

Scholarship Administrators Meeting Minutes

mlc

February 14, 2018

1. Introductions- welcome

2. Marcy Joseph – U of MN Foundation – Sr Stewardship Specialist
Appreciates and thankful for the scholarship administrators' and their important role in stewarding the U's scholarship donors! Reporting from Fall 2017:

2,545 households received the Report on Endowments

We reported to these households on 2,604 different funds

Of those 2,604 funds, 2,000 were student support funds.

Of those 2,000 student support funds, we were able to provide names of 2017-18 fall recipients for 1,405 (70%)

Of 30% that did not show fall recipients, we believe that most were graduate fellowships, study abroad, late offers, etc. That said, there could be some that weren't awarded for other reasons.

3. Admissions Update – Jenny Malek

- a. **National Scholars** – reminder of new annual waiver set dollar amounts:

\$2,500/\$5,000/\$10,000 started fall 17.

There are still students attending who are getting the Gold (full tuition differential funded) and National Excellence (half of the tuition differential covered) waivers for admissions prior to fall '17 that will continue.

- b. Currently there are approx. 18, 000 offers of admissions with over 5,000 scholarships awarded.

4. Financial Aid Update – Michelle, Nate

- a. **18-19 Processing – timeline – deadlines**

- i. Freshman estimated financial awards expected to be sent out end of February
- ii. Due to Department of Education algorithm changes the number of students selected for verification is significantly higher this year – encourage students to check their MyU for items they must complete.
- iii. June 30th deadline for entering scholarships to ensure they show up on the first award notifications for fall 18.

- b. **Earlier summer registration reminder – Year Round Pell**

- i. Thursday March 1, 2018 = start of summer registration for degree-seeking students. A week later, March 8 = open registration. Moved from early April. Approved by the college deans. Hope is to boost summer enrollment, align ourselves with other colleges and some of the U of M system campuses.
- ii. YRP = Year Round Pell – eligible students will be awarded a Pell grant for summer enrollment provided they are at least half-time and fit other criteria. This means there are additional Pell grant funds available if a student has used 100% of their annual award. Suggestion from group was to advertise to students that this is available to encourage registration versus only awarding if they are enrolled. Michelle will pass this idea along.

- c. **A133 Audit results**
 - i. Called the single audit now.
 - ii. Completed in December. No findings for the school. This is University wide audit of federal funds received.
- d. **Internal Audit of schools & colleges for scholarships and fellowships**
 - i. They are looking at the how the offices are following their written criteria, use of funds and what isn't being spent. Consistency across colleges. OSF has shared a list of those units using the on-line scholarship application.
 - ii. Be sure to have some kind of policy/procedure to go with your scholarship('s)

5. Scholarship Update

- a. **Privacy- sharing of student aid information**
 - i. The scholarship office is happy to help you navigate this current gray area as it relates to sharing student financial aid information and data. Just give us a call. If you could share this change with others in your department and college that would be appreciated.
 - ii. From the website: <https://onestop.umn.edu/finances/scholarships>

Requests for your financial aid information

The University of Minnesota is unable to share information from your financial aid data or Free Application for Federal Student Aid (FAFSA) with anyone other than you (even with your permission) due to the U.S. Department of Education's increased regulatory focus on student data privacy.

Requests for your financial aid data or FAFSA information will be submitted to One Stop Student Services and provided to you to forward to the requesting party. A how-to guide on [how to view your financial aid](#) is available online. If you need further assistance, please [contact One Stop](#).

- iii. *From a semi-final draft document in OSF updated January 2018 – specifically page 9 references outside non-state scholarship organizations.*

Overview:

Implementation of the Department of Education's Privacy and Technical Assistance Center (PTAC) [ptac.ed.gov] new interpretation of [data sharing](#) by financial aid offices. Let students, staff and outside entities know about this change.

https://studentprivacy.ed.gov/sites/default/files/resource_document/file/FSA_final_0.pdf



NASFAA Urges ED to Resolve & Issue Privacy Guidance Quickly

November 17, 2017 | Published by NASFAA | Letter

NASFAA, along with several partner organizations, sent a letter to the Department of Education (ED) about verbal guidance given by ED's Privacy and Technical Assistance Center (PTAC) that has upended many years of common practice.

https://www.nasfaa.org/uploads/documents/NASFAA_PTAC_Data_Sharing_Letter.pdf I'm hoping this link works for non-NASFAA members as well since this is a letter to the Dept. of Education

NASFAA verbally confirmed with PTAC that section 483(a)(3)(E) of the Higher Education Act indicates that information collected on the FAFSA and its results like EFC and subsequent awards can only be used for the administration of aid awarded under federal student aid programs, state aid, or aid awarded by eligible institutions.

What this means is that even with the student's permission the school cannot share FAFSA, etc. information with entities such as outside scholarship organizations that routinely require information regarding EFC, unmet need and aid packages. This is a considerable change from current practice. Both NASFAA and a number of other organizations and professionals across the spectrum of higher education have requested some method of accommodation to facilitate long-standing practices of gaining student permission to share data.

Effective: implementing Spring 2018 at U of MN

Touch points / Where {Twin Cities in this case}{aid offices at other campuses identify their own}:
One Stop website = consumer information - post information for students

One Stop staff = what the change is, what is the business process {how to receive the information from the student, submit to OSF for completion, who they direct questions/concerns to}

Scholarship Unit = clearinghouse of information, form completion, outreach/response to scholarship donor & student inquiry, receive/retain copies of completed documents for imaging and tracking

Students=send response letter/phone call/email ; be clear about process {we return completed form to student to then submit to scholarship agency- your discretion about method except if email use official university email accounts}

Third parties= send response letter/phone call/email. Some organizations may not be familiar with the change in interpretation. A significant number of schools in the country are taking this conservative approach pending further written clarification.

University schools, colleges, dept.'s= need to be informed about the change and what it means for them. Expectation is that for university scholarships proper it can be business as usual. But if individual student information is provided to a third party outside of the university then caution is needed and it is likely not acceptable to share financial aid data beyond what is accepted directory information. Departments can collect student permission to share with donors recipients of scholarships for example.

b. Priorities established for STAR for current year – Natalie Ysker

After estimating the number of hours to fix/enhance the performance reports, these items will be completed this fiscal year (goal by end of June):

- Upgrade the look and feel of user interface
- Link funding source to STAR for easy maintenance of issues
- Ability to sort results by all columns
- Add committed amount column
- Disbursed according to plan report: clarify date range (1/2 vs full disbursement)
- Eliminate duplicates displaying
- Also, if there is time, look into a way to implement an optional filter for 4444444444444 item types

6. Other? Thoughts to ponder from Michelle for our next meeting

Hypothetically – what would it look like (pros and cons) for your office (scholarships) if continuing students were to be awarded, perhaps with estimated awards, earlier in the spring rather than July/August? This would be before the Board of Regents meet and set tuition in July.

How helpful do you think it would be to have some standardized budgets/cost of attendance figures on the website for estimated costs for the next year? So, in the spring estimated costs of attendance for general kinds of categories like undergraduate, graduate students, etc. would be visible to all.

Great handouts on retention rates and who leaves the U you might find interesting from Orientation & First Year Programs. Presented at the Council on Undergraduate Education Feb 7th 2018 mtg.

<https://sites.google.com/umn.edu/cue/home?authuser=1>

7. Next Meeting April 4th 2018

Currently scheduled for April 4, 2018, 1pm