Minutes of the
College and University Student Aid Directors (CUSAD) Meeting
Tuesday, August 13, 2002

Participants: Sandy Klein, DSU; Bob Neas, NDSU; Pat Miller, NDSCS; Lynn Aaberg, WSC; Jeff Jacobs, BSC; Diane Christenson, MiSU-BC; Robin Holden, UND; Katie Nettell, LRSC; Betty Schumacher, VCSU; Shirley Hanson, MaSU; Dale Gehring, MiSU; Sheila Tibke and Peggy Wipf, NDUS Office.

Chairman Gehring opened the meeting and thanked everyone for coming.

High School Counselors Workshops:
Dale Gehring (also chair of NDASFAA’s professional development committee) shared with the financial aid directors that the high school counselor workshops will be held the week of November 18, 2002 at Bismarck State College, Dickinson State University, Lake Region State College, Minot State University, North Dakota State University, and University of North Dakota. Each site coordinator is responsible for providing Dale with date, time, and place information for the workshops along with campus parking options. Dale’s office is responsible for the workshop mailing, and Peggy Wipf will be providing one set of mailing labels. Jeff Jacobs suggested that e-mail addresses of registered attendees be collected. It was suggested that there be a $5.00 registration fee to help defray workshop costs. Recommended workshop topics included: FAFSA updates, video on credit card debt, electronic signature and promissory note updates, financial aid web site search options (need-based aid and scholarships), Connect ND updates relative to applying for admission on-line, academic advisor, NCAA requirements. Mr. Gehring stated that NDASFAA will soon be publishing the respective workshop dates, location, etc., information in a newsletter.

Collaborative Student Model Update
Mike Hillman shared with the financial aid directors a DRAFT copy of the July 15, 2002 Collaborative Student Admission, Registration and Financial Aid Procedures document. Dr. Hillman began by giving the following chronological overview of how this process all started:

- The passage of the Higher Education Act of 1998 allowed 15 colleges and/or consortia of colleges to participate in an U.S. Department of Education distance education demonstration program. The objective of the program was to allow colleges and/or consortia of colleges to waive certain federal regulations that restrict financial aid to students who chose to receive their education at a distance.

- Chancellor Isaak informed the Board of Higher Education that he directed his staff to pursue the possibility of becoming one of the 15 Distance Education Demonstration sites. Board member comments were supportive of this effort.
Chancellor Isaak formed a NDUS committee and charged them with the task of exploring and developing an application for NDUS participation in the U.S. Department of Education’s Distance Education Demonstration Program. Current committee members are: Lynn Aaberg, WSC; Dave Clark, BSC; Nancy Hall, MiSU; Julie Kubisiak, Bank of ND; Marshall Melbye, DSU; Jim Shaefifer, Chair, UND; and Scott Mahar, HECN. Mike Hillman and Peggy Wipf serve as resource people.

Mike Hillman briefed the Cabinet on the progress of the application process and received their support.

A Distance Education Demonstration Program application was submitted to the U.S. Department of Education and the U.S. Department of Education selected the North Dakota University System (NDUS) as one of 15 Distance Education Demonstration sites within the United States. The result of being selected as one of the 15 Demonstration sites allowed the North Dakota University System the opportunity to experiment with ways of delivering financial aid by requesting waivers of current statutory and regulatory financial provisions that limit NDUS students who chose to receive their education at a distance.

Dr. Hillman also stated that traditional student enrollments have decreased slightly while collaborative (distant-learning) have increased. Mike reminded the directors that the North Central Accreditation agency approved the NDUSO as the first System to offer degrees under a collaborative effort. Currently, there are 24 on-line degree programs.

Mike further stated that the Collaborative Procedures were developed as a best business practice document to serve as a road map for students; admission and registrars; financial aid directors; and business offices. The Procedures written in the July 15 Draft have proven to be successful for those who have chosen to make it work. Mike indicated also that the Collaborative Procedure Model has allowed the NDUS to service collaborative learning students with one transcript, one fee billing statement, and one financial aid package. Dr. Hillman mentioned that each NUUS campus has an appointed collaborative person to advise students on the collaborative process and distributed a Student Guide pamphlet to each director.

The following questions/suggestions were given by various directors to help Dr. Hillman and the Registrars further enhance the Collaborative Procedures document:

- Identify how a student’s home campus is determined.
- Identify which campus is able to offer a waiver for cultural diversity or reduced tuition rate, e.g., WUE rate?
- Does a collaborative student only need to apply for admission at one institution? The answer was, “yes.”
- B5: It was suggested that this area is confusing as the HC sets up access. Suggested clarifying language: “Tuition and special course fees tied to courses to cover fee variations.”


- B9: It was suggested to clarify further what a permanent record means.
- B9: Grades need to be posted in a timely manner to accommodate satisfactory progress. Having three weeks between terms is helpful to allow for satisfactory progress processes.
- B10 – last paragraph: Directors need to have a grade to pay out financial aid (cum strip problem, too). Lynn Aaberg and Peggy Wipf are to check with Fran Susman, USDOE, to verify if all grades need to be part of a student’s grade point average.
- B11: It was suggested to leave in FR84 and RG50. RG50 assists HC & PC verify if a student is registered at one campus or the other.
- B11: Directors questioned why this screen was available to all as there may be some FERPA concerns of each campus having access to ALL student records within the System.
- Dr. Hillman indicated he is hopeful concerns expressed regarding withdrawals (add/drops) will be cleaned-up once Connect ND is fully implemented.

Connect ND Update
Paula Kurtz (HECN), Ted Montemayor (Maximus), Scott Mahar (HECN), Jeannie Enebo (NDSU) joined our meeting from Grand Forks via H323.

Scott Mahar updated the directors relative to where the financial aid component is within the Connect ND process. Scott stated that:
- “The focus of the Project is improving service, especially for students.”
- The Business Process Review and Gap/Fit Analysis processes have been completed;
- Maximus and Paula Kurtz continue to work on configuring the results of the BPR and Fit sessions into the People Soft software;
- During October 14-31 subject matter experts along with other invited guests will be part of prototype financial aid training;
- During November 4 – 22 subject matter experts along with other invited guests will be a part of testing the new software;
- The recruitment portal will be live at VCSU/MaSU September 23;
- The student admission application will be live at all NDUS institutions by October 7;
- Financial aid will be live at VCSU/MaSU (including People Soft upgrades) in January 2003;
- An 11-digit ID number will be assigned each student and this number will be common among all 11 NDUS campuses;
- HECN will not be running the new System (Maximus will). Governor Hoeven will decide where the data bases will be housed, e.g., ND or CA;
- All 11 NDUS campuses will be up and running for FAFSA year 2004-05;
- VCSU will host a MaSU/VSSU pilot-site kick-off on August 22 @ 8 a.m. You will be able to view this kick-off on web cast at www.discovernd.com/connectND;
- All current program problems NDUS campuses are experiencing are to go through the help desk in the form of a PTR or by calling 777-2222 and stating
your problem and indicating if it is urgent or high priority. Scott, Paula, Trisha, and Charles are committed full-time to ConnectND and are unable to directly handle your problems directly;

- Student admit has met all its deadlines to date;
- Subject Matter Experts keep in mind ERP Implementation Guidelines (January 2002), Principle #6: that states “we will strive for a system-wide solution that, to the extent possible, recognizes the unique mission and needs of each campus” when making software config decisions [How can be work smarter and automate our processes];
- That by standardizing such things as verification, the new System will be able to electronically generate a letter (and envelop) ready for mailing which will inform the student what is missing and needed;
- NDUS campuses will be able to award financial aid on a continuous basis;
- Not everyone will be able to run queries. Only super users would be able to run queries;
- Queries (reports as we know them today) will be written for the System on an approved basis;
- Peggy Wipf is to do some checking on benefits of CSS Profiling; and
- If we need to reach Scott or Paula their cell phone numbers are as follows: Scott’s cell: 739-1294, Paula’s cell: 741-3456.

**Priority Funding Date:**
It was moved by Jeff Jacobs and seconded by Betty Schumacher that effective for FAFSA year 2004-05 the priority funding date for state aid and campus-based aid will be March 15 (date processed). All voted aye. Motion carried.

**Packaging Sequence:**
The financial aid directors were unable to reach consensus on this topic due to enrollment management decisions that have been made on their campuses as it relates to recruitment and retention. However, the directors recommended three packaging scenarios be considered when People Soft testing occurs. These scenarios are:

**Scenario #1**
Federal Pell Grant
Equity, i.e., known Scholarships at the time of packaging and State Grants
Campus-based aid (ordered defined by respective campuses/by grade and program level)
Federal Stafford

**Scenario #2**
Federal Pell Grant
Campus-based aid (ordered defined by respective campuses/by grade and program level)
Federal Stafford
Scenario #3
Federal Pell Grant
Federal Stafford
Campus-based aid (ordered defined by respective campuses/by grade and program level)

After reviewing the various test-runs, the directors indicated that they would like to revisit this topic and may be able to make an informed recommendation.

Verification
The financial aid directors were able to reach partial consensus regarding which students’ FAFSA information should be verified in order to retain financial aid program integrity. These include: all FAFSA’s selected by US Department of Education, all parents and/or students who estimated their income taxes, all “C” codes, all parent AGI’s equal to 0, and all student (independent model) AGI’s equal to 0.

The financial aid directors recommended that queries, to further enhance verification, be run for the following cohorts: parents/students taxes equal AGI, family size compared to number in college, independent student or ward of the court, graduate and professional students, and parent worksheet C equals AGI.

2003-04 Miscellaneous (personal) Expense & Books & Supplies
It was moved by Robin Holden and seconded by Jeff Jacobs that the miscellaneous expense line-item within a student’s cost of attendance budget for academic year 2003-04 be increased to $2,800 for all NDUS institutions. It was further stated that the $2800 figure is a suggested target. All directors voted aye. Motion carried.

Lynn Aaberg recommended that the books and supplies line item within a student’s cost of attendance remain at $700 for 2003-04. Again, this is a suggested target. All directors agreed.

Funding for Different Degrees
Jeff Jacobs shared with the group that he is seeing a larger number of individuals with bachelor and master degrees coming back to their campus for retraining in a different degree program and wanting financial aid. Jeff asked other directors for suggestions on how to handle financial aid packaging for these individuals.

Performance Accountability Survey Update
Julie Schepp apprised the directors that as a result of SB2003, as authorized by the 2001 Legislative Session, our NDUS institutions will be surveying numerous groups of individuals on the campuses and/or alumni to gain a better understanding about: student satisfaction, employee/employer satisfaction, retention management, enrollment management, alumni input, etc. The information gained from these surveys will help populate the System’s Accountability Report.
NDUSO Update
Katie Nettell shared with directors that the NDUSO Advisory Council will be meeting on August 22, 2002 to discuss such issues as consistent student policies, assessment of general education requirements, continued resources for the project as well as how to increase the number of students participating.

Reauthorization Strategy
Peggy Wipf ask the directors for their input in selecting key areas to monitor and respond to, as appropriate, regarding Reauthorization. The following ideas were mentioned: last day of attendance, increased loan limits, cash management rule, 30-day rule, 2-year schools MPN, distance education.

USDEO Distance Education Demo Project Update
Lynn Aaberg reported that our NDUS campuses are only responsible for completing one more student surveying cycle. This survey needs to be completed by October. Lynn and Peggy Wipf informed the directors that Fran Susman, USDOE, is going to be visiting NDSU on September 25, NDSU on September 26, and UND on September 27 and will be compiling a report that reflects how each campus has been using the approved waivers, i.e., 50% Rule and 12-hour Rule. Fran has continuously encouraged the directors to think in terms of offering financial aid to non-traditional students.

Dollars for Scholars Update
Bob Neas shared with the directors that the Dollars for Scholars board:
- Has been working on their vision, mission, and values statement as well as their goals for 2002-03;
- Started 7 more Scholars chapters;
- Has 62 Scholars chapters;
- Is working on their policies and guide book updates;
- Needs to raise $17,000 to cover shortfall;
- Is looking to receive $1.5 million in endowments over 3 years;
- Is looking to do Chapter training; and
- Is looking for ways to increasing institutional matching partners.

Other
Members of the group expressed concerns on the timing of the Common Line upgrading by the Bank of North Dakota. It was suggested that SLND be encouraged to communicate earlier with the directors on any project delays relative to Common Line, etc., to ensure that the transmitting of student loans does not disadvantage students at the beginning of each term.

The directors suggested meeting twice a year once Connent ND is in place as well as on an as needed basis to address issues as they arise.
The directors of financial aid will serve as chair of CUSAD for the following academic years:

- Williston State College 2002-03
- ND State University 2003-04
- Valley City State University 2004-05
- Bismarck State College 2005-06
- ND State College of Science 2006-07
- LRSC 2007-08
- University of ND 2008-09
- MiSU—Bottineau Campus 2009-10
- Dickinson State University 2010-11
- Mayville State University 2011-12
- Minot State University 2012-13

Prepared by:
Peggy Wipf