



**NASFAA**

NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS



# 2022-23

## ANNUAL REPORT

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## A MESSAGE FROM OUR NATIONAL CHAIR AND PRESIDENT

As we navigate the ever-changing landscape of higher education, we want to share a few words on perseverance and facing challenges, qualities that are at the core of your work, particularly as we prepare for some of the most significant changes to our field in decades.

In our role, we often witness the trials and tribulations that students and their families go through to secure an education. As financial aid professionals, we are not just the architects of financial solutions, but the guardians of hope and perseverance. The role may sometimes feel unsung, but it is vital in shaping countless students' future. We are not just managing budgets or programs, but investing in futures for countless individuals.

In these moments, our guidance, support, and unwavering commitment come into focus. In our daily interactions, financial aid administrators instill the idea that setbacks are not roadblocks, but stepping stones to success. You are a source of encouragement and motivation, and you remind students that no matter how tough the road may be, it's worth the journey. Let's not forget that the long hours worked behind the scenes are ultimately for the benefit of the students we serve.

We've witnessed time and again the support this community provided one another through mentorship and fellowship. In the last year, we've seen the financial aid community mentor others, share deep knowledge, send encouraging messages, troubleshoot, and work together toward the shared goal of increasing student access to and success in postsecondary education.

As you face the challenges and complexities in the weeks and months to come, know that your work is profoundly meaningful to our students and each other. Your commitment to fostering a more equitable and educated world is a beacon of hope for many.



**Brad Barnett, FAAC®**  
2022-23 NASFAA National Chair

A handwritten signature in black ink that reads "Brad Barnett".



**Justin Draeger**  
NASFAA President & CEO

A handwritten signature in black ink that reads "Justin Draeger".

# GOVERNANCE AND LEADERSHIP



In 2022-23, NASFAA's [Board of Directors](#) met twice in person and several times virtually. The board, led by National Chair Brad Barnett, welcomed two new appointed, voting board roles to its ranks, with the addition of the Diversity Officer and Board Secretary.

NASFAA's chief governing and oversight body developed and rolled out a new [three-year Strategic Long-Range Plan](#), provided critical fiscal and strategic oversight, bolstered NASFAA's mission through key programmatic offerings, and remained agile to best serve the membership. Among the significant board [activities and actions](#) for 2022-23 are:

- The approval to move forward on a NASFAA-led initiative to examine and improve institutional financial aid offers
- [Leadership Conference](#) 2023 budget approval
- Fiscal year 2021-22 [audit](#) approval
- The approval of updated committee charters for the Financial Affairs Committee (FAC), the Nominations & Elections Committee (NEC), the Association Governance Committee (AGC), and the Ethics Commission
- The approval of a report from the [Pell for Incarcerated Students Task Force](#)
- CEO Compensation Policy approval
- Approval to hold [membership dues](#) steady for 2023-24
- [National Conference](#) 2023 budget approval
- Approval of a Values-Based Live Site Selection Framework
- [Executive Leadership Collective](#) (ELC) budget approval
- Approval of the [Resumption of Loan Repayment Task Force](#) report
- Approval of the [Advancing the Profession Task Force Toolkit](#)
- NASFAA's [2023 award](#) nominees approval
- Approval of the [2023-26 Strategic Long-Range Plan](#)
- Rosters for the 2023-24 standing committees (AGC, FAC, NEC, Ethics, and Awards) approved
- Approval for NASFAA to manage the [College Cost Transparency Initiative](#)

## 2022-23 NASFAA BOARD OF DIRECTORS

### Officers

National Chair: Brad Barnett,  
*James Madison University*

National Chair-Elect: Helen Faith,  
*University of Wisconsin-Madison*

Past National Chair: Brent Tener,  
*Vanderbilt University*

Treasurer: Kelly Morrissey,  
*Community College of Rhode Island*

Diversity Officer: Derek Kindle,  
*University of Wisconsin-Madison*

Secretary: Danchees Ingram,  
*University of Texas Southwestern Medical Center*

### Regional Representatives

EASFAA: James Anderson,  
*Montclair State University*

MASFAA: Heidi Carl,  
*Purdue University*

RMASFAA: Angela Karlin,  
*University of Kansas*

SASFAA: Celena Tulloss,  
*University of Tennessee*

SWASFAA: Amy Cable,  
*Louisiana Community and Technical College System*

WASFAA: Sarah Everitt,  
*Gonzaga University*

### Representatives-at-Large

Joseph Donlay,  
*Colorado State University*

Sandy Neel,  
*Spalding University*

Sharon Oliver,  
*North Carolina Central University*

Chris Pollard,  
*The George Washington University Law School*

Marvin Smith,  
*University of California, Los Angeles*

Angelika Williams,  
*University of San Francisco*

### Ex Officio

President: Justin Draeger,  
*NASFAA*

NASFAA CFO: Mitchell Weintraub,  
*NASFAA/Cordia Partners*

## Financial

The 2022-23 year represented a continued return to predictability and stability, as NASFAA staff, volunteers, and members experienced a return to normal operations following the disruptive years of the COVID-19 pandemic. Despite ongoing market volatility, NASFAA exceeded revenue projections and ended the year in a budget surplus.

In 2021-22, NASFAA's Board leadership, determined to support members who have been struggling with budgets and staffing coming out of the pandemic, enacted the multi-year NASFAA Gives Back initiative, a first-of-its-kind initiative intended to bolster and support our loyal members. As part of this commitment, the board held members' dues steady with no increases for both 2022-23 and 2023-24. In fiscal year 2022-23, NASFAA also provided a \$600 Learning Credit to more than 1,700 institutions, for a total gift of \$1.02 million.

## POLICY AND FEDERAL RELATIONS: ADVOCACY, RESEARCH & GRANTS



## Legislative Advocacy

NASFAA's legislative advocacy in 2022-23 focused on funding for the federal student aid programs and reforms to higher education policy impacting the aid application process, financial aid administration, and student loan repayment. With a divided Congress following the 2022 midterm elections, NASFAA continued to work closely with members of Congress across the political spectrum to deliver much-needed improvements to the student aid system.

- NASFAA continued to advocate for doubling the maximum Pell Grant and delivering robust increases to the campus-based aid programs, and remains an active partner in the [Double Pell Alliance](#). The campaign to double the maximum Pell Grant continued to build momentum, with a \$500 increase to the maximum award included in the fiscal year 2023 omnibus signed into law in December and President Joe Biden's 2024 budget proposal once again proposing to double Pell by 2029.
- As Congress and the Biden administration negotiated the terms of a debt ceiling deal that ultimately included spending caps for fiscal years 2024 and 2025, NASFAA [opposed proposed cuts](#) to nondefense spending that would have resulted in cuts to student aid.
- With the pandemic-related pause on student loan repayment still in effect and the Biden administration's proposed debt cancellation program held up in the courts, reforms to student loans remained an area of interest for Congress, and NASFAA worked with a number of offices on legislation to improve the repayment system and protect borrowers.
- NASFAA also continued to advocate for legislation to address long-standing priorities, such as the [Student Loan Tax Elimination Act](#), the [Tax-Free Pell Grant Act](#), and the College Transparency Act.

## U.S. Department of Education

NASFAA continues to engage and partner with the Department of Education on both long-term policy initiatives as well as timely problem-solving as issues arise. We ensure NASFAA's voice is [on the record](#) by submitting public comments for all of ED's initiatives that impact financial aid administrators, and we draft or sign on to community letters in areas of concern that fall outside the regulatory process. Our efforts are informed by NASFAA's members, both through formal engagements like task forces and working groups, as well as through informal channels like our [Slack Communities](#). NASFAA collaborates with external higher education policy partners to amplify efforts and ensure coordination between groups.

In 2022-23, NASFAA submitted public comments to the Department of Education on:

- FSA's Draft [Strategic Plan](#) for 2023-27
- FSA's [proposal](#) to collect annual student-level work-study earnings
- Updated third-party servicer [guidance](#)

NASFAA engaged in the Department of Education's negotiated rulemaking process with comments on:

- ED's affordability and student loans regulatory [package](#)
- ED's proposed [rule](#) on Prison Education Programs, 90/10 Rule, and Changes of Ownership
- ED's [proposed](#) new income-driven repayment plan
- ED's proposed low-financial-value [programs](#) list
- ED's [intent](#) to establish a negotiated rulemaking committee to cover topics such as return to Title IV funds (R2T4), third-party servicers, accreditation, cash management, and more

NASFAA sent letters to ED and/or signed on to community letters about timely issues, including:

- Urging ED to extend the limited [PSLF waivers](#)
- The need for a strong [partnership](#) between NASFAA and the Department of Education
- Urging the [Department of Veterans Affairs \(VA\)](#) to delay the transition to a new enrollment management system for certifying GI Bill benefits
- Updated third-party servicer [guidance](#)

NASFAA mobilized and participated on task forces and working groups:

- NASFAA remains actively engaged in implementation of the FAFSA Simplification Act and informs Department of Education efforts both through its FAFSA Simplification Implementation Working Group and our NASFAA staff presence at Federal Student Aid's biweekly FAFSA Implementation meetings.

## Research & Grants

NASFAA continued to work to solicit grant funding to support a multitude of policy, research, training, and communications efforts throughout the association.

In 2022-23, NASFAA's grant-funded work included:

- FAFSA simplification implementation policy, advocacy, marketing, communications, research, community-building, and training efforts generously funded by grants from the Bill & Melinda Gates Foundation and the Strada Education Foundation. These grant funds will continue through the 2023-24 year.
- The [College Cost Transparency Initiative](#), which was funded, and will continue to be funded for the next three years, by a grant from Strada Education Foundation.
- NASFAA's efforts surrounding [preparing for prison education programs](#), which received funding from the Ascendum Education Foundation. This grant funding will continue through the remainder of the 2023-24 year.

Outside of our grant-funded work, NASFAA's Research Department produced several reports that assisted our association's work. Our most notable work included:

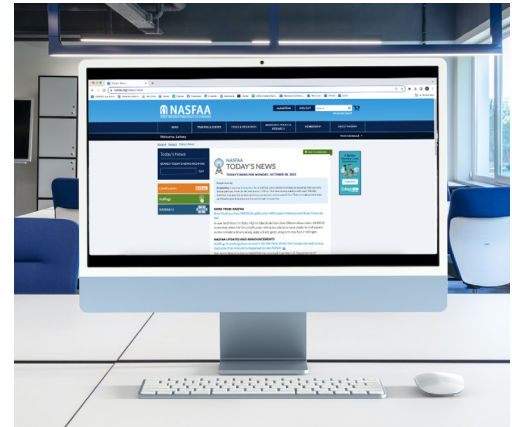
- Our annual update on the state of the Title IV programs with the [2022 National Student Aid Profile](#).
- The 2022-23 Staffing and Benchmarking Task Force, which worked with NASFAA to rewrite our biannual benchmarking survey. Their report is forthcoming.

NASFAA's Research Department continued to support the needs of other departments across NASFAA, as well as NASFAA's leadership, with data analysis and internal evaluative and administrative surveying of staff and the NASFAA membership.

## COMMUNICATIONS AND MARKETING

In 2022-23, the financial aid community was again thrown curveballs as they juggled the implementation of a streamlined FAFSA and contended with the news of a delayed launch of the form, prepared to help millions of student loan borrowers re-enter repayment, and as always worked to remain informed on a slew of regulatory activity following a series of negotiated rulemaking sessions. In this time of transition, NASFAA provided members regular updates, analysis, and guidance on navigating these challenges, in keeping with our longstanding mission of serving as a forum on student financial aid issues and ensuring financial aid professionals have access to the knowledge needed to achieve their goals.

Below are some of the milestones that the NASFAA Communications and Marketing team reached in 2022-23.



### Today's News

Year after year, members rank *Today's News* — NASFAA's newsletter emailed each weekday morning to more than 28,000 subscribers — as the most valuable benefit of NASFAA membership. A year of continued growth, with more than 1,500 new subscribers in 2022-23, demonstrated the extent to which members relied on *Today's News* for the latest updates and challenges facing the profession. NASFAA-produced news articles and podcast episodes focusing on student loan debt cancellation, FAFSA simplification, and the return to student loan repayment dominated the top content consumed this year.

### Top 10 Most-Read Articles Written by NASFAA Staff

1. [White House Provides Detailed Preview of Student Loan Debt Cancellation Application](#)
2. [Biden Takes Executive Action on Student Loan Cancellation, Extends Repayment Pause](#)
3. [Education Department Releases More Details About Biden's Loan Debt Relief](#)
4. [FSA Issues Guidance on 2023-24 Implementation Items from FAFSA Simplification Act](#)
5. [FSA Announces Date Range, Road Map for 2024-25 FAFSA Launch](#)
6. [Biden to End Pandemic's Emergency Declaration on May 11. Here's What It Means for Financial Aid](#)
7. [ED Releases 2024-25 Draft FAFSA for Public Comment](#)
8. [Biden Launches Official Application for Student Debt Cancellation](#)
9. [FSA Reminds College Presidents to Adequately Staff, Train, and Provide Resources to Aid Offices Ahead of Significant Changes to the FAFSA](#)
10. [Biden's Student Loan Cancellation Application Opens for Beta Testing](#)

## Top 5 “Off The Cuff” Podcast Episodes of 2022-23

1. [OTC Inside the Beltway: Sorting Through Biden’s Decision on Student Loan Debt Cancellation](#) - Published August 26, 2022
2. [OTC AskRegs Experts: A Blizzard of New Regulations, FAFSA Simplification Guidance, and a Quick Debrief on Midterm Elections](#) - Published November 10, 2022
3. [OTC AskRegs Experts: Examining New Guidance From ED on Third Party Servicers](#) - Published February 24, 2023
4. [OTC Inside the Beltway: What to Know About Operation ‘Fresh Start’](#) - Published October 28, 2022
5. [OTC Inside the Beltway: Updates to Biden’s Student Loan Forgiveness](#) - Published October 21, 2022

## Media Engagement

NASFAA regularly engages with members of the media to champion the association’s policy positions, share new research, and raise public awareness of the funding-related issues plaguing college students and postsecondary institutions. In 2022-23, NASFAA was [quoted or referenced](#) more than 3,700 times in national media and trade publications — up more than 571% from 2021-22, when NASFAA was mentioned a total of 561 times. NASFAA continued to improve on its proactive media outreach, publishing 26 [press releases and statements](#), in addition to targeted outreach to individual reporters throughout the year.

## Five Most-Visited Pages on NASFAA.org From July 1, 2022, to June 30, 2023

1. [NASFAA.org](#) home page (485,026 page views)
2. AskRegs [launch page](#) (125,217 page views)
3. [Today’s News](#) (63,050 page views)
4. NASFAA [Training & Events](#) (60,798 page views)
5. NASFAA [Webinars - Live & On-Demand](#) (58,964 page views)

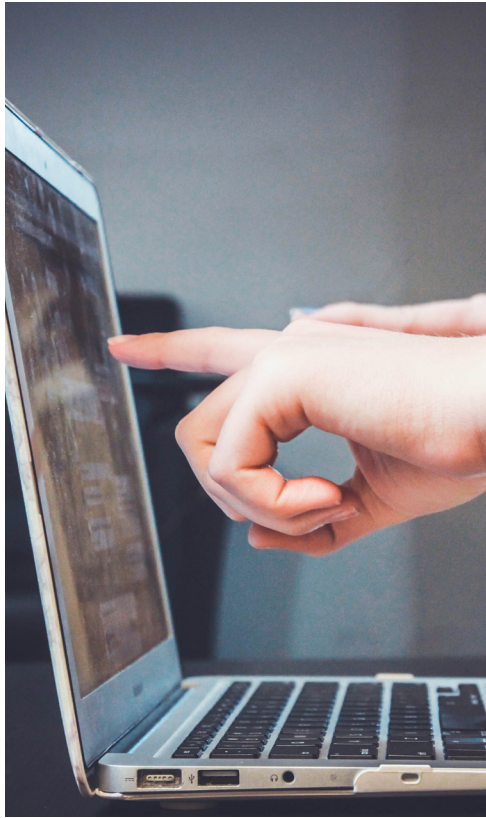
The NASFAA website had over 5.1 million total pageviews in 2022-23, up from about 4.8 million in 2021-22, a nearly 7% increase in web traffic.

## Social Media

In September 2022, NASFAA created and hired a new position, the web and marketing specialist, to assist with keeping our website and social media presence up to date, as well as extending the reach of our breaking news and *Today’s News* content. NASFAA is actively posting each week day on [Facebook](#), [LinkedIn](#), [Twitter](#), and [Instagram](#). In 2022-23, we had a total of 2,954 social media posts across our platforms with a reach of more than 1.9 million impressions.

As of June 30, 2023, we had 10,828 Facebook fans, 17,106 LinkedIn followers, 16,044 Twitter followers, and 1,613 Instagram followers. LinkedIn had our largest increase in followership, with 2,796 new followers added.





## TECHNOLOGY ADVANCEMENTS

Like the Wizard behind the curtain, managing the full cycle of NASFAA’s premier in-person and virtual events requires a suite of tools and technologies, and was the focus of our efforts last year. Built in phases, the management tool leverages NASFAA’s infrastructure to deliver a tool that allows staff to manage every component of show management — sessions, speakers, and scheduling, exhibit and sponsorship sales and placements, and content management — in the completely redesigned conference site components. This effort supports a variety of integration capabilities for partner efforts, such as our on-site registration process, event app, and exhibitor management.

Other technology efforts included:

- Integrated an e-reader platform for Self-Study Guides, books, and other electronic content
- Migrated to a cloud-based file management platform
- Conducted enhancements to the [NASFAA store](#) to facilitate efficient delivery of products, and refine registration processes to meet new requirements
- Implemented new site features for news delivery
- Supported the conclusion of the NASFAA Gives Back initiative

## NASFAA COMMUNITIES

Building an [online community](#) of financial aid professionals has been a remarkable journey, full of big, uplifting thoughts and positive affirmations. Our community is more than just a platform for sharing information; it is a place where people come together to support each other and make a difference in the lives of students and their families. Our community’s success is a testament to each member’s hard work, dedication, and commitment.

In 2022-23, NASFAA Communities achieved the following milestones:

- Established and launched NASFAA Communities, where hundreds of members collectively engage with each other and NASFAA on a weekly basis
- Integrated more than 1,500 members who participate in at least one community experience
- Launched 12 separate community experiences
- Hosted 25 community events to support a sense of belonging and community



# PROFESSIONAL DEVELOPMENT



The one constant for NASFAA members in the 2022-23 year was change. The implementation of the largest regulatory changes in 30 years began and ended with more questions than answers. Our members faced many starts and stops with regulatory implementation, with added confusion on timelines, the need to update systems and websites, and the challenge of communicating everything to current and prospective students. This was coupled with staffing shortages and retirements of long-term staff at many of our member institutions. The goal of Professional Development at NASFAA this past year was to meet our members where they are and offer opportunities that worked with their schedules and meet their training and development needs. Read more about what we accomplished in 2022-23 below.

## AskRegs

AskRegs is a mainstay for NASFAA members. The ability to find answers to regulatory questions or ask questions specific to school circumstances, without judgment, is valuable and a common activity for member schools. The implications of FAFSA simplification have seen this service grow, with 100 questions specific to this topic added from July 1, 2022 through June 30, 2023. We anticipate significant growth within this topic as we move through the current fiscal year.

The AskRegs Knowledgebase was viewed 1.6 million times over the last year, and over 15,000 questions were asked — with 57% of questions already populated for a quick answer.

## Top 5 Most Searched AskRegs Topics of 2022-23

- Application Process
- Direct Loans
- Cash Management
- Student Eligibility
- Verification

## NASFAA Webinars

The 2022-23 webinar series was very well received and had a significantly positive impact for attendees. This series, which consisted of at least monthly online events, was meticulously designed to engage, educate, and inspire our audience. Interactivity was a key feature, with live Q&A sessions and polls enhancing participant engagement. All webinars were recorded and made [accessible to our audience on demand](#), ensuring that the knowledge shared continued to benefit individuals long after the live events.

## Top 5 Webinar Topics by Attendance

- Verification
- The FAFSA
- SAP
- Eliminating Bias
- Homeless Youth

This year's average webinar attendance was 1,425 individuals per webinar, with an average participant satisfaction rate of 98.4%.

## NASFAA U Online Courses

NASFAA has created a well-structured and engaging educational option through the annual schedule for NASFAA U Online Courses. The use of an easy-to-navigate online course platform, interactive assessments, the flexibility to participate in live course meetings or instructor office hours, and clear communication make the NASFAA offering first in class among ways to prepare aid office staff on the regulatory requirements and practical applications needed in the administration of Title IV aid.

Every one of the 2022-23 NASFAA U online class offerings sold out. Additionally, all 12 topics received high satisfaction scores from participants, with an 89% class pass rate.

## Compliance Engine

NASFAA's Compliance Engine is made up of two products, the Self-Evaluation Checklists and the P&P Builder. These offerings complement each other and assist member institutions in ensuring they are operating in a compliant manner within the confines of Title IV administration. In the past year, members have created 2,605 P&P manuals with the P&P Builder and utilized the checklists in 2,708 instances to look at how well they have followed procedure.

## Top 5 Checklists Deployed in 2022-23

- Direct Loans
- Consumer Information
- Satisfactory Academic Progress
- COVID-19
- Cash Management

## NASFAA Self-Study Guides

NASFAA offers Self-Study Guides as a practical resource for Title IV aid administration. These guides are designed to help financial aid professionals enhance their knowledge and skills in various areas related to student financial aid administration.

The guides cover 16 regulatory topics and include assessment opportunities for individuals to gauge understanding.

In 2022-23, over 23,000 guides were downloaded, with Verification, Application Process, and Student Eligibility rounding out the top three most popular topics.

# CERTIFICATION & CREDENTIALS



## Certified Financial Aid Administrator® Program

The FAAC® designation validates competence in and commitment to effective and ethical financial aid administration among financial aid professionals at postsecondary institutions and related organizations nationwide, and recertification encourages continuous learning and professional development. By the end of this fiscal year, we reached the following benchmarks:

- Added 143 new FAACs
- Expanded the [Certification Registry](#) to 428 FAACs in all six regions and 48 states
- Achieved a [recertification](#) rate of nearly 80%
- Doubled [100+ Club](#) membership to include 99 FAACs who qualified for special benefits by having earned at least 100 points by the time they recertified

During the spring, beta tests of new certification exam preparation workshops developed by volunteer subject matter experts resulted in higher pass rates than for independent study, serving as proof of concept for next year's in-person workshops to be offered by regional and state associations and [online workshops](#) to be presented by NASFAA.

As the community of FAACs continues to grow, so do opportunities at conferences and in [Slack](#) for FAACs to connect and discuss solutions to challenges unique to financial aid.

Check the [Certification Registry](#) to see how many FAACs have earned the designation in each region and state.

## Number of FAACs by Region

Region	FAACs as of June 30, 2023	Percent change since June 30, 2021
SASFAA	123	58%
MASFAA	93	29%
EASFAA	76	49%
WASFAA	63	62%
RMASFAA	41	8%
SWASFAA	32	23%

## NASFAA Professional Credentials

NASFAA's Professional Credential program continues to grow as members earn new credentials and renew existing credentials. By the end of this fiscal year, more than:

- 33,530 credentials have been earned or renewed
- 9,670 professionals earned at least one credential
- 300 top credential earners earned all available NASFAA Professional Credentials

Combined with experience in the field, NASFAA credentials help ensure knowledge in each topic area is current and remains relevant, despite regulatory changes. Credentials also serve as excellent preparation for progressing toward becoming certified. Of the top credential earners, more than 80 now also hold the FAAC® designation awarded through NASFAA's Certified Financial Aid Administrator® Program.

## NASFAA BUSINESS SERVICES



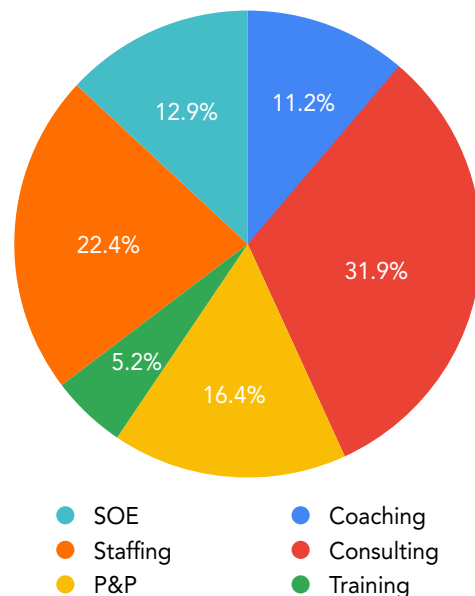
Blue Icon had another growth year, exceeding expectations. To accommodate the increase in inquiries and projects, we expanded our staff and streamlined many of our processes. We continued to hold "Let's Talk" monthly on topics of interest to the financial aid community, and introduced Policies and Procedures Group Coaching to help aid administrators get a jump start on their P&P manuals.

### Contract Volume

Of the 116 new contracts signed in 2022-23, general consulting remains the most popular project type, followed by interim leadership/staffing, and assistance with policies and procedures.

- 304 new inquiries received
- 244 new proposals produced
- 116 new contracts signed, including 14 for Standards of Excellence (SOE) reviews

Contracts Signed



## Consultants and Staff

The majority of Blue Icon's consultants are practicing financial aid administrators who apply their expertise via part-time consulting support. To inquire about becoming an independent consultant, visit the [Blue Icon careers page](#).

- 206 consultant applications received since Blue Icon launched
- 22 consultants added to our roster in 2022-23
- 95 total active consultants, including SOE peer reviewers

In addition to consultants, Blue Icon has welcomed several new staff members to the team:

- Joel Carstens, Project Manager (September 9, 2022)
- Kendra Allen, Project Manager (December 1, 2022)
- Mendy Schmerer, Compliance and Project Manager (July 24, 2023)
- Praacnaa Colestock, Operations Assistant (August 1, 2023)

## Group Coaching

Blue Icon held six group coaching opportunities in 2022-23, including the newly launched Policies & Procedures (P&P) Group Coaching, and every session sold out!

- New Directors: September 2022 and March 2023
- Aspiring Directors: October 2022 and April 2023
- P&Ps: January 2023 and June 2023

## Clean Audit

Blue Icon is proud to have submitted another clean third-party services audit report to the U.S. Department of Education.

- The audit requires collecting documentation for all engagements in which we perform Title IV financial aid functions on a school's behalf, such as interim staffing and writing policies and procedures.
- The audit firm reviews the documentation to ensure our actions are in compliance with Title IV federal student aid rules.

## DIVERSITY LEADERSHIP PROGRAM



NASFAA's award-winning Diversity Leadership Program (DLP) supports the association's [ongoing commitment to diversity and inclusion](#). Each year, up to six financial aid professionals from marginalized and underrepresented groups — one from each region — receive a portfolio of NASFAA benefits and support to help them grow as a financial aid association leader at the state, regional, and national levels.

DLP seeks to advance the careers of participants; help NASFAA and the regional associations develop a strong core of talented, motivated leaders from marginalized and underrepresented groups; and provide these individuals with support, access, and opportunities for leadership. The DLP Selection Committee chose the members of the 2022-23 class from among a field of 50 applicants. This year's DLP class had the opportunity to meet in person at both the 2023 Leadership & Legislative Conference & Expo in Washington, D.C. and at the 2023 National Conference in San Diego — the latter serving as a capstone to this professional development experience.

### 2022-23 DLP Participants

- [Naglaa Gaafar Rego](#), Coordinator of SAP Initiatives (Community College of Rhode Island)
- [Edgar Martinez](#), Compliance and Training Lead Officer (University of California, Los Angeles)
- [Brandi L. Miller](#), Assistant Director of New Student Programs (Drake University)
- [Nicolette \(Nicci\) Ratcliff](#), Senior Assistant Director for Federal Work Study and Compliance (Virginia Polytechnic Institute & State University)
- [Joy Thomas](#), Director of Student Financial Aid (Prairie View A&M University)

## NASFAA 2023 EVENTS AND AWARDS



### 2023 National Conference

The National Conference is NASFAA's premier event serving the student financial aid community. Financial aid professionals from across the nation arrive at the conference each year to increase their knowledge; network with colleagues; and learn the latest requirements, trends, and strategies in student aid.

Held June 29-July 2, 2023 in San Diego, California, NASFAA 2023 brought together 2,651 financial aid professionals from across the country — the highest attendance since 2017. What's more, over 1,000 participants were first-time conference attendees.

Lt. Colonel Olga Custodio, the first Latina U.S. military pilot, [kicked off the conference](#) with a keynote address that shared her story of success in a male-dominated field, despite receiving several rejections along the way.

"I found out that denial does not mean that it's never going to happen," Custodio said. "It's just a delay because you don't have the right experience or you're not in the right place or you don't have the education. But as long as you do not give up the possibility for an opportunity, it will always be there."

The conference also featured policy updates by NASFAA President Justin Draeger and Vice President of Public Policy and Federal Relations Karen McCarthy, a [pre-conference session on diversity](#), a ceremony to pass the gavel of leadership from 2022-23 National Chair Brad Barnett to 2023-24 National Chair Helen Faith, several U.S. Department of Education sessions on [FAFSA simplification](#), [U.S. Supreme Court cases](#), and more.

Online registration for the 2024 National Conference in Milwaukee, Wisconsin, opens in January 2024.

*"I learned so much! ... Thank you for reigniting my love for financial aid. It is easy to forget the 'WHY.'"*

*"Especially at a time of such change in our profession, it was so valuable to be in a community of my peers, learning together. ... No person and no financial aid office are an island, and to be able to take part in this conference with the wider financial aid community was such a valuable experience."*



## 2023 Awards

Each year, NASFAA awards recognize the outstanding achievements of members of the financial aid profession and higher education community. NASFAA's national chair and president announce award recipients each year during the National Conference. A special [press release](#), published after the awards ceremony, highlights each awardee.

NASFAA's 2023 [Lifetime Achievement Award](#), the highest honor which the association can bestow on a member, was awarded to:

- **Lisa Hopper**, dean of student financial services at National Park College
- **Karen Krause**, executive director for the Office of Financial Aid, Scholarships, and Veteran's Benefits Processing at University of Texas at Arlington
- **Lori Vedder**, interim vice provost of enrollment management & director of financial aid at the University of Michigan-Flint

The 2023 [Allan W. Purdy Distinguished Service Award](#), one of the highest awards that NASFAA bestows, was given to:

- **Brad Barnett, FAAC®**, associate vice president for access and enrollment management/director of financial aid and scholarships at James Madison University, and NASFAA's 2022-23 national chair
- **Roberta Johnson**, executive director of the Office of Student Financial Aid at Iowa State University

The 2023 [Meritorious Achievement Award](#), presented to an individual who has made either an important single contribution to NASFAA or the profession, or multiple significant contributions, was given to:

- **Youlonda Copeland-Morgan**, former vice provost of enrollment management at the University of California, Los Angeles
- **Pat Peppin**, student services director at Mesa Community College in Arizona

The 2023 [Robert P. Huff Golden Quill Award](#), presented each year to an individual, or organization, chosen for their contributions to the literature on student financial aid, was given to:

- **Steven McDowell**, associate vice president for financial aid services & Title IV compliance at Connecticut State Community Colleges, for his book, "Basic Guide to Financial Aid."

The association also presented six [Regional Leadership Awards](#) to recipients who have exhibited high integrity and character, have shown creative leadership, and have inspired and encouraged others to actively participate in professional development. One award was given in each of six regions to:

- **EASFAA – Thomas Dalton**, associate vice president of sales and marketing (Northeast), Edamerica
- **MASFAA – Chad Olson**, director of financial aid, Iowa State University
- **RNASFAA – Myra Pfannenstiel**, director of financial aid, Newman University
- **SASFAA – Marian Dill**, director of financial aid, Lee University
- **SWASFAA – Tricia Dubroc**, president & CEO, Louisiana Public Facilities Authority-Lela
- **WASFAA – Anthony Morrone**, associate vice president of student financial services, Nevada State University

## 2023 Leadership & Legislative Conference & Expo

Over 400 financial aid professionals — the largest number in the conference’s history — [convened](#) in Washington, D.C. in February for NASFAA’s Leadership & Legislative Conference & Expo to grow professionally, learn, network, and become a leader on their campus.

NASFAA President and CEO Justin Draeger asked the audience during the opening session to think about what issues related to financial aid keep them up at night. At the top of many attendees’ minds were issues related to FAFSA simplification, including the launch date for the 2024-25 FAFSA, which Department of Education officials [later confirmed](#) would not be released on October 1, as is typical.

The multi-day conference separated attendees into five different pathways where they were able to speak about issues with their peers, including building new skills to serve as state and regional association leaders, developing new strategies for compliance management, mastering enrollment management strategies using fiscal management and ethics, focusing on succession planning strategies, and networking and exploring important issues facing the financial aid community. Attendees also had the opportunity to meet with their representatives on Capitol Hill and discussed pressing student financial aid issues, including doubling the Pell Grant, FAFSA simplification, and eliminating student loan origination fees.

*“This is my favorite NASFAA event every year!”*

*“The knowledge I’ve gained from every session was incredible. I’m really glad I had the opportunity to attend this conference this year and listen to other leaders that can help us develop new and great ideas for our association.”*

## MEMBERSHIP



Despite the lingering impact of the COVID-19 pandemic, in fiscal year 2022-23 NASFAA maintained an impressive 97.7% member retention rate — well above the industry average of 85%.

That rate is a testament to NASFAA’s work delivering what members need, especially as member institutions dealt with implementing monumental changes as a result of FAFSA simplification.

In 2022-23, NASFAA also continued its upward trajectory of institutional members, posting the highest number since 2015-16 with 110 new and rejoined schools, to reach a total of 2,824. NASFAA’s Board of Directors held the dues rates steady yet again in 2022-23 to encourage new memberships and renewals.

Number of Students	Number of Schools	Percentage of Member Institutions
0-999	836	29.6%
1,000-4,999	1,292	45.8%
5,000-9,999	352	12.5%
10,000-19,999	196	6.9%
20,000 and above	148	5.2%
<b>TOTAL</b>	<b>2,824</b>	<b>100%</b>

Sector	Number of Schools	Percentage of Member Institutions
Community Colleges	869	30.8%
For-Profit	247	8.7%
Graduate/Professional	116	4.1%
Private, not-for-profit 4-year	1,083	38.3%
Public 4-year	509	18.0%
<b>TOTAL</b>	<b>2,824</b>	<b>100%</b>

## DALLAS MARTIN ENDOWMENT

### An Open Message From the 2023 DME Intern

*This year's intern, Abbie Barondess, arrived at NASFAA as a graduate student pursuing dual master's degrees in public policy at the University of Michigan's Ford School of Public Policy, as well as in higher education through the university's Center for the Study of Higher and Postsecondary Education. In this adapted excerpt from her [August 2023 message to NASFAA members](#), Abbie describes her five most significant experiences as this year's DME Intern.*



## Advocacy and Government Relations

One of my favorite experiences this summer was meeting with congressional offices. These meetings served as an opportunity to build relationships and introduce NASFAA's work and priorities to members of Congress, in addition to amplifying the voices of our members and the challenges they are facing on the ground. I attended weekly Committee for Education Funding (CEF) meetings where I learned about the federal budget process and education spending. These meetings were particularly timely and informative as drafts of the House and Senate Labor-HHS-Education appropriations bills were released.

## Policy Analysis and Legislative Tracking

One of the biggest learning curves for me at NASFAA was reading and analyzing legislative text. I had an informative training session with our senior policy analyst Jill Desjean, where I learned how to read and interpret legislative text, as well as the negotiated rulemaking process and how the Department of Education creates policy through regulations. I was able to put these skills to the test in producing our June and July legislative tracker, translating legislative text into easily understandable summaries.

## 2023 National Conference

Attending the national conference in San Diego was an integral part of my time at NASFAA, as it connected the work I was doing on the policy team to our members on the ground. It was a pleasure to meet so many of our members, who despite resource constraints and ever-changing policies, continue to serve their students with care and compassion. I was inspired by their dedication and loved hearing their stories about why they got into the financial aid profession. The big focus this year was FAFSA simplification, and preparing our members for the upcoming changes. Meanwhile, the U.S. Supreme Court decisions on race-conscious admissions policies and student loan forgiveness were released. Being in a room full of more than 2,000 financial aid administrators was surreal as we all tried to process the impacts these decisions would have on students, aid administrators, and higher education.

## Gainful Employment Blog

I am especially grateful for my supervisor Rachel, who encouraged me to further explore my areas of interest in the student aid space. One of those interests, higher education accountability, developed into a [blog series on Gainful Employment regulations](#). As a college adviser, I had seen many students take on debt to enter programs with little return on investment, or programs with a lack of transparency around what return on investment students could expect. Throughout the research and writing process, I came to understand the nuance of developing a higher education accountability framework that balances consumer protection and transparency with feasibility on the part of institutions.

## Final Reflections & What's Next

I am excited to use what I have learned at NASFAA in my second year of graduate school at the University of Michigan, particularly in my education policy and economic mobility class, which focuses on financial aid and accountability policy. I will be continuing my work at the Center for Education Design Evaluation, and Research, focusing on the evaluation of Michigan GEAR UP programs, and I am excited to bring the skills I gained in completing the National Profile to this work. My time at NASFAA has both reaffirmed my passion for financial aid policy and given me a better understanding of how member-based organizations influence policy. Thank you again to those who have contributed to the Dallas Martin Endowment and made this opportunity possible!

## Dallas Martin Endowment Donors

NASFAA is deeply grateful to all the generous donors to DME who have and continue to make the DME Internship Program and the NASFAA Diversity Leadership Program possible.

The following individuals contributed to DME in 2022-23:

### Gold Level: \$100 to \$499

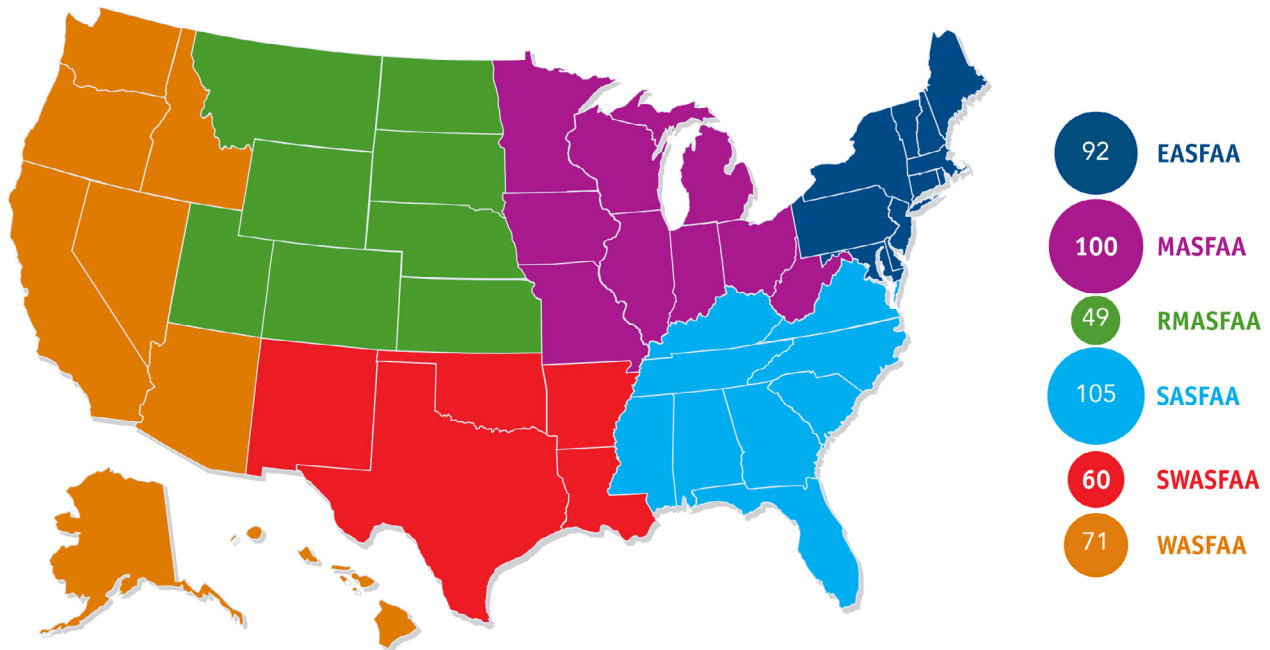
- Cecelia Dwyer

### Silver Level: Up to \$99

- Christina Ayres
- Heather Boutell
- Diahann Derrick
- Dawn Herrod
- Marisa Mezs
- Helen Ramirez
- Anafe Robinson
- Maria Sager
- Casey Trela

Visit [www.nasfaa.org/DME](http://www.nasfaa.org/DME) to lend your support!

## VOLUNTEERS



Despite the many challenges this past year presented financial aid professionals, NASFAA's volunteers selflessly shared their talent and time to support the mission of the association and its members. On the following page you will find a list of 2022-23 task forces, commissions, committees, boards, and working groups and their leaders, but there are so many more volunteers to honor. Please visit the [volunteer section](#) of our website to view a full list of NASFAA's 2022-23 volunteers.

### **Advancing the Profession Task Force**

Samantha Veeder, University of Rochester, Chair

### **Advocacy Pipeline**

NASFAA staff led

### **Association Governance Committee**

Brent Tener, Vanderbilt University, Chair

### **Awards Committee**

Brent Tener, Vanderbilt University, Chair

### **CFAA Program Commission**

Christina Tangalakis, Glendale Community College, Chair

Craig Slaughter, Kenyon College, Chair-Elect

Shannon Crossland, Frank Phillips College, Past Chair

### **Conference Mentor Task Force**

Brenda Burke, Kent State University, Chair

### **Conference Program Task Force**

Kristi Jovell, Middlebury College, Chair

### **Diversity Leadership Program (DLP) Mentors Group**

NASFAA staff led

### **Ethics Commission**

Mendy Schmerer, University of Oklahoma Health Sciences Center, Chair

### **Evaluating Stimulus Emergency Grants Working Group**

NASFAA staff led

### **Evaluating Federal Work-Study Task Force**

Celena Tulloss, University of Tennessee, Chair

### **Executive Leadership Task Force**

Rachelle Feldman, University of North Carolina at Chapel Hill, Chair

### **FAFSA Simplification Implementation Working Group**

Gail Holt, Amherst College, Chair

### **Financial Affairs Committee**

Kelly Morrissey, Community College of Rhode Island, Chair

### **Grad/Professional Liaison**

Joan Bailey, University of South Florida Health

### **Leadership & Legislative Conference - FAAC® Forum**

Christina Tangalakis, Glendale Community College, Chair

Craig Slaughter, Kenyon College, Incoming Chair

### **Leadership & Legislative Conference - Compliance Management Pathway**

Nicholas Prewett, Stony Brook University, Chair

Mark Diestler, University of Oregon, Incoming Chair

### **Leadership & Legislative Conference - Succession Planning Pathway**

Amy Cable, Louisiana Community and Technical College System, Chair

JoEllen Price, Houston Community College System District Office, Incoming Chair

### **Leadership & Legislative Conference Task Force - Strategic Enrollment Management Pathway**

Chuck Kneple, Portland State University, Chair

Billie Jo Hamilton, University of South Florida, Incoming Chair

### **NASFAA Associate Advisory Board**

Cecelia Dwyer, College Ave Student Loans, Chair

### **Nominations & Elections Committee**

Brent Tener, Vanderbilt University, Chair

### **Policy Rapid Response Network Task Force**

NASFAA staff led

### **Publications Editorial Board**

Linda Conard, LMC Communications Ltd., Chair

### **Resumption of Loan Repayment Task Force**

Anthony Jones, University of Utah, Chair

### **Selection Committee: Diversity Leadership Program**

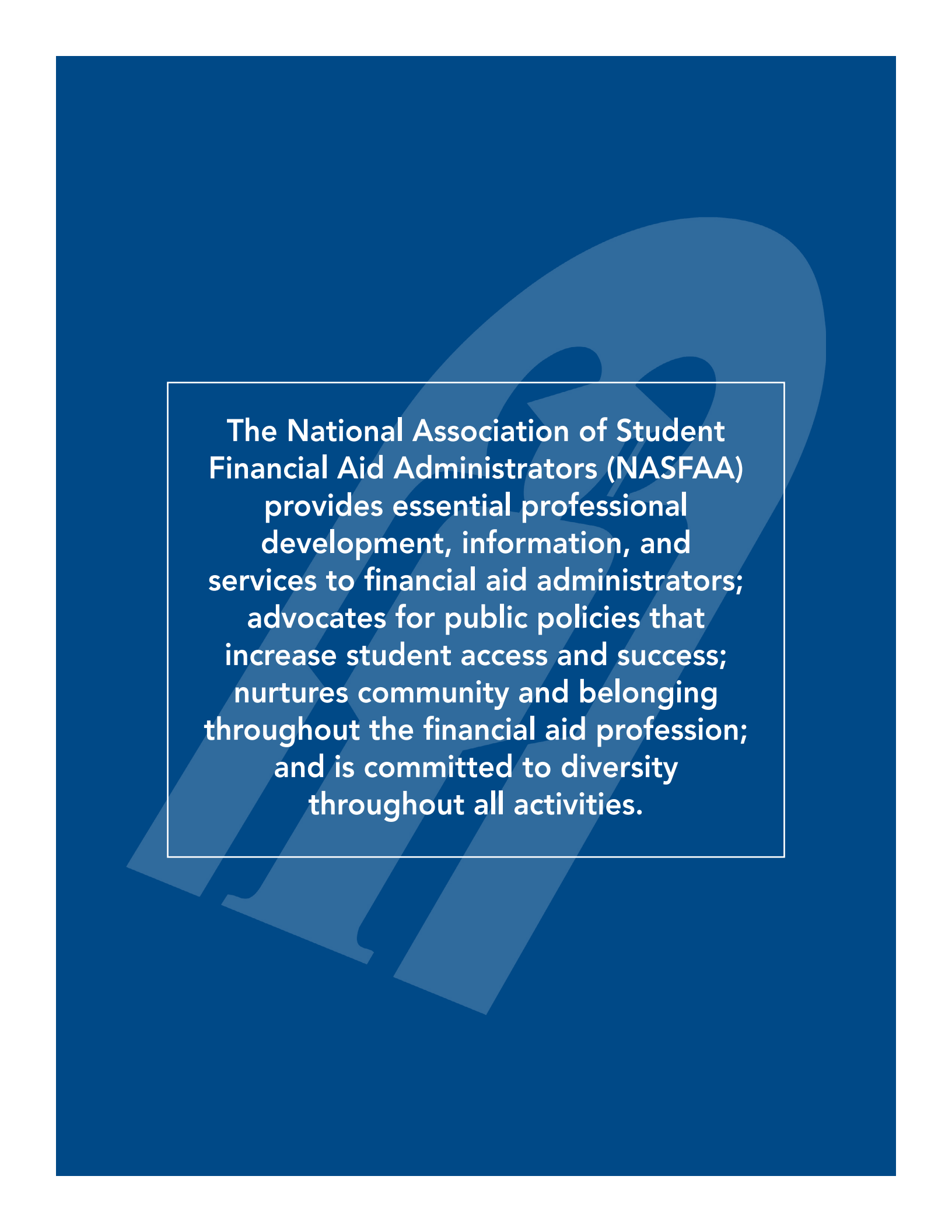
Derek Kindle, University of Wisconsin - Madison, Chair

### **Staffing and Benchmarking Task Force**

Justin Chase Brown, University of Nebraska - Lincoln, Chair

### **Test Development Volunteers**

NASFAA staff led



**The National Association of Student  
Financial Aid Administrators (NASFAA)  
provides essential professional  
development, information, and  
services to financial aid administrators;  
advocates for public policies that  
increase student access and success;  
nurtures community and belonging  
throughout the financial aid profession;  
and is committed to diversity  
throughout all activities.**