

Access & Persistence



ADVISORY COMMITTEE ON STUDENT FINANCIAL ASSISTANCE



FALL 2011

ACSFA
Fall Hearing
Wrap-up

Net Price Calculators:
A Follow-up to
The Bottom Line

Upcoming
Seminar Series:
The Latest Research
on Access &
Persistence Issues

Member Profile:
Sharon Wurm

ACSFA
Announcements

MESSAGE FROM THE CHAIR

Across the country, new students are settling into the routines of their first college experience, while financial aid offices are gearing up for another application season. This year, aid offices are required to offer applicants a new tool to help determine affordability: the net price calculator. In the *Higher Education Opportunity Act* of 2008 (HEOA), Congress mandated that postsecondary institutions implement net price calculators by October 29, 2011. The HEOA also required the Secretary to develop models for financial aid award letters to assist families in understanding the net price they would face while enrolled at a specific institution. But will the lack of comparability inherent in financial aid award letters from different institutions be a feature of these mandated net price calculators? And, if comparability is a problem, will these calculators really be useful tools for students and parents?

The Advisory Committee's report, [*The Bottom Line: Ensuring That Students and Parents Understand the Net Price of College*](#), considered these questions, concluding a broad consensus had emerged that the higher education community should explore these issues and develop voluntary guidelines for the benefit of students and parents. Schools should now be using a net price calculator for their students. As a result, the Committee is now in a position to make recommendations on how closer alignment of components, definitions, and output is possible, given significant differences in institutional mission and operations. The Committee plans to conduct a follow-up evaluation of the implementation of net price calculators, one of four new reports with which the Committee will be engaged during fiscal year 2012.

The other three reports include the final report of the [*Higher Education Regulations Study*](#) (HERS), the nontraditional students study, and a primer on access and persistence for policymakers. Discussion at the Committee's September 2011 hearing will serve as the basis for the nontraditional students report. The hearing also saw the release of the [*preliminary findings report*](#) of HERS, which documents perceptions of the higher education community toward the overall system of regulation that implements the HEA and perceived burden for a specific set of regulations. The final report will be released shortly. The policy primer will be generated from a seminar series on the latest research on access and persistence issues, a series that will be open to the public. More information on the seminars will be announced as details are finalized.

Fiscal year 2012 promises to be a busy and exciting year for the Advisory Committee. As its new chair, I look forward to our work to provide Congress and the Secretary with recommendations and analyses on access and persistence and any other charges Congress may see fit to assign.

Norm Bedford

80 F Street NW, Suite 413, Washington DC 20202-7582 Tel: 202/219-2099 Fax: 202/219-3032

An independent committee created by Congress to advise on higher education and student aid policy

ACSFA FALL HEARING WRAP-UP

On September 30, 2011, the Advisory Committee held a one-day hearing in Washington DC to gather information relative to two of its congressionally mandated charges: the [Higher Education Regulations Study](#) (HERS) and the charge to provide annual reports to Congress on the adequacy of grant aid, postsecondary enrollment rates, and postsecondary graduation rates for low- and moderate-income students. During the morning session, Committee members received feedback from senior executives and office administrators concerning the [Higher Education Regulations Study: Preliminary Findings](#) report. The afternoon session consisted of testimony from two panels, the first composed of state and the second of institutional experts, on the barriers, best practices, and federal role to improve degree and certificate completion among nontraditional students. Hearing testimony will serve as the basis for the Committee's third annual report on access and persistence.

Higher Education Regulations Study: Preliminary Findings

In the *Higher Education Opportunity Act of 2008*, Congress charged the Advisory Committee on Student Financial Assistance with conducting a review and analysis of regulations affecting higher education to determine the extent to which regulations are overly burdensome and need to be streamlined, improved, or eliminated. Specifically, Congress recommended the Committee determine which regulations are duplicative, no longer necessary, inconsistent with other federal regulations, or overly burdensome.

This report presents preliminary findings from all elements of the study completed thus far—the review panels, the website, consultations, and web-based survey—to assess the perceptions of the higher education community toward both specific regulations and the overall regulatory system, as well as preferences for future regulatory reform efforts. The elements of this study have been described in detail in previous issues of *Access & Persistence*. Design of the study efforts, including the survey, was driven by five research questions:

- ***Regulatory Burden:*** How burdensome does the higher education community consider the regulations under the HEA? Which regulations are perceived as most burdensome?
- ***Regulatory Improvement:*** Can HEA regulations be streamlined or eliminated without adversely affecting program integrity, accountability, student access, and student success?
- ***System of Regulation:*** Are key components of the system of regulation under the HEA perceived as needing change?
- ***Cost Savings:*** Would streamlining or eliminating individual regulations reduce costs for institutions and students? Would modifications to the system of regulation reduce such costs?
- ***Future Regulatory Reform:*** What should be the focus of future regulatory reform efforts for higher education? How should such efforts proceed?

This study documents the perceptions of the higher education community regarding the overall system of regulation that implements the HEA, and perceptions of the burden of a specific set of individual regulations. However, the study did not collect the data necessary to assess whether those perceptions are accurate. Such an assessment would require in-depth case studies of burden and cost at a representative sample of institutions. Since the release of the preliminary findings report, the Advisory Committee has been conducting follow-on activities to validate and expand on the preliminary findings. These activities involve members of the higher education community, including a subset of survey respondents who volunteered to assist in explicating and refining the preliminary findings. The final report, available shortly on the Committee's website, will present a final set of findings and recommendations.

**SEPTEMBER 30, 2011
HEARING PARTICIPANTS**

**Morning Session
*Higher Education Regulations Study Preliminary Findings: Community Reactions***

Senior Executive Panel

Mr. Sanford Ungar
President
Goucher College

Ms. Sarah Phelps
General Counsel
Trinity Washington University
(on behalf of Ms. Patricia McGuire, President)

Dr. Troy Johnson
Vice Provost for Enrollment
University of North Texas

Office Administrator Panel

Ms. Bonnie Joerschke
Director of Student Financial Aid
University of Georgia

Mr. John Higgins
University Bursar
Purdue University

Ms. Jessica Ickes
Director of Institutional Research and Assessment
Saint Mary's College

Ms. Brenda Brown
Director of Financial Aid
University of Miami School of Law

Mr. Marcus Szymanoski
Manager of Training and Communications, Regulatory Affairs
DeVry Inc.

Dr. Patricia Hurley
Associate Dean/Financial Aid Director
Glendale Community College

Nontraditional Students Study

For several decades, higher education in America has strived to ensure academic quality, access, and student success. In the past, these efforts have produced among the highest college completion rates in the world. Today, however, these rates are stagnant or falling, particularly among young Americans. This trend threatens to undermine the nation's global competitiveness and further exacerbate inequality in the nation's income distribution. Reversing the trend and increasing college completion has become a national imperative at all levels of government. At the federal level, the goal to have the world's highest rate of college completion is now front and center. Achieving this important goal by 2020 will require a formidable effort to increase the nation's college degrees and certificates.

Previous Advisory Committee reports have shown how challenging achievement of the 2020 goal will be among the nation's recent high school graduates. Complementing those reports, this effort focuses on those students who have been referred to in the past as the nontraditional population, the largest subset of students in the nation. Defining or labeling this population concisely is virtually impossible, given the considerable diversity of its demographic and socioeconomic characteristics. Categorized across the dimensions of age, marital status, family size and composition, level and type of employment, and educational preparation and goals, this population – often referred to as 21st century or contemporary students – consists of many subgroups, each with unique circumstances, educational needs, and goals.

Formulating a federal strategy to achieve the 2020 goal among these students is an undertaking as daunting as the population is large and diverse. The task is made more difficult by two considerations. First, higher education is not structured to serve this population adequately, nor are most financial aid programs. Second, unlike that for recent high school graduates, nationally representative data tracking their college enrollment and persistence do not exist. Thus, formulating a comprehensive federal strategy for increasing college completion among these students must begin with careful consideration of the invaluable experience and wisdom of those in higher education who have dedicated a significant portion of their professional lives to better integrate higher learning with the life and work of older students.

To facilitate formulation of a comprehensive federal strategy, at its September hearing the Advisory Committee asked two panels of experts – state and institutional – to address three key questions of policy and practice related to adequately serving these students:

- **Barriers:** What are the primary barriers to access and persistence for nontraditional students?
- **Best Practices:** What are the most promising state and institutional strategies and policies for overcoming those barriers?
- **Federal Role:** What role should the federal government play in encouraging states and institutions to implement best practices?

The overriding consensus among the panelists was that increasing degree and certificate completion among nontraditional students will require modifications in the structure and delivery of higher education, as well as changes to federal student aid programs. Innovative proposals for policy and practice will be summarized in the report's final chapter.

The ultimate challenge for the federal government is to find ways to encourage implementation of the best of these state and institutional proposals, while simultaneously increasing degree and certificate completion among recent high school graduates who have prepared for and aspire to college. The Advisory Committee's report on nontraditional students will be available shortly on our website. ◆

Afternoon Session: Nontraditional Students

State Panel

Mr. Travis Reindl

Program Director, Education Division
Center for Best Practices, National Governors Association

Dr. Paul Lingenfelter

President
State Higher Education Executive Officers

Dr. Peter Stokes

Executive Vice President & Chief Research Officer
Eduventures, Inc.

Dr. Camille Preus

Commissioner
Oregon Department of Community Colleges and Workforce Development

Mr. Scott Copeland

Policy Associate for Student Services
Washington State Board for Community and Technical Colleges

Ms. Amy Sherman

Associate Vice President for Policy and Strategic Alliances
Council for Adult and Experiential Learning

Institutional Panel

Dr. Thomas Flint

Vice President for Regional Accreditation
Kaplan University

Dr. Cristobal Bustamante

President
Rio Salado College

Mr. Scott Jenkins

Director of External Relations
Western Governors University

Mr. Javier Miyares

Senior Vice President for Institutional Effectiveness
University of Maryland University College

Mr. Thomas Dalton

Assistant Vice President for Enrollment Management
Excelsior College

Dr. Robert Lapiner

Associate Vice Chancellor for Global Continuing Education
New York University

NET PRICE CALCULATORS: FOLLOW-UP TO *THE BOTTOM LINE*

In the *Higher Education Opportunity Act* of 2008, Congress included a new requirement on net price calculators aimed at ensuring that students and parents are provided with the data they need to make sound decisions. To ensure broad availability of net price calculators, Congress directed the Department of Education to develop a template as guidance, and required each institution to make its own version available on its website by October 29, 2011. To minimize current confusion and complexity surrounding financial aid award letters, Congress also directed the Department to develop a model award letter for institutions to follow.

On March 17, 2011, the Advisory Committee held its spring hearing in Washington DC and devoted two panels to a discussion of issues associated with net price calculators and financial aid award letters, a discussion that served as the basis for the Committee's report [*The Bottom Line: Ensuring That Students and Parents Understand the Net Price of College*](#). Panelists were asked to respond to several broad questions regarding student and parent data needs in terms of college expenses and financial aid, the history and current status of financial aid award letters, whether net price calculators would provide students with the data needed to make informed decisions, and the extent to which financial aid award letters and net price calculators can be standardized and integrated. Additional detail on these questions is available in the report itself.

The Bottom Line found that the current lack of comparability of financial award letters from institution to institution provided a cautionary tale for the future of net price calculators. While net price calculators have the potential to be useful tools for students and parents, they are likely to suffer from several limitations warranting further examination. The report also concluded that it would be wise for the higher education community to explore these issues and develop voluntary guidelines for net price calculators for the benefit of students and parents.

Now that net price calculators have been implemented, the Advisory Committee is at work on a follow-up report to *The Bottom Line*. The follow-up will consist of a thorough evaluation of net price calculators and will address the following two questions:

- 1) Do the net price calculators implemented by institutions provide students and parents with the information they need to make informed decisions about enrollment at that institution?
- 2) Do net price calculators allow students and parents to compare one institution to the other institutions in a student and family's choice set?

In addition to these questions, other issues associated with net price calculators will be addressed, including: Where are the net price calculators located on institutional websites? Are they easy to find? What do the outputs look like?

To arrive at recommendations, an evaluation team will compare the net price calculators from clusters of institutions from around the country. Clusters will include like-type, cross-type, and peer comparisons. Institutions used in the study will remain anonymous. The anticipated completion date for the follow-up report is early 2012. ◆

UPCOMING SEMINAR SERIES: ACCESS & PERSISTENCE ISSUES

In the *Higher Education Opportunity Act* of 2008, the Advisory Committee on Student Financial Assistance was charged with reporting annually on the condition of access and persistence for low- and moderate-income students. The Advisory Committee continues to make significant progress on this charge and plans to release its fourth annual report in fiscal year 2012.

The Advisory Committee will have delivered the following four annual reports to Congress and the Secretary of Education by the end of fiscal year 2012:

- **First Annual Report**—[*The Rising Price of Inequality: How Inadequate Grant Aid Limits College Access and Persistence*](#) focused on the adequacy of need-based grant aid for low- and moderate-income students.
- **Second Annual Report**—[*The Bottom Line: Ensuring That Students and Parents Understand the Net Price of College*](#) focused on the issues associated with net price calculators and financial aid award letters.
- **Third Annual Report**—Forthcoming shortly, this study will focus on the barriers, best practices, and federal role in increasing degree completion among nontraditional students.
- **Fourth Annual Report**—By September 2012, the Advisory Committee will release a primer on access and persistence research and policy.

To inform its fourth annual report, the Committee will conduct a seminar series on the latest research related to access and persistence issues. The series will bring leading researchers and policymakers to Washington DC to present recent or pending work involving a variety of relevant issues. The main themes of the series will include early awareness and intervention efforts, access and choice issues, transfer patterns and considerations, and success and completion across a student's educational cycles and stages. Contextual issues, such as changes in student demographics, higher education finances, and data and methodological limitations, will also be a focus within each of these themes.

The presenters will focus on three main questions as each relates to their respective areas of specialty for the seminar series:

- What is known about this specific area of access and persistence research?
- What is not known and thus requires further research? And what might that entail?
- What conclusions can be drawn for policy and practice today?

The seminars will be open to the policy and research community not only in Washington DC, but also across the country. Attendees will have the opportunity to engage in a discussion of the issues following each presentation.

The seminar series will serve, collectively, as information for the Committee's fourth annual report to Congress and the Secretary, a primer on current issues related to access and persistence for federal policymakers. Further details regarding the seminar series will be provided in the coming weeks. ◆

Access & Persistence
is published quarterly
by Advisory Committee
members and staff

MEET A MEMBER

COMMITTEE MEMBERS

Norm Bedford

Chair
Director
Financial Aid & Scholarships
University of Nevada, Las Vegas

Helen Benjamin

Vice Chair
Chancellor
Contra Costa
Community College District

David L. Gruen

Past National Chair
National Association of
Student Financial Aid Administrators
Retired

Anthony J. Guida Jr.

Senior Vice President
Strategic Development
& Regulatory Affairs
Education Management Corporation

Kathleen Hoyer

Student Member
University of Maryland

William T. Luckey Jr.

President
Lindsey Wilson College

John McNamara

Vice President
for College Development
Rockford College

Deborah Stanley

Director of Financial Aid
Bowie State University

Sharon Wurm

Director of Financial Aid,
Scholarships, Student Employment
& Veterans Services
Truckee Meadows Community College



Sharon Wurm

Director of Financial Aid, Scholarships, Student Employment & Veterans Services Truckee Meadows Community College

Mrs. Sharon Wurm was appointed by the President Pro Tempore of the Senate in 2010 to serve a term that expires in 2014. Mrs. Wurm has had a lengthy career in student financial aid, and in June of 2011 rejoined the staff at Truckee Meadows Community College (TMCC) as the Director of Financial Aid. In her current position, she oversees financial aid, scholarships, student employment, and veterans educational services. Mrs. Wurm has 22 years of experience in financial aid with the Nevada System of Higher Education (NSHE), most recently working for five years at the NSHE System Administration Office as Director of Financial Aid. Prior to working at the System Administration Office, she worked for ten years at TMCC and for seven years at the University of Nevada, Reno, all in financial aid. In addition to her financial aid responsibilities, she serves as the campus-wide functional co-lead for TMCC's PeopleSoft system, as the Nevada State Liaison for Complete College America, and as a member of the Nevada Statewide ACT Council. She is a member of several financial aid associations, and volunteers with the local Boys & Girls Club, helping low-income youth access college and apply for financial aid and scholarships, as well as serving as a mentor under their "Be Great Graduate" program. Mrs. Wurm holds an MS in counseling and educational psychology and a BS in business administration (computer information systems emphasis), both from the University of Nevada, Reno. She has been married for 28 years to her husband Mike, and they have two children, Megan, a college freshman, and Zach, a high school sophomore. In her spare time, she enjoys spending time with her family, going to sporting events, and is an avid reader. ♦

COMMITTEE STAFF

William J. Goggin

Executive Director

Janet Chen

Director of Government Relations

Anthony Jones

Director of Policy Research

Tracy D. Jones

Senior Administrative Officer

Jennifer R. Nupp

Associate Director of Policy Research

Jeneva E. Stone

Senior Writer

ACSFA Announcements

On September 28, 2011, the Advisory Committee released its latest report, the [*Higher Education Regulations Study: Preliminary Report*](#).

Staff member **Janet Chen** has been promoted to **Director of Government Relations**.

Ms. Jennifer Nupp has accepted the position of **Associate Director of Policy Research**. Previously, she directed the implementation of the Fulbright Teacher Exchange Program. Ms. Nupp is also the Deputy Director of the Higher Education Regulations Study.

The Advisory Committee on Student Financial Assistance (Advisory Committee) is a Federal advisory committee chartered by Congress, operating under the Federal Advisory Committee Act (FACA); 5 U.S.C., App. 2. The Advisory Committee provides advice to the Secretary of the U.S. Department of Education on student financial aid policy. The findings and recommendations of the Advisory Committee do not represent the views of the Agency, and this document does not represent information approved or disseminated by the Department of Education.

ACSFA, 80 F Street NW, Suite 413, Washington DC 20202-7582

Tel: 202/219-2099 Fax: 202/219-3032 Email: ACSFA@ed.gov

Please visit our website: www.ed.gov/ACSFA