

Attachment D Training Prototypes

Subgroup 1

Training Topic: Default Management

Method: Roundtable Workshop/Small Group

- I. Overview (ED representative reviews statutory requirements)
- II. Small group discussions on the following topics:
 - A. Entrance/exit counseling
 - B. Disclosure review on endorsement
 - C. PCA letters procedure
 - D. Post-default counseling
 - E. Debt management counseling
 - F. Grace period and post-graduation counseling (each group meets for 20-30 minutes; participants have the opportunity to discuss multiple topics)
- III. Each group would monitor meetings and report back to the group as a whole with any issues that come up.

The idea is that most financial aid personnel know the regulations as they relate to default prevention. What would be useful is networking and sharing ideas and information to enrich the community as a whole.



Subgroup 2

Training Topic: Cash Management

Method: Videotape

- I. Audiences
 - A. CPAs or auditors (independent)
 - B. Fiscal business office personnel
 - C. Financial aid office personnel
 - D. Owner/Director
- II. Topics
 - A. EFT/ACA
 - B. Acid Test
 - C. Excess Cash
 - D. Drawdowns
 - E. Reserves
 - F. Letters of Credit
 - G. Reconciliation
 - H. ED/PMS - 272
 - I. Exceptions
 - i. When regulations are not met
 - ii. Additional regulations that apply
 - iii. Any other pertinent topics
- III. Delivery
 - A. Content
 - i. Indexed by topic
 - ii. Provide hotline number for additional Q & A
 - iii. Training materials on disk
 - B. Alternative Video Production Method
 - i. One-time EITN broadcast with videotape of broadcast distributed
 - ii. This would include Qs & As from the audience



Subgroup 3

Training Topic: Refunds

Method: Workshop

- I. Brief discussion of regulations (changes and updates—1 hour)
 - A. ED directed
 - B. Citing resources
 - C. Providing handouts
- II. Breakout sessions (limit to 15 breakout sessions—1 hour)
 - A. Specific examples
 - B. Diskette containing worksheets
- III. Regroup
 - A. More examples for clarity
 - B. This training should be focused around universal case studies (for instance, student withdrew, refund was made, but now student has returned with reduced aid eligibility)

<p style="text-align: center;">Attachment E Comments on <i>Funding Your Education</i></p>

- Add a section on how to use and how not to use this publication.
- Add a glossary.
- Encourage students not to be afraid of the financial aid process.
- Add Internet address for ED.
- Add cost issue with scholarship searches.
- Like the use of “career school” rather than “proprietary school” or “non-traditional school.”
- Address the concern that parents with credit problems will think they can’t receive any financial aid.
- Need to address wider/more realistic family scenarios.
- Prefer the use of the term “finance” instead of “pay” when referring to financial aid.
- Prefer loans to be referred to as “discharged” instead of “canceled.”
- A brief summary of financial aid programs should be mentioned sooner in the publication.
- Add a statement that “alternative program length can keep costs down for a student, not just attending a community college.”

<p style="text-align: center;">Attachment F Biggest Concerns and Issue Bin</p>
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Biggest Concerns

The following concerns were expressed by participants about student financial aid and the U.S. Department of Education:

- OGC is creating problems.
- ED's comprehension and understanding of the financial aid office and its operations.
- Rumor about separating proprietary schools with regard to Title IV funding. Proprietary schools should be funded in the same way that community colleges are funded.
- ED needs to focus on students, not on schools.
- Disagree with the recent default rate regulations separating out degree vs. non-degree schools.
- Overregulation—need to be more practical and realistic, need school-sector equity.
- ED policy representatives need to come out and visit schools.
- Re-emphasize “good guy” vs. “bad guy” schools.

Issue Bin

The following are the issues generated during the two-day meeting that were placed in the issue bin:

- Align the goals of trainers with the goals of program reviewers.
- The delivery of training announcements needs to sell the program and include the agenda.
- Examples must be more realistic, not an easy calculation. (Refund examples pertinent to a proprietary school were obtained from one participant.)

- Forms are useful on disk.
- Good faith effort should equal professional judgment.
- Future communication among the focus group members and between the focus group and ED.
- ED policy representatives need to come to focus groups and get out into the community.