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SPECIAL POINTS OF INTEREST:

Federal Student Aid 2016 Training **1**
Interview with Fred Anderson
Chair, Risk Manager Committee **5**

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INSIDE THIS ISSUE:

USA Funds Grants	2
Secretary King's Bus Tour	3
NASFAA and Financial Literacy	4
Interview with Fred Anderson	5
HBCU Week	6
SE/MSURSD Contacts	6
Cluster Zone—N Carolina A&T	7
National Hispanic Heritage Month	8
Clergy Corner	9
FSA Webinar Series, p. 1	10
FSA Webinar Series, p. 2	11
Director's Message	12

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UNITED STATES DEPARTMENT OF EDUCATION

CUSTOMER EXPERIENCE | SCHOOL EXPERIENCE



FSA TRAINING CONFERENCE

for Financial Aid Professionals

November 29 - December 2, 2016

Georgia World Congress Center

285 Andrew Young International
Boulevard, Atlanta, GA

The *FSA Training Conference for Financial Aid Professionals* is the largest training program in the United States serving the financial aid community, and ultimately the students and families seeking an education beyond high school. The FSA Training Conference is not for government employees, but it is training for financial aid professionals by the government for those schools/institutions receiving Title IV funds.

Did You Know?

FSA is a part of the U.S. Department of Education and is the largest provider of college and career school student financial aid in the nation.

FSA is the largest provider of student

financial aid in the nation, providing billions each year in grants, loans, and work-study funds to students attending college or career schools. In Fiscal Year 2015, FSA delivered more than \$128 billion in aid to almost 12 million students at more than 6,100 schools. FSA also manages and oversees a loan portfolio in excess of \$1.2 trillion in outstanding loans, representing more than 193 million student loans to approximately 42 million borrowers.

World-wide annually, approximately 6,000 financial aid professionals attend this free training to learn more about federal regulations and new legislation passed by Congress, gain hands-on experience using the student loan data systems, interact with federal subject matter experts, and network with peers and colleagues to share industry best practices. For more information, click this [link provided.](#)

USA Funds Awards 2.3 Million to Promote Minority Student Success*

INDIANAPOLIS — [USA Funds](#)[®] has awarded grants totaling nearly \$2.3 million for the development and application of data tools and institutional practices that enhance the college completion rates and career readiness of first-generation, low-income and minority students. The three-year MSI Measuring College Value initiative is designed to support two-year and four-year minority-serving colleges and universities in measuring the value of their programs, improving student outcomes, and developing innovative approaches that inform the broader postsecondary education community of ways to increase program completion and advance the career readiness of their students. USA Funds has awarded grants to the following seven colleges and universities, through a competitive process, which included a review of their proposals by outside evaluators:

Harris-Stowe State University, St. Louis, Missouri. The university will involve students more directly in the assessment of their academic and personal progress toward degree attainment and gainful employment.

Martin University, Indianapolis. The university will enhance and expand its Liberal Arts Plus model, to promote a hybrid blend of skills acquired in vocational programs, focused workforce preparation and a well-rounded liberal arts education.

Miami Dade College, Florida. The college will develop and integrate four user-friendly data-based tools to promote student success throughout students' academic life cycles and to ensure the curriculum is aligned with employer needs.

St. Thomas University, Miami Gardens, Florida. The university plans to provide a cohort of entering students with four years of career-oriented education and training, an individualized plan to foster college completion and career readiness, and the support of a professional coach and mentor.

Salish Kootenai College, Pablo, Montana. The college will develop data tools aligned with the American Indian perspective, to assess college readiness, academic progress and workforce outcomes.

Texas A&M University, Corpus Christi. The university will enhance its existing connections with employers with tools that monitor alumni performance and satisfaction in the workplace.

Wiley College, Marshall, Texas. The college will integrate data to track and intervene strategically to promote early college success, persistence, completion and meaningful employment outcomes of graduates.

"As college completion rates and employment outcomes for black, Hispanic and Native American students continue to lag, these colleges are well-positioned to improve these results, applying data-informed solutions to enhance the value they deliver to students," said Lorenzo L. Esters, USA Funds vice president, philanthropy. "If our nation is to continue to prosper, all segments of our population must be equipped with the skills to participate fully in the workforce and in the communities in which they live."

As part of the initiative, each school will benefit from a designated "data coach," who will assist the institution in the creation of user-friendly, customized data tools. Each institution also will designate an "innovation group," to include its chief academic affairs officer, an institutional research staff member, a faculty representative, and one employer-partner. These innovation groups will participate in an annual meeting to share best practices and foster collaboration between leadership and faculty among the seven participating colleges and universities.

"Throughout its history, USA Funds has worked to enhance higher education opportunities and success for students of color, lower-income students, and those who were the first in their family to attend college," said William D. Hansen, USA Funds president and CEO. "Building on that legacy, these grants will promote a surer path toward a college degree and a smoother transition to successful careers and fulfilling lives for minority students."

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Opportunity Across America Schools 2016 Bus Tour



The wheels on the bus have been turning for nearly 20 years as US Department of Education secretaries have celebrated back-to-school with visits to schools across the country. Themes have ranged from "America Goes Back to School," during the Richard Riley years, to Spellings' "No Child Left Behind," to Arne Duncan's "Courage" and "Investing in Our Future," and now Secretary John King's "Opportunity Across America." You may want to watch this video about [opportunity](#) in America.

Akilah Johnson—a sophomore at Eastern Senior High School in Northeast Washington, D.C.— joined the kick-off! Her doodles are really cool—so cool that she was a winner in Google's national "**Doodle 4 Google**" contest. To get the bus rolling, and inspire other doodlers along the route, Johnson drew one of her famous doodles on the side of the back-to-school bus.



On the tour, **Secretary John King** highlighted the progress the Department made toward improving education over the past seven and a half years; reached out to teachers, students, and parents; and along the way, developed new partnerships and motivated people to participate and engage in our work. They visited exemplary Pre K-12 schools and institutions of higher education, and celebrated local ideas and initiatives that support all students.

MEMPHIS TENNESSEE STOPOVER.

Richard Blazen of the Awareness and Outreach Division represented **Fred Stennis** and Customer Experience, Federal Student Aid (FSA) on this leg of the tour, and Richard described the experience.

"FSA worked hand-in-hand with Secretary King's 'Opportunity Across America' September 14, 2016 bus tour. I assisted with a college fair at **Craigmont High School** in Memphis, Tennessee. The fair attracted hundreds of



students. Participants asked many in-depth financial aid questions and were provided answers.

"As the excitement continued, further assistance was provided by Secretary King as he gave a live demonstration showcasing an important college resource, [College Scorecard](#). This tool provides students and families reliable data that has been designed to help families make informed decisions regarding which institutions are a good fit for their children. The official website is <https://collegescorecard.ed.gov/1>

"My day ended by providing free publications and a comprehensive presentation to hundreds of students in a separate auditorium. The presentation centered on financial aid basics, as well FSA's tools and resources and a walkthrough of the official FSA website, <https://studentaid.ed.gov>."

For more detailed information about specific schools and communication tools related to the topics covered on the tour, see the [Press Release](#). **Cynthia Dorfman**, OCO (Office of Communications and Outreach) is the contact.

NASFAA Shows Support of Financial Literacy

On September 14, 2016, **NASFAA** (National Association of Student Financial Aid Administrators) hosted a well-attended National Summit on Collegiate Financial Wellness (NSCFW) webinar focused on building financial wellness programs on college campuses. **Bryan Ashton**, Texas Guaranteed Student Loan Corporation (TG) Director of Student and Institutional Success, and **Phil Schuman**, Indiana University Director of Financial Literacy presented a session that allowed attendees to learn about some of the best practices of higher education financial wellness programs and how financial aid professionals can grow programs at their respective institutions.



The session began with discussions on the impact that finances have on students. Research shows that more and more students have financial situations that hurt their ability to purchase required materials for class, participate in campus activities, and feel as though their finances are impacting their academic performance. In addition, students are working more hours in order to make ends meet. However, students working these extra hours increase the odds of delaying graduation and/or having a lower grade point average. The bottom line is that student finances are interfering with students' chances for success in school.

Given the research that is emerging, the presenters drew a connection between student financial wellness and student success planning. The data supports the argument that student finances are a primary piece of the student success puzzle, but very often student success planning on campus happens without recognition of this fact (or more directly without the Financial Aid Office's involvement). Recommendations were presented to make student finances a true campus-wide issue and to develop buy-in to move the topic to the forefront of campus-wide retention planning.

After discussing how to foster the growth of a financial wellness program, specific examples of initiatives driven by financial aid offices were discussed:

Indiana University implemented the Student Debt letter sent to each student during the school year indicating how much they have borrowed to that point in their academic career and their projected repayments.

Cuyahoga Community College implemented "Project Go" program where trained students provide assistance to other students in linking them with community agencies that can provide resources (e.g., child care, food, etc.) that could be perceived as a barrier to completion.

The University of California Berkeley implemented "Bears for Financial Success," a peer-to-peer program that partners trained students with other students seeking answers to their own personal finance questions.

Northeastern University implemented a Center for Financial Independence and their student-driven "Thrive" program that provides grants to students and student organizations looking to create a financial wellness-related initiative on campus.

The Ohio State University worked to incorporate financial education and coaching into functions of their student experiences, including the process of applying for emergency aid and supporting students that have fallen behind on their payment plans.

For those looking to start or enhance an existing financial wellness program, the National Summit on Collegiate Financial Wellness provided a venue for institutions to learn from other programs on successful financial wellness implementation techniques. In its three years of existence, the Summit has grown from 160 attendees from 110 institutions, to 280 attendees from over 160 institutions, indicating that the field of higher education financial wellness is growing. The 2017 Summit is being planned and an announcement will be made shortly about details. If you are interested in learning more, please visit www.nscfw.org or e-mail summit@nscfw.org.

An
Interview
with
Fred
Anderson,
Chair, Risk
Management
Committee
by
Jacqueline
Daughtry-
Miller



"I believe in
education
for life!"

"An
important
mission is
my being
able to see
change so
that people
are
comfortable
with
change."

—Fred
Anderson

Fred Anderson chairs the Risk Management Committee and is the Senior Adviser, Risk Assessment for Federal Student Aid (FSA) at the Department of Education. How interesting it is that we highlight Fred Anderson during the first weeks of the opening of the National Museum of African American History and Culture. He is a man who has achieved many firsts as a trailblazer in the field of risk management and financial governance. Fred credits his parents and many mentors with his success. At an early age, his family instilled and focused on personal values, religion, community service, and respect for the elderly. He was inspired by the memorable stories they shared with him about family and the nation's rich Black history.



Fred was born in Barnwell County, South Carolina, which was the home of the hydrogen bomb. It was due to nuclear weapons production that his family left the area and moved to other states.

His path to achievement began early in his life and during high school when he was class president for three years and valedictorian of his graduating class. He continued his education at Hampton University, an HBCU in Virginia, where he received a Bachelor's degree in accounting with honors. He currently serves in a non-fiduciary role on the Hampton University President's Advisory Council which supports the President in strategic issues such as capital expansion. Fred indicated that he has "always liked business and seeing how it works."

As a Public Certified Accountant and Certified Internal Auditor, Fred's first job was as a Senior Manager with Arthur Andersen in Washington, DC. He spent more than 13 years at the well-known firm as the first Black senior executive. He left the company in 1986 to join the Mellon conglomerate where he spent the next ten years as East Regional Chief Auditor. While at Mellon, he spent significant time as a merger and integration internal consultant. For nearly two years, Fred served as Senior Vice President of Bank of America. He spent over 10 years at Wachovia Corporation where he was responsible for the wide integration of the company's financial controls model for the execution of all financial transactions under their newly evolving risk management framework.

A standout in his field, Fred is in demand because of his dedication to excellence and is sought out for his skills and attention to details. Some of his notable "firsts" include conducting the first-ever audit of the District of Columbia Public Schools. Fred worked to produce the federal government's required first audit of the Martin Luther King, Jr. Federal Holiday Commission.

Fred is proud of his membership with a number of professional, not-for-profit civic organizations, including the **National Association for Black Accountants, Inc.** He has served on several boards, including the United Way, Homemaker Health Aide Service of the National Capital Region, Goodwill of America, and the Alzheimer's Board in Pittsburgh. In his spare time, he likes spending time with family and mentoring at-risk youth.

Fred continues to showcase his abilities in his current position and will continue to help creating opportunities in higher education for our citizenry. Along with the current FSA Chief Risk Officer, he recently co-authored a section of the publication, "Managing Risk and Performance: A Guide for Government Decision Makers" on the implementation of Enterprise Risk Management (ERM) at the Office of Federal Student Aid, U.S. Department of Education. The publication documents FSA's journey in implementing the first formalized ERM system.

National HBCU Week Conference

The Annual National Historically Black Colleges and Universities (HBCUs) Week Conference, “HBCUs: Promoting Excellence, Innovation & Sustainability” was held **October 23-25, 2016** at Renaissance Arlington Capitol View, Arlington, Virginia. The conference was planned under the leadership of the White House Initiative on HBCUs with input from the President’s Board of Advisors on HBCUs and conference sponsors. It provided a forum to exchange information and share innovations among and between institutions and stakeholders, which included: federal agencies, private sector companies and philanthropic organizations to provide an overview of successful engagements, that if replicated, could improve instruction, degree completion and the understanding of federal policies that shape and support higher education.



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CLUSTER ZONE

Each quarter, MSURSD will feature a column called **Cluster Zone**. This quarter, we will feature a **Historically Black College and University** and provide updates and articles of interest. If you have an idea or topic that you would like to see, please contact Jacqueline.Daughtry@ed.gov. The schedule of future cluster group spotlights follow: **HBCUs** will be in the fall 2016 issue; **Hispanic-Serving Institutions (HSIs)** will be featured in the winter 2016 issue; **Predominantly Black Institutions (PBIs)** will be featured in the spring 2017 issue; **Tribal Colleges and Universities (TCUs)** will be featured in the summer 2017 issue and **Asian American and Native American Pacific Islander-Serving and Alaska Native/Alaska Native and Native Hawaiian-Serving Institutions (ANNAPISIs/ANNHs)** will be featured next fall. Please be on the look out for these Cluster zone articles.

MSURSD Salutes North Carolina A&T State University



North Carolina Agriculture and Technical State University celebrates 125 years as an academic community that was founded as a land-grant institution. Established in 1891, the school sits on 200 beautiful acres in Greensboro, North Carolina. Known as the Aggies, school enrollment is more than 10,000 students and employs more than 2,000 personnel. President Barack Obama recently visited the campus, as well as First Lady Michelle Obama. A proud Aggie photographed

President Obama riding through the campus following his town hall discussion at the school in October.

NCA&T strives for excellence and innovation in its curriculum. In a July 2016 school listing, **MONEY Magazine** ranked North Carolina A&T as the best value of historically black colleges and universities in the nation. **FORBES 2016 Best Value Colleges** screened 2,000 four-year colleges and universities to determine which had the most value. Of the 705 universities ranked, NC A&T was ranked #190 overall, making it **#7** in North Carolina and **#4** in the University of North Carolina System. NCA&T has also proven to be an outstanding administrator of Federal Title IV Financial Aid Programs. Our hats go off to Chancellor **Harold L. Martin, Sr.**, and Financial Aid Director **Sherri Avant** and her staff, who provide efficient delivery of aid to students while ensuring the institution's compliance with regulations.



NATIONAL HISPANIC HERITAGE MONTH AT TEXAS COLLEGE



Texas College in Tyler, Texas celebrated National Hispanic Heritage Month on September 22. Director of Financial Aid **Angela R. Marshall** requested **Raúl Galván** MSURSD-Dallas, to present financial aid information at this historic outreach Financial Literacy workshop, “Bridging the Gap, Helping Hispanic Students Fund their College Education”.

The workshop reached out to assist the Hispanic student population to successfully complete the FAFSA application, address questions and concerns regarding unique situations, and understanding Federal Student Aid requirements. It was held in Spanish to aid in removing language barriers from students with limited English proficiency.

Guided Pathways: A Redesign of the Community College System

One of the most talked about projects at community colleges today is the advent of pathway models. Community colleges have attempted numerous approaches to change over the past several decades and while there have been significant attempts, the outcomes have not always been as successful as desired. The Pathways model approach appears to be somewhat different, in that it is not developed similarly as the normally smaller pilot programs.



The Pathway model is an integrated, institution-wide approach to student success. Whether we are talking about career or guided pathways, the idea behind the process is that the design is more of a clear, intentional, coherent structured educational experience. The aim is that students, at whatever time they enter their education or career entry point, would ultimately be able to attain a higher quality postsecondary educational credential that would allow for a successful career and employment in the labor market.

By establishing a guided pathway, each individual student would be guided effectively and efficiently from their point of entry to a valued career in the labor market.

In order for Pathways to work, the model must provide clear and concise program maps that include specific course sequences, learning outcomes, progress monitoring, and a guided academic and career pathways at scale.

One such project has become a shared commitment in which 30 Community colleges have agreed to participate. The initiative is entitled the Pathways Project. This project is being led by the American Association of Community Colleges (AACC) and has received \$5.2 million in pilot funding from the Bill and Melinda Gates foundation. There are several other grant partners, including groups such as Achieving the Dream and The Aspen Institute. The project is touting a full redesign of the community college at scale and began this work in July 2016. The project will continue through 2018 with a follow up report.

From the website <http://www.aacc.nche.edu>

THE JEANNE CLERY ACT CORNER



CLERY ACT: Violence Against Women Act

By Keith Ninemire, Institution Review Specialist, Clery Team

Providing Victims A Written Explanation of their Rights

VAWA and the regulations require that the institutions provide students or employees who report being victims of dating violence, domestic abuse, sexual assault or stalking with a **written explanation** of their rights and options, regardless of whether the offense occurred on campus, including **written notification** of:

- Counseling
- Health
- Mental health
- Victim advocacy
- Legal assistance
- Visa and immigration assistance
- Student financial aid
- Other services available for victims both within the institution and in the community, and the availability of changes to:
 - o Academic
 - o Living
 - o Transportation
 - o Working situations
 - o Protective measures regardless of whether the victim reports to law enforcement



The institution must also provide the range of protective measures that the institution offers following an allegation of dating violence, domestic violence, sexual assault or stalking. Make sure that your institution has prepared a handout to give to these victims when they report one of the identified allegations above.

For additional information regarding this topic, please review chapter 8-17 in the Handbook for Campus Safety and Security Reporting at: <http://www2.ed.gov/admins/lead/safety/handbook.pdf>. The regulations governing the Clery Act can be found at 34 C.F.R. §§ 668.14, 668.41, 668.46, and 668.49.

Federal Student Aid Webinars

Space is limited so
REGISTER TODAY!



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Online registration is available at <http://fsaregistration.ed.gov/d/4vqwpf>

WEBINAR TITLE	DATE & TIME	RECOMMENDED FOR	DESCRIPTION
Understanding Student Loan Repayment	Thursday, November 17 4 p.m.–5 p.m. ET	Borrowers (current and previous)	We will discuss all of the options to repay your federal student loans and the various repayment plans.
Parents & Students: Preparing for College 101 (ENGLISH)	Tuesday, November 22 3 p.m.–4 p.m. ET	Students and parents	We will cover the five primary sections of StudentAid.gov: <i>Prepare for College</i> , <i>Types of Aid</i> , <i>Who Gets Aid</i> , <i>FAFSA: Applying for Aid</i> , and <i>How to Repay Your Loans</i> (in English). Parents and students, this is a great resource for you.
Parents & Students: Preparing for College 101 (SPANISH)	Tuesday, November 22 5 p.m.–6 p.m. ET	Students and parents	We will cover the five primary sections of StudentAid.gov: <i>Prepare for College</i> , <i>Types of Aid</i> , <i>Who Gets Aid</i> , <i>FAFSA: Applying for Aid</i> , and <i>How to Repay Your Loans</i> (in Spanish). Parents and students, this is a great resource for you.
FAFSA Demo Line-by-Line	Wednesday, November 30 5 p.m.–6 p.m. ET	Students and parents, college access professionals	We will guide you through the 2017–18 FAFSA® and discuss updates to the application.
Public Service Loan Forgiveness (PSLF)	Thursday, December 1 5 p.m.–6 p.m. ET	College access professionals, borrowers (current and previous)	We will discuss the criteria for PSLF and provide information on the loan forgiveness process.
College Access Professionals: Tools & Resources	Tuesday, December 6 2 p.m.–3 p.m. ET	College access professionals	We will cover the four primary sections of FinancialAidToolkit.ed.gov: <i>Learn About Financial Aid</i> , <i>Conduct Outreach</i> , <i>Get Training</i> , and <i>Search Financial Aid Tools and Resources</i> . College access professionals, this is a great resource for you.

WEBINAR TITLE	DATE & TIME	RECOMMENDED FOR	DESCRIPTION
Am I Dependent or Independent on the FAFSA?	Tuesday, December 13 4 p.m.–5 p.m. ET	Students and parents	We will discuss how to determine if you are dependent or independent, which parent to report on the FAFSA, and details regarding special circumstances.
FAFSA Demo Line-by-Line	Thursday, December 15 5 p.m.–6 p.m. ET	Students, parents and college access professionals	We will guide you through the 2017–18 FAFSA® and discuss updates to the application.
Financial Knowledge for College	Tuesday, January 10 4 p.m.–4:30 p.m. ET	Students, parents and college access professionals	We will discuss how to handle financial decisions that can have a lifelong impact on students. We will also discuss some key financial decisions faced by student loan borrowers and resources to help them make well informed choices.
Financial Aid 101: Getting Ready for College	Tuesday, January 17 5 p.m.–6 p.m. ET	Students, parents and college access professionals	We will provide information about federal student aid programs, how and when to apply for the <i>Free Application for Federal Student Aid</i> (FAFSA), as well as policy updates including information about FSA ID and the 2017–18 FAFSA.
Get Your Questions Answered	Tuesday, January 24 5 p.m.–6 p.m. ET	Students, parents and college access professionals	We will provide information to dispel myths about financial aid. We will also have our Question & Answer Chat Forum open so you can send us your questions!
Homeless/Foster Youth and Financial Aid	Tuesday, January 31 3 p.m.–4 p.m. ET	Students, parents and college access professionals	We will provide information for homeless students and foster youth to assist with completing the FAFSA and helping with the financial aid process.

Federal Student Aid Webinars



Message from the Director of the Minority-Serving and Under-Resourced Schools Division



And just like that, Summer surrendered to Fall! The leaves are falling and the air is crisp. We hope that you had a successful school opening. The students are getting settled in and the football season for many is well underway. We know this is a busy time of the year for you and your staff, as you complete the FISAP and begin processing for the Early FAFSA.

In Fall 2015, President Obama announced two major changes to the Free Application for Federal Student Aid (FAFSA) process. While traditionally the FAFSA filing cycle begins on January 1 of the year preceding the award/academic year (i.e., January 1, 2016, for the 2016-2017 award/academic year), beginning with the 2017-2018 FAFSA cycle, the application became available to students and their families three months earlier on October 1 (i.e., October 1, 2016, for the 2017-2018 award/academic year).

The second change announced is that, again beginning with the 2017-2018 cycle, the FAFSA is collecting income information from the tax/calendar year one year earlier than has been used in the past. Thus for the **2017-2018 FAFSA**, students and families will provide information from calendar year **2015** and not from calendar year 2016. Because of this, almost all tax return filers are able to electronically transfer their tax information directly into their FAFSA by using the IRS Data Retrieval Tool (DRT).

In preparation for the 2017-2018 FAFSA, we have developed and will continue to update resources that can help support postsecondary institution's outreach to students and families. We have posted a document titled [Federal Student Aid Resources for the 2017-2018 FAFSA](#) on the [Financial Aid Tool website](#). The PDF provides the full list of FAFSA-related resources that are either currently available, or the timing for when they will become available. Additionally, the Department has developed a page that provides the most updated information pertaining to the 2017-2018 Early FAFSA. You may submit questions or comments to earlyfafsafeedback@ed.gov. We hope these resources are helpful.

We would like to thank all participants who attended our annual Spring/Summer workshops. Your presence together with your active contributions, feedback, and ideas was greatly appreciated. We would also like to extend special thanks to our hosts and speakers, who collectively worked to provide a better understanding of our latest policies and procedures.

Our next training event is the 2016 FSA Training Conference for Financial Aid Professionals. [Registration is now open](#). The conference will be held on Tuesday, November 29 through Friday, December 2, 2016, at the Georgia World Congress Center in Atlanta, Georgia. We look forward to seeing you there!

We hope that this newsletter will provide needed information about events and issues of concern to you and your institution. You may request information and/or send comments directly to me or our editorial staff. Please enjoy the newsletter and have a great Fall!

Sincerely,

Marcia Boyd, Ed.D.

Director, Minority-Serving and Under-Resourced Schools Division

Federal Student Aid (FSA) VISION STATEMENT

To be the most trusted and reliable
source of student financial aid,
information and services in the nation.

Federal Student Aid | School Experience Group
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