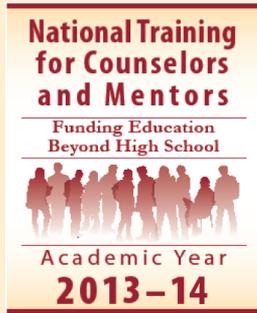


Training of Trainers

August 16, 2012



Training of Trainers

August 16, 2012

Slide 2

NT4CM 2013 -14

NT4CM Overview

- Partnership between Federal Student Aid, NASFAA, NCHelp, NACAC, ASCA, NCAN, and COE
- Provide financial aid training to high school counselors and mentors
- Training in participating states provided by state financial aid associations, guaranty agencies, and/or college access programs

Slide 3

NT4CM 2013 -14

Training of Trainers

August 16, 2012

NT4CM Overview

- NT4CM will provide counselors and mentors ongoing support through
 - Networking with trainers and colleagues
 - Website content
- NT4CM provides CEUs for counselors

Slide 4

NT4CM 2013 -14

NT4CM Steering Committee

- Maisha Challenger, Federal Student Aid
- Jennifer Martin, NASFAA
- Kristen Earle, NCHHELP
- Matthew Drake, NACAC
- Don Fraser, NACAC
- Jill Cook, ASCA
- MorraLee Keller, NCAN
- Heath Alexander, COE

Slide 5

NT4CM 2013 -14

Today's Presenters

Material for today's Webinar will be presented by representatives from:

- Federal Student Aid
- ASCA
- NASFAA
- NCAN
- COE

Slide 6

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Webinar Agenda

- NT4CM housekeeping details
- Federal Update
- Tips for Trainers
- Review of Curriculum
- Your questions

Slide 7

NT4CM 2013 -14

NT4CM Housekeeping Details: Accessing Materials

- NT4CM materials available on-line at:
www.fsa4counselors.ed.gov/trainers
- Counselors and mentors may access resources online at
www.fsa4counselors.ed.gov/NT4CM

Slide 8

NT4CM 2013 -14

Keeping In Touch throughout 2013-2014 Training

Variety of on-going interaction:

- Emails to/from NT4CM@ed.gov
- Conference calls as needed
- Liaison with registration lead

Slide 9

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Federal Update

Presented by Jeff Baker
Director, Policy Liaison
and Implementation Staff

Slide 10

NT4CM 2013 -14

NASFAA's Tips for Trainers

- Available in the NT4CM E-library
- Includes tips on the following topics:
 - Use of icebreakers and brain teasers
 - Dealing with difficult participants
 - Quick tips for successful presentations
 - Additional presentation guidelines

Slide 11

NT4CM 2013 -14

Curriculum Materials

- Module introduction page
- Module objectives
 - Module materials
 - Tips for Trainers
 - Tips specific to a particular mode
 - General tips applicable to all modules

Slide 12

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Curriculum Materials

Module materials

- Instructor's guide
- PowerPoint presentation
- Participant Guide with module-appropriate handouts and copy of PowerPoint presentation with slides printed three to a page

Slide 13

NT4CM 2013 -14

Review of Curriculum Materials

- Will review module materials in the order in which they appear on recommended workshop agenda
- Realize that states may not present all module and may present in a different order

Slide 14

NT4CM 2013 -14

Overview of Financial Aid Module: Objectives

- Define important terms
- Discuss categories and types of financial aid
- Provide information about common federal aid programs
- Provide information about other forms of financial aid

Slide 15

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Overview of Financial Aid Module: Icebreaker Quiz

Purposes:

- Gauge the financial aid knowledge of participants
- Give participants an opportunity to network with each other

Slide 16

NT4CM 2013 -14

Overview of Financial Aid Module: Icebreaker Quiz

Gauging financial aid knowledge of participants

- Indicate what topics on which to spend more time during the presentation
- Direct individual participants to resources that provide more information

Slide 17

NT4CM 2013 -14

Overview of Financial Aid Module: Icebreaker Quiz

- “Open book” exercise
- Use workshop materials and each other as resources
- Depending on workshop size, consider breaking participants into small groups

Slide 18

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Overview of Financial Aid Module: Financial Aid Program Summary

- Resource to complete icebreaker quiz
- Comprehensive handout describing major federal financial aid programs
- Includes summary chart of Title IV aid programs

Slide 19

NT4CM 2013 -14

Completing the FAFSA Module: Objectives

- Understand how to apply for federal financial aid
- Understand application output and how to make corrections

Slide 20

NT4CM 2013 -14

Completing the FAFSA Module: IRS Data Retrieval

- Applicant will be given option to submit a real-time request to IRS
- If IRS has data, applicant will have option to transfer data to FAFSA
- Participation voluntary

Slide 21

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Completing the FAFSA Module: IRS Data Retrieval

- Available 2/1/13 for 2013–14 application cycle
- May be used for initial applications and corrections
- Will be coded on Institutional Student Information Report (ISIR) if income data is from IRS
 - Same as collecting a tax return
 - Also coded if applicant changes data

Slide 22

NT4CM 2013 -14

Completing the FAFSA Module: Case Studies

- No case studies for 2013–14
- Consider using FAFSA demo site for late workshops

Slide 23

NT4CM 2013 -14

Student Dependency Status Module: Objectives

- Describe what makes a student independent for federal student aid purposes
- Review what happens on the FAFSA when a student does not have access to parental information
- Explain which parent's information should be provided on a dependent student's FAFSA

Slide 24

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Student Dependency Status Module

- Dependency status questions on the FAFSA
- Dependency overrides
- No access to parental information
 - Parent(s) has ceased financial support and refuses to complete FAFSA
 - Professional judgment
 - Can award unsubsidized Stafford Loans only

Slide 25

NT4CM 2013 -14

Student Dependency Status Module

- No access to parental information
 - FOTW workaround
- Who counts as a parent
 - Case studies

Slide 26

NT4CM 2013 -14

And the Number Is...Module: Objectives

- Provide participants with a broad overview of the EFC calculation for dependent students
- Introduce participants to professional judgment and its appropriate application
- Share with participants some suggestions for counseling students and their families about EFC calculations and professional judgment

Slide 27

NT4CM 2013 -14

Training of Trainers

August 16, 2012

And the Number Is...Module: EFC Calculations

- Interrelation of income, allowances, and assets
- Highlights to assist with counseling students and families

Slide 28

NT4CM 2013 -14

And the Number Is...Module: Professional Judgment

- Basics
- Situations where professional judgment is and is not appropriate
- Process

Slide 29

NT4CM 2013 -14

And the Number Is...Module: Role of Counselors and Mentors

- Need analysis
- Professional judgment

Slide 30

NT4CM 2013 -14

Training of Trainers

August 16, 2012

After the FAFSA Module: Objectives

- Help counselors under the aid process after students file the FAFSA
- Provide counselors with information to help students later in the process
- Introduce professional judgment
- Highlight the importance of establishing a good relationship with the financial aid office

Slide 31

NT4CM 2013 -14

After the FAFSA: Topics

- Using the FAFSA Completion Tool
- Reviewing the Student Aid Report (SAR)
- Making corrections
- Verification

Slide 32

NT4CM 2013 -14

After the FAFSA: Topics

- Professional judgment
- Comparing budgets and award letters
- Establishing a relationship with the financial aid office

Slide 33

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Searching for Scholarships Module: Objectives

- Describe sources of scholarship funding
- Locate free Internet scholarship research tools
- Identify potential scams

Slide 34

NT4CM 2013 -14

Searching for Scholarships Module: Search Tips

- Be organized and diligent
- Research is the key
- The Internet is not the only source of information
- Students should talk with a financial aid administrator in their area

Slide 35

NT4CM 2013 -14

Searching for Scholarships Module: Typical Internet Search

- <http://www.studentaid.ed.gov/types/grants-scholarships/finding-scholarships>
- When and how to apply
- Department of Labor scholarship search engine:
<http://www.careerinfonet.org/scholarshipsearch/ScholarshipCategory.asp?searchtype=category&nodeid=22>

Slide 36

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Searching for Scholarships Module: On-Line Search Tips

- Always use a free search
- Some search sites collect student information to advertise to the student or sell information to another company
- Always read the site's privacy statement before providing e-mail address or other information

Slide 37

NT4CM 2013 -14

Searching for Scholarships Module: Common Fraud Complaints

- Paying for guaranteed aid then not receiving it
- Paying for help to find aid then learning that free help was available
- Paying someone to file the FAFSA

Slide 38

NT4CM 2013 -14

Searching for Scholarships Module: Fraud Prevention Resources

- U.S. Department of Education resources
- Federal Trade Commission resources

Slide 39

NT4CM 2013 -14

Training of Trainers

August 16, 2012

State and Institutional Aid Module

- Provide counselors and mentors with consistent information
- NT4CM materials include templates
 - Instructor's guide
 - PowerPoint presentation
 - Participant handouts

Slide 40

NT4CM 2013 -14

State and Institutional Aid Module: Objectives

- Provide information about major state scholarships
- Provide information about major state grants
- Provide information about state prepaid tuition and college savings plans
- Provide information about major institutional aid programs

Slide 41

NT4CM 2013 -14

State and Institutional Aid Module: Sample State Grant Program

- "My State Access Grant"
- Maximum award: \$12,000 per year
- Available to state residents who are eligible for a Federal Pell Grant and who have a minimum GPA of 3.4
- Students must submit a FAFSA, an application form, and a counselor recommendation

Slide 42

NT4CM 2013 -14

Training of Trainers

August 16, 2012

State and Institutional Aid Module: Sample State Loan Program

- “My State Nursing Loan”
- Maximum annual award is \$5,000
- Available to state residents enrolled in a two- or four-year nursing program
- Students must submit a FAFSA and a state application form
- Repayment begins nine months after graduation, fixed interest rate of 6%, maximum repayment period of 10 years

Slide 43

NT4CM 2013 -14

State and Institutional Aid Module: Sample 529 Prepaid Tuition Plan

- “My State College Promise Plan”
- Anyone can contribute to an account
- An individual may contribute \$12,000 per year to lock in tuition at rate when account opened
- Contributions are deductible on state tax return
- Funds may be used at any state university in My State

Slide 44

NT4CM 2013 -14

State and Institutional Aid Module: Sample College Savings Plan

- My State Plan for College Program”
- Anyone can contribute to an account
- An individual can contribute an unlimited amount per year and account will accrue interest at 4% per year
- Contributions up to \$10,000 per year are deductible on state tax return
- Principle can be used at any college; accrued interest can be used at state schools in My State

Slide 45

NT4CM 2013 -14

Training of Trainers

August 16, 2012

State and Institutional Aid Module: Sample Loan Repayment Program

- My State Critical Fields Loan Repayment Program
- Borrowers employed in critical fields as determined by the My State Economics Office
- \$5,000 in student loans per year for up to three years; borrower must be employed in My State for one year for each year of loan repayment

Slide 46

NT4CM 2013 -14

Conclusion Module: Objectives

- Review topics covered in workshop
- Generate topics for future training
- Answer any remaining questions
- Discuss available resources
- Make counselors and mentors feel supported and appreciated

Slide 47

NT4CM 2013 -14

Conclusion Module: Accessing Resources

- Charts and handouts for students and families
- Resources to help counselors and mentors counsel students and families

Slide 48

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Middle School Modules

- Modules for
 - Counselors
 - Families
- Module objectives
 - Encourage early discussion of early financial planning for college
 - Introduce financial aid concepts and terms
 - Suggest courses of action

Slide 49

NT4CM 2013 -14

Counseling Undocumented Students about Financial Aid Module

- Statistics
- Statuses eligible for aid
- Statuses ineligible for aid
- Resources
- Counseling strategies

Slide 50

NT4CM 2013 -14

Financial Literacy Module: Objectives

- Define terms related to financial literacy
- Emphasize the importance of early awareness
- Highlight important information about paying for college, budgeting, and building credit

Slide 51

NT4CM 2013 -14

Training of Trainers

August 16, 2012

Financial Literacy Module: Objectives

- Offer tips to counselors to share with students and families
- Provide counselors with additional resources to offer students and families

Slide 52

NT4CM 2013 -14

Financial Literacy Module: Resources

- Trainers: Other NT4CM modules
- Counselors: Handout of resources for students and families regarding federal financial education materials, money and credit management, and fraud prevention

Slide 53

NT4CM 2013 -14

Questions



Slide 54

NT4CM 2013 -14

Training of Trainers

August 16, 2012