importance of capturing students' attention through platforms like TikTok, Twitter, and text messaging. Rosemary mentioned utilizing reviews, surveys, and AI-powered chatbots like ChatGPT for enhanced communication. Rosemary shared an example of a college using digital ambassadors to improve communication and engagement with students.  Rosemary concluded by encouraging feedback through QR code. |
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| LUNCH / Business Meeting | | | 23-24 IASFAA Executive Council | Meeting called to order Tuesday, October 3, 2023, at 12:30 p.m.  (Executive Council present: Kelley Christianson-President, Boise State; Laura Hughes-Past President, LCSC; Yazmin Zalazar-Vice President, Boise State; Kait Chase-Secretary Treasurer, Boise State; Sylvia Turley-Representative at Large, BYU-Idaho)  Kelley, shared the association's executive council (EC) and its members, detailing their roles and functions. Kelley mentioned that the president typically gets to attend the National Leadership Conference and Expo for training and leadership development. Kelley further explained the functions of various positions, including the past president, vice president, secretary-treasurer, and representative-at-large. Kelley provided an overview of EC activities and updates since the current EC took office, such as renewing the association's website, transfer of EC members to Wells Fargo bank accounts, implementing Google for email and document management, purchasing liability insurance (Chubb), filing IRS 990-N, and sharing that the 2023-24 EC meeting minutes have been posted to the IASFAA website.  Kelley gave information on membership statistics and clarified the distinction between active and associate members.  Kait shared the 2022-23 Treasury report including current checking, savings, and CD amounts. CD was recently moved into a higher yield interest rate CD (4.64%). Covered current revenue and conference expenses.  Kelley asked for feedback on the future of IASFAA including increasing membership fees. Current members inquired about institutional membership. Kelley will look into the idea of institutional membership. Kelley mentioned potential venues for future conferences such as hosting at a member institution/college. A member posed the question of having vendor/s sponsor food as a way to reduce costs of conference. A member mentioned creating a Listserv in order to be more intentional about networking as well as a place to collaborate. A member suggested a quarterly report/meeting for best practices and tips. Kelley suggested having a quarterly meeting (Zoom or other similar format) on a topic such as ChatGPT. Kelley will be sending a survey for feedback. Other questions were discussed including do we want to join Nevada, do we want to rotate meeting locations (Boise is central to most institutions, do we want to vote for president, we currently don’t have a president elect.)  A vote was called for lifetime members.   * A motion was put forward for Roxanne as a lifetime member by John Bender, motion was seconded by Tiffany Cleverly, and vote was called. All members were in favor. * A motion was put forward for Dan Davenport as a lifetime member by James Martin, motion was seconded by Dwight Berreth, and vote was called. All members were in favor. * A motion was put forward for the EC to review Idaho retirees for lifetime memberships by Laura Hughes; motion was seconded by James Martin, and a vote was called. All members were in favor. This will be further discussed at a future EC meeting.   A motion to adjourn the meeting was put forward, the motion was seconded, all were in favor and the meeting adjourned at 1:45 p.m. |
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| State Programs Updates: Idaho Opportunity  Idaho Launch  Idaho FAFSA Completion Efforts | | | Joy Miller, OSBE Sherawn Reberry, WDC Jenni Kimball, OSBE | Jenni Kimball, OSBE College and Career Programming Manager, spoke about State FAFSA initiatives. In March there was a FAFSA summit where increasing FAFSA completion was discussed. Four committees were formed. A FAFSA toolkit was created. Jenni shared information about national statistics. Idaho FAFSA completion for 23-24 was 40.6% of HS seniors, nationally the number is 53.4%. Idaho is still behind but the number of HS seniors completing the FAFSA has increased. OSBE staff members attended FAFSA training to train the trainer. Webinars, information for counselors, and a FAFSA simplification worksheet to help with FAFSA completion.  Joy Miller disc used the ID Opportunity Scholarship and a change that could impact future recipients who attend a community college. The ID Opp has been designated for four-year institutions. The change doesn’t impact current recipients. Contingent offers will be made in December. The application opened October 3, 2023, and the deadline will still be March 1, 2024. The ID Governor's Cup will be in the same application and the deadline is March 1st as well. There will be a new Gear Up for 2024-25 graduates, the Armed Forces/Public Safety Officers award is specific for students who had a parent/s killed or that are 100% disabled (unemployable)  Sherawn Repberry from the Workforce and Development Council spoke about the Idaho Launch grant program. Idaho Launch is for in demand careers (in demand was defined by 50 or more openings according to the BLS and information on in demand careers for Idaho can be found online). The FAFSA for Idaho Launch is not a requirement. The award is up to $8,000, of which 50% of the initial grant can be in the first year unless the program is less than 12 mounts. Recipients must begin in the fall. There are extensions for certain situations such as military and religious service reasons. A career pathway plan is required. The priority deadline to apply is November 30 and the deadline is April 15, 2024, to apply.  Wendi Secrist, Executive Director for Workforce Development Council, spoke and answered a few questions. One question was if Idaho Launch can be stacked with the Idaho Opportunity Scholarship. Wendi shared recipients can receive both awards; however, the Idaho Launch grant is tuition only and not refundable.  Cate Collins from the OSBE demonstrated the new scholarship application site taking us through the application as a student would experience it. Applicants need an email address, their DOB, SSN, and legal name.  The session concluded with open questions. |
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| The Economics of Frustration: Financial Instability is the Top  Barrier to Student Success | | | Wendy Papkoff, Campus Logic | Wendy opened her presentation by sharing statistics on reasons students dropout of school. According to the research Wendy shared, 3 out of 4 students drop out due to finances. Wendy gave information about a book, Student Financial Success, which provides a road map to meet students where they are.  Wendy shared barriers to student success including reasons why students don’t attend due to finances, reasons students drop out due to finances, and other reasons why students drop out including academic success. From statistics for 2021, 40% of students drop out each year without a degree. Another statistic shared was that those who don’t have a college degree make an average $21,000 less than those who graduate.  Wendy concluded by asking for any questions. |