Minutes of the  
College and University Student Aid Directors (CUSAD) Meeting  
Wednesday, August 15, 2001

Participants: Marcia Pritchert, VCSU; Shirley Hanson, MaSU; Lynn Aaberg, WSC;  
Katie Nettell, LRSC; Ruth Gress, DSU; Pat Miller, NDSCS; Robin Holden, UND; Diane 
Christenson, MiSU-BC; Bob Neas, NDSU; Scott Mahar, HECN; Jeff Jacobs, BSC; Dale 
Gehring, MiSU; Sheila Tibke and Peggy Wipf, NDUS office.

Peggy Wipf began the meeting by welcoming Marcia and Shirley, VSCU/MaSU, and by 
saying that our thoughts are with Betty Schumacher today.

Selection of CUSAD Chairs
Jeff Jacobs and Dale Gehring recommended that the CUSAD chairpersonship be on a 
rotation basis similar to the one began in 1991, with the exception that VSCU/MaSU 
serve only once during the new cycle. All agreed. Thus, the directors of financial aid of 
their respective campuses will serve as chair of CUSAD for the following academic 
years:

<table>
<thead>
<tr>
<th>Institution</th>
<th>Year Range</th>
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<tbody>
<tr>
<td>Minot State University</td>
<td>2001-2002</td>
</tr>
<tr>
<td>Williston State College</td>
<td>2002-2003</td>
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<tr>
<td>ND State University</td>
<td>2003-2004</td>
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<tr>
<td>VCSU-MaSU</td>
<td>2004-2005</td>
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<tr>
<td>Bismarck State College</td>
<td>2005-2006</td>
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<tr>
<td>ND State College of Science</td>
<td>2006-2007</td>
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<tr>
<td>LRSC</td>
<td>2007-2008</td>
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<tr>
<td>University of North Dakota</td>
<td>2008-2009</td>
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<tr>
<td>MiSU-Bottineau Campus</td>
<td>2009-2010</td>
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<tr>
<td>Dickinson State University</td>
<td>2010-2011</td>
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</table>

Chairman Gehring conducted the meeting from this point on.

Vocational Rehabilitation Update
Dale Gehring shared with the group the outcome of a conference call he and Peggy Wipf 
had with Jim Leary, Director of Vocational Rehabilitation Services within the 
Department of Human Services, regarding a concern that Minot State University 
experienced with the awarding of student aid, in particular, student loans to students who 
are eligible for Voc Rehab educational services. Traditionally, when an eligible Voc 
Rehab client had brought in their financial aid award notification to their local Voc Rehab 
District office, Voc Rehab counselors automatically replaced an eligible clients 
subsidized Stafford Loan with Voc Rehab dollars. Dale noticed at his institution that this 
practice was no longer happening and it caused him concern and wanted to share this 
with the group. A result of this conference call was that Dale suggested to Jim Leary 
that Voc Rehab replace a Voc Rehab client’s subsidized Stafford Loan with Voc Rehab 
funds and that a Voc Rehab client’s unsub Stafford loan could be used to reduce the 
PC/SC contribution. Further, Dale stated that he mentioned to Jim Leary that it would be
helpful for financial aid directors to be a part of Voc Rehab’s annual meeting, possibly part of a panel discussion to share thoughts/concerns. Dale indicated that Jim thought that this was a good idea and will keep it in mind for future meetings.

**ERP Status**
Scott Mahar informed the group that Governor Hoeven has entered into a 90-120 day period to explore a statewide joint development partnership with MicroSoft Great Plains (MGP). Scott stated that the Governor’s intent is to enter a partnership with MGP at the end of October assuming that no major obstacles emerge during the view process. Starting the beginning of September 2001 there will be a four-step process that will occur as follows: (1) Develop a detail requirement plan known as an analysis of best business practices; (2) Develop a resource plan; (3) Develop an implementation plan; and (4) Define modules in which royalty clauses would apply. Rick Johnson, NDSU staff attorney, will be working on contract-type issues with MGP. Scott stressed that it is important that we do these processes right because of the potential financial impact on North Dakota.

Maximus, a best of business practices company, will help develop a required business plan within a 3 week timeframe starting September 10 for student services. Scott indicated he was asked to put together a team of financial aid personnel to help define best business practices as they relate to financial aid. This team will consist of: Jeff Jacobs, BSC; Jeanne Enebo, NDSU; Robin Holden, UND; Dale Gehring, MiSU; and Peggy Wipf, NDUS office. Scott stressed that this team will be responsible for input and that Tricia Campbell, HECN, will serve as a liaison to this team. Once this team defines what it feels it will take to do the business of financial aid in the future (a requirements/conditions document), then this document will be forwarded on to MGP and they have 5 days to respond as to whether they can meet the requirements or not. It’s at this point that a meeting will happen and if there are gaps, then it would go back to MGP to determine (one of four things): (1) this is a business process that can be worked around, (2) it can be resolved via a meeting, (3) a software vendor would be identified and further determined if vendor could handle our financial aid needs, and (4) MGP can provide a “proof of contact demo.”

Scott suggested blocking off the initial following dates for financial aid development. A more accurate list would be finalized by September 7.

September 10-21 (development/definition), October 1-5 (gap analysis), October 15-26 (consensus findings).

Because **communication** is so important throughout this whole process, a 2-hour IVN session every other week will be held. Invitees will include: Cabinet members; Academic, Administrative, and Student Affairs VP’s. Invitees will be encouraged to involve other key groups in these IVN sessions.

**Page Center**
Scott Mahar asked that each financial aid director go back to their campuses and visit with their coordinators to see how many use ‘page center’ to print off ISIR’s and evaluate
the benefits of such an option versus exploring how to change current business practices. Scott will be sending out an e-mail to the list serve for further discussion, as many of the directors do not use this feature.

**Design Team Concept**

General discussion was held relative to the importance of design teams and its membership make-up. Presently financial directors from UND and NDSU serve as representatives from the research universities; as well as MiSU representing the 4-year universities, and WSC representing 2-year colleges. It was encouraged that the concept continue as it plays an important role within the System by helping to define financial aid needs. However, it was stated that, when appropriate, ‘work-groups’ be formed to address more technical or detailed processes for resolution. It was also suggested as a part of change management, that directors from the various institution-types (2, 4-year, research) rotate membership on this committee to allow others to serve and bring new ideas.

**2002-2003 Miscellaneous (Personal) Expense & Books & Supplies**

Robin Holden recommended to the group that the miscellaneous expense line-item within a student’s cost of attendance budget for academic year 2002-2003 increase 3 percent or $2,740 over the 2001-2002 level for all NDUS institutions. It was further stated that the $2,740 figure is a suggested target. This recommendation was based upon information provided by the College Board and, in part, reflects an increase in gas prices. All participants agreed.

Lynn Aaberg also recommended to the group that because of increased book costs a student’s 2002-3003 books and supplies line-item increase from $600 to $700. Again, it was stated that this increase is a suggested target. All participants agreed.

**Collaborative Student Model Update**

Dale Gehring shared with the group a draft (August 14, 2001) Collaborative Student Admission, Registration, and Financial Aid model that has been adopted by the Collaborative Student Implementation team and the respective Design Teams. Dale further stated that this model allows students to enroll at multi-NDUS institutions and still receive one fee billing, transcript, and financial aid package.

Dale also informed the group that Katie Nettell would be representing the NDUS financial aid community on a newly formed NDUS Online advisory committee. Dale encouraged participants to share with Katie financial aid issues/concerns that need to be addressed by the full Online advisory committee. The group asked Katie to take to the NDUS Online advisory meeting two issues: (1) how and where do students buy books under the collaborative model and pay for them with their financial aid dollars and (2) what training opportunities will there be for all financial directors as it relates to the new collaborative model.
Refund Procedure – Correspondence Courses
Robin Holden moved and Pat Miller seconded a motion to allow NDUS institutions the flexibility in developing their own refund policy for correspondence study courses. All were in favor. The reason the flexibility model was suggested was because each of our campuses allows varying start and stop times for correspondence courses and it would be impossible to dictate an exact percentage refund. However, it was encouraged that institutions keep in mind their Return of Title IV policy as it relates to student’s dropping a course or withdrawing from the institution.

June 2001 Academic Affairs Minutes – Section 3.0
Peggy Wipf shared with the group a ‘for your information’ excerpt from the June 2001 Academic Affairs Minutes that stated, in part, “Board discussions are being held on how to re-engineer the business models typically being used by the campuses. AAC members questioned if the operations of the registrar, the financial aid office, and the business office be continued on some variant of current models, or should there be a centralization of these operations. Answers to these questions resolve around what NDUS gets for an information system.” Peggy encouraged the directors to go back and visit with their academic affairs VP’s to find out how financial aid could play a role in a re-engineering process and to keep at the forefront the idea of offering financial aid to students who chose to use the concept of learning anytime, anywhere.

It was suggested that the financial aid directors prepare a financial aid checklist that could be used as a tool for campuses to follow when creating new and/or multi-campus programs.

USDEO Distance Education Demo Site Visit Update
Lynn Aaberg, Jeff Jacobs, and Dale Gehring shared with the group highlights of their Distance Education Demo site visit from Fran Susman who is from the Denver Regional U.S. Department of Education. Lynn began by stating that Fran will be compiling a report of her North Dakota visit and will be sharing that report with the System office for distribution to all directors. Fran asked each campus such questions as how are you using the waivers (50% Rule and 12-hour Rule), how are/will you be tracking on-line attendance and satisfactory progress. Fran encouraged the directors to use our waivers and challenged the three directors (and their campuses) to think in terms of offering financial aid to non-traditional type term students recognizing that it would be a manual process to track. Fran stressed the importance of including financial aid offices in discussions of new campus program offerings as well as multi-campus offering development to ensure federal financial aid regulations are met. Lynn also stated that Fran would be back in the spring to visit NDSCS, NDSU, and UND.

Unrelated to the Demo Project, Jeff Jacobs expressed an interest in re-visiting the use of the Master Promissory Note -- multi-year note -- to include student loan borrowers from two-year NDUS institutions. Presently, student loan borrowers from two-year institutions have to sign a new student loan promissory note each year they borrow money. This is just the opposite for students who begin their education process at a 4-year institution -- they only need to sign a Master Promissory Note once. Jeff referenced
a May 6, 1999 letter that Chancellor Isaak wrote to Greg Woods at the U.S. Department of Education. Jeff stated that Mr. Woods never responded to Mr. Isaak’s letter.

**Dollars for Scholars**

Bob Neas informed the directors that he has agreed to serve on the Dollars for Scholars Governing Board representing the financial aid community. Bob stated that all NDUS institutions have become Collegiate Partners and that Deb Gebeke, ND’s Project Director for the States Dollars for Scholars Program, will be visiting each NDUS campus to develop a rapport with the directors and heighten awareness of this Program. Bob shared that Deb’s office is located in Casselton, ND.

**State Grant Funding Concerns**

Jeff Jacobs shared with the group a concern he had relative to the number of declining State Grant offers and the distribution of State Grant funds that has occurred over the past 4-5 years. It was moved by Jeff Jacobs and seconded by Robin Holden to encourage the State Grant Advisory Board to explore increasing the maximum dollar amount in statute from $600 to $1000. All were in favor.

**Legislative Incentive Programs**

Peggy Wipf briefed the directors on four new education incentive programs the North Dakota Legislature approved this Session. She stated that these programs are aimed at:

- Increasing the number of employees in technology occupations in North Dakota
- Increasing the number of doctoral program graduates in the state
- Increasing elementary and secondary teacher retention through loan forgiveness
- Assisting elementary and secondary teacher retraining

Peggy indicated that the State Board of Higher Education was charged with developing rules for each of these programs and will be discussing options at their September 2001 meeting.

**Future meetings**

The directors felt a face-to-face meeting was needed at least once a year – possibly early-August, and additionally conference call meetings would be planned on an as-needed basis.

Respectively submitted

Peggy Wipf