PASFAA: DEFINING OUR LEGACY: A Strategic Focus on Government Relations and Student Advocacy

‘The Pennsylvania Association of Student Financial Aid Administrators (PASFAA) is a dynamic service association whose mission is to provide training, mentoring and career support to members and other constituencies within a changing environment; to advocate for access to post-secondary education, and to educate the public on financial aid opportunities.’

As we celebrate PASFAA’s 50th anniversary, we also invite you to celebrate one of PASFAA’s legacy initiatives: government relations and advocacy!

Advocacy is one of PASFAA’s pillars of strength because of its importance to our students and members. Our strategic plan guides us with its vision and mission. Our executive council leadership framework ensures our strength of perspective and initiatives, as well as the infrastructure within PASFAA to deliver on behalf of students, the membership, and our membership institutions.

Student Advocacy
As stated within our strategic plan, legislative advocacy is identified as one of our main goals and objectives. We achieve this goal by:

A. Educating and informing members, legislators, and other external constituents on issues and concerns related to post-secondary education funding;
B. Collaborating with peer professional associations, legislators, and related agencies;
C. Inviting advocacy from students and parents by providing financial aid advocacy resources that support communications with legislators and others.

Our Goals and Objectives
The following goals and objectives guide us in our planning and operations:

A. To advocate for access to post-secondary education;
B. To understand the impact of legislation on our students, educational programs, access, affordability, retention and program completion to graduation;
C. To understand legislative issues, in order to appropriately inform, educate and influence members of Congress in support of our federal and state financial aid programs and issues related to post-secondary education;
D. To educate the membership concerning federal and state legislative, political, and regulatory matters;
E. To represent the Association to governmental and quasi-governmental agencies with respect to legislative, political, and regulatory interests;
F. To maintain visibility for PASFAA in our student advocacy role;
G. To respond to relevant Federal Notices of Proposed Rule Making and other legislative issues;
H. To develop and implement strategies to monitor and influence policy and administration of federal student aid programs;
I. To track major federal and state financial aid initiatives and propose Association position statements for the Association to make its voice heard;
J. To collaborate with peer associations to strengthen our advocacy efforts;
K. To plan and coordinate an annual Capitol Hill visit to Washington, DC to educate and inform congressional members and legislators on issues related to post-secondary education funding.

Why is Student Advocacy Important?

A. **For Our Students:** As financial aid professionals, we advocate for students in our roles within our schools. Advocacy is an integral part of the work we do and what our profession represents. Our continuing goal is to make sure that students have access to financial aid and are able to pursue and complete their college educations.

B. **For Our Financial Aid Profession:** Financial aid advocacy acknowledges to our congressional representatives the fundamental roles we play as a student advisor, educator, and expert in the administration of student financial aid. It acknowledges that we understand the strategic and tactical concepts needed to deliver our programs and services.

C. **For Members of Congress and Legislative Staff:** Our representatives in Washington need to know how legislation impacts students and educators and that we are here to partner with them as they seek to serve their constituencies.

Structure within PASFAA

Our Government Relations Committee (GRC) leads our advocacy initiatives. Our GRC is a diverse representation of our member schools and our 7 educational sectors, advocating for both undergraduate and graduate students. Our Vice Presidents’ role is to serve as the Chair of the GRC.

We support programs and services that endorse the concepts of access and affordability, persistence to degree completion and student success, funding and program efficiencies, and accountability at the government and institutional levels. Our effectiveness as financial aid professionals continues to be enhanced by our understanding of the legislative process and our ability to impact legislative outcomes in support of students.

Partnerships

Each of our GRC initiatives is important in meeting our strategic goals and building the foundation within PASFAA for sustainable and valuable student advocacy partnerships with Members of Congress and their legislative staffs. Colleges, universities and higher education partner organizations (PHEAA, NASFAA, EASFAA, PACAC, AICUP, COHEAO, and others) have historically collaborated with PASFAA for its strength and leadership in this arena.
PASFAA’s Partnership with PHEAA

Over its history, the Pennsylvania Higher Education Assistance Agency (PHEAA) has been an invaluable partner in providing support and guidance for many higher education initiatives. The strength of PASFAA’s student advocacy efforts cannot fully be recognized without giving acknowledgement to Scott Miller, Senior VP and Director of Federal Relations of PHEAA. The depth and breadth of Scott’s professional experience and legislative relationships have been invaluable to PASFAA in building and sustaining important partnerships. He has helped us to create a uniqueness among PASFAA’s collaborations and partnerships that has proven invaluable in our advocacy efforts. PASFAA remains grateful to PHEAA and in particular to Scott Miller, for his ongoing advice, deep comprehensive knowledge of both higher education and the political environment on Capitol Hill, and his guiding and supportive leadership style.

Evolution of Our Advocacy Initiatives

As we strive to strengthen our advocacy initiatives within PASFAA, we are committed to building these skills among our members. Through the efforts of Dr. Kim McCurdy, PHEAA Access Partner, and our GRC Chair, Alyssa Dobson, we recently have partnered with the Pennsylvania Association for College Admission Counseling (PACAC) to offer a PACAC/PASFAA Advocacy Leadership Credential Program (PPALC).

The PPALC program provides an opportunity for educators to learn how to advocate in Harrisburg or DC, with local, state, and federal legislators, on issues central to secondary and post-secondary education. Through a 4-part training series, PACAC and PASFAA members are given the opportunity to engage with lobbyists and industry experts, to learn how to engage our elected officials in efforts to promote policy changes. Participants receive a credential, a certificate of completion, and recognition from their respective associations. Individuals who complete the program earn an advocacy leadership certificate and have the opportunity to impact legislation by meeting with legislative representatives, a requirement for earning the certificate. The 2017-2018 inaugural program was very successful! We had 27 roundtable and 19 webinar participants with an advocacy capstone visit to Washington, DC. Five PASFAA members will receive their leadership advocacy certificates at the PASFAA 50th anniversary conference in October! More information about the PPALC program may be found on the PACAC website, http://www.pacac.org/ALC-Program.

State Advocacy has been an area of growing involvement in recent years. As our local legislators become more focused on higher education, advocacy at the state level has become an increasingly important area of focus for PASFAA. We have conducted state visits, delivered speeches on various initiatives, and written several letters regarding different bills. We hope to continue this endeavor with regard to government relations and PASFAA.

Negotiated Rulemaking has shown to be of growing importance in our advocacy efforts. As we wait for reauthorization, numerous currently legislated issues have been brought, and sometimes re-brought, to the table. PASFAA will continue to foster and encourage involvement to the greatest extent possible in this important regulatory initiative.

Our Annual Capitol Hill Visits

The GRC’s annual visit to Washington, DC is our main advocacy event. While we have addressed many topics and issues over the past 50 years with legislative staff, the following includes those topics and the offices of the members of Congress and legislative staff we have met with in past decade.
It is interesting to note that affordability, persistence to degree completion and student success, funding and program efficiencies, accountability at the student and institutional level, aid simplification and consumer transparency, are reoccurring themes.

We remain grateful to Megan McClean Coval, NASFAA’s VP of Public Policy and Advocacy, who annually, at the beginning of each of our visits, provided us with invaluable insights and a comprehensive overview of issues from the perspective of those on Capitol Hill.

2018: Issues
1. The PLUS Loan Program: Grad and Parent PLUS: the importance to retain them;
2. Simplification: The FAFSA (including continued use of data retrieval tool (DRT) and elimination of loan origination fees;
3. Federal Pell Grant Program: protect any surplus;
4. Deregulation: Return to Title IV (R2T4), Gainful Employment (GE) programs, and removal of the 150% time limit for subsidized loans;
5. The Prosper Act;
6. Campus Based Programs: Retain in its current form;
7. Financial Literacy: Increase and make financial literacy education mandatory;

2018: Legislative Staff and Directors from the Following Committees and Offices of: House Committee on Education and the Workforce, Majority Staff, Representative Glenn Thompson, Representative Lloyd Smucker, Representative Brandon Boyle, Representative Costello; Representative Charlie Dent; Senator Bob Casey; Senator Pat Toomey; Senate Committee on Health, Education, Labor and Pensions (HELP), Majority Staff

2017: Issues
1. Simplification and Deregulation: FAFSA Simplification and removing several overly burdensome regulations and processes;
2. Pell: Protect Pell and year-round Pell;
3. Direct Loans: Retain the Grad PLUS program, increase aggregate and annual loan limits, eliminate student loan origination fees and reduce student loan interest rates.

2017: Legislative Staff and Directors from the Following Committees and Offices of: House Committee on Education and the Workforce, Majority Staff; Representative Lou Barletta; Representative Lloyd Smucker; Representative Brendan Boyle; Representative Costello; Representative Charlie Dent; Senator Bob Casey; Senate HELP Committee, Majority Staff; Senator Elizabeth Warren

2016: Issues
1. Simplification;
2. Retaining the campus- based aid programs;
3. Year-round Pell;
4. Standardized award letters;
5. Tax treatment of loan forgiveness;
6. No cap for Direct Plus loans;
7. Returning federal funds for graduate students;
2016: Legislative Staff and Directors from the Following Committees and Offices of: Office of Students, CFPB; Representative Mike Kelly; Representative Ryan Costello; Representative Lou Barletta; House Committee on Education and Workforce, Majority Staff; Representative Charlie Dent; Senate HELP; Committee, Majority Staff; Senator Bob Casey

2015 Issues
1. Financial aid simplification;
2. Elimination of the federal Direct Loan origination fee;
3. Year-round Pell;
4. Non-standardized award letters;
5. No cap for PLUS Loans;
6. Continue the Perkins Loan program;
7. Financial literacy.

2015: Legislative Staff and Directors from the Following Committees and Offices of: House Committee on Education and the Workforce, Majority Staff; Representative Glenn Thompson, Katie Brown and Matthew Brennan; Senator Robert Casey; Senate HELP Committee, Majority Staff; Jeff Appel, Deputy Under Secretary, U.S. Dept of Ed; Office of Representative Fattah; Representative Charlie Dent; Office of Lou Barletta.

2014 Issues:
1. Pell Grant Program: Early awareness, access and affordability; Pell Well, Pell Promise and Super Pell;
2. Changes in Need Analysis: To use prior prior year Income to more accurately measure EFC;
3. Federal Student Loans: Limit loan amounts for certain students;
4. Private Student Loans: Endorse concepts in the Know Before You Owe Act;
5. Graduate Student Loan Issues;
6. Student Loan Repayment Issues:
   a. Simplify loan repayment programs;
   b. Concerns about increasing student loan debt;
   c. Limit but maintain public service loan forgiveness (PSLF) program;
7. Financial Literacy:
   a. Provide students with knowledge and tools to navigate financial responsibility;
   b. Early awareness programs in high schools and in colleges;
   c. Delinquency prevention;
8. Award Letters and Consumer Information: Transparency and disclosure for positive impact on affordability.

2014: Legislative Staff and Directors from the Following Committees and Offices of: House Committee on Ed and the Workforce, Majority Staff; Office of Representative Scott Perry; Office of Representative Tom Marino; Office of Representative Lou Barletta; Office of Representative Mike Kelly; Office of Representative Allyson Schwartz; Office of Representative Fattah; Representative Charlie Dent; Michael Pierce CFPB; Robert Moran, Senate HELP Committee, Minority Staff; Representative Glenn Thompson.

2013 Issues:
1. Student loan interest rate proposals, long term proposals;
2. The impact of federal loan changes on private loans;
3. The importance of financial literacy and educating the student and parent;
4. Repayment plans: Simplify them;
5. Parent PLUS loan interest rates;
6. Private Loans: Understanding borrower benefits and the overall cost of the loan;
7. Transparent consumer information.

2013: Legislative Staff and Directors from the Following Committees and Offices of: House Education and the Workforce Committee, Minority Staff; Representative Allyson Schwarz; Representative Keith Rothfus; Representative Bill Shuster; Representative Charlie Dent; Representative Mike Kelly; Representative Lou Barletta; Senator Bob Casey; Senate HELP Committee, Majority Staff; Senate Appropriations Sub-Committee on Labor, HHS, and ED, Majority Staff.

2012 Issues:
1. CFPB Initiatives: the shopping sheet, scorecard and private loans, and consumer issues;
2. Student loan Interest rates increase;
3. Loss of graduate student interest subsidy and impact;
4. Sustainable solutions to provide low-cost federal loans to students and parents;
5. Federal student loans vs private loans comparisons;
6. The Know Before You Owe Act of 2012;
7. College costs.

2012 Legislative Staff and Directors from the following committees and Offices of: Representative Todd Platts; David Bergeron, Office of Postsecondary Education; Office of Tom Marino; Representative Allyson Schwartz; Education Policy Advisors from the Senate HELP and House Education and the Workforce Committees

2011: Issues:
1. Need analysis formula changes;
2. Pell Grant: Continued bi-partisan funding support;
3. Federal loans: Remaining competitive with private loans; interest subsidies;
4. Administrative burden: streamline the financial aid process;
5. New federal loan initiatives: loan consolidation FFELP and DL; income-based repayment plan.

2011 Legislative Staff and Directors from the Following Committees and Offices of: Education Policy Counsel, House Ed and the Workforce Committee; Representative Mark Critz; Representative Mike Doyle; Representative Mike Fitzpatrick; Representative Charlie Dent; Representative Mike Kelly; Representative Jason Altman; Representative Lou Barletta; Representative Jim Gerlach

Articles we have written: legislation we have addressed:

1. Jan 2011: Letter to the Consumer Financial Protection Board (CFPB) in response to the private education loan market. Our comments were included as part of a Bloomberg BNA Banking Report article: Comments Provide Clues of Future CFPB Oversight of Private Student Loans, May 2012
2. July 2011: Letter to Members of Congress regarding the debt ceiling and Pell Grants
3. **Jan 2012**: Letter to the CFPB to address the scope and use of private loans.

4. **May 2012**: Provided feedback to the office of Representative Allyson Schwartz about Senator Durbin’s “Know Before you Owe” private student loan act.

5. **March 22, 2013**: Letter to Monica Jackson, of the CFPB, regarding private loans (the student experience, financial literacy, legislation, the Durbin-Harkin “Know Before You Owe Act,” refinancing and servicing delivery options, etc.).

6. **Nov 3, 2013**: Letter to The Honorable Tom Harkin, Chairman of the Committee on Health, Education, Labor and Pensions (HELP), , and Senator Lamar Alexander, Ranking Member of the HELP Committee, regarding our recommendations on the re-authorization of the Higher Education Act (HEA) including discussion on affordability from the perspective of Pell Grant eligibility, consumer information, and clarify important purchasing data points such as net price, need analysis, student loans issues and financial literacy programs.

7. **November 21, 2013**: The PASFAA GRC responded to the Office of Representative Allyson Schwartz’ inquiry regarding our position on the reintroduction of the *Know Before You Owe Act*. It is an honor for any of our PA delegation to follow up with PASFAA, which is often the case, when determining their position and message to send to their constituencies.

8. **April 24 2014**: We sent a letter to Senator Durbin with recommendations on the *Know Before You Owe Act*, to include:
   a. Requiring institutional loan certification;
   b. Legislation to increase consumer awareness of the overall cost of education loans, requiring lenders to provide students with options for electronic communications, to inform while enrolled, about the cost of loans they are borrowing;
   c. The Department of Education and the CFPB schools’ assessments to measure the effectiveness of the use of school certification in lowering private student loan debt.

9. **Sept 2, 2014**: We sent a letter to Jared Solomon, Office of Senator Bob Casey, to address FAFSA simplification in order to increase access and affordability, increase the number of students applying for federal aid, targeting those most in need and increased college enrollments.

10. **2015**: We drafted a letter in support of FAFSA simplification. During this year, simplification was the topic on everyone’s agenda. This letter was written in support of NASFAA’s report on FAFSA simplification and was used to further solidify the findings and express our support of the findings.

11. **August 2015**: We drafted a letter in support of the Perkins program. As the Perkins program was facing its planned sunset, we used this letter to advocate broadly in numerous forums.

12. **October 2015**: We created a letter in support of Pennsylvania SB760, the PA Dream Act. This was to support the idea that our undocumented students could have access to the PHEAA state grant. This was used with our state advocacy efforts.
13. May, 2017: We sent a letter to Congress regarding the importance to of the campus-based financial aid programs.


15. March 2018: We sent a letter expressing our concerns with Pennsylvania HB2124, commonly known as the loan debt letter law. This was used with our state advocacy efforts.

16. April 2018: We sent a letter to Charlie Dent upon his retirement. In this letter we sent our congratulations and thanked him for his time and support of our issues.

The NASFAA Leadership and Legislative Conference and Expo
This conference is designed to provide newly-elected state and regional association leadership with the tools needed to effectively govern their associations and to provide an opportunity for association leadership to visit with congressional representative on topics of importance to PASFAA. Topics of discussion have included defining the association, effective communication, financial management, outreach, student advocacy initiatives, long range strategic planning and team building. “A Day on Capitol Hill” gives participants the unique opportunity to interact with lawmakers and staff to advocate on behalf of their students.

We highly recommend that other executive council members, as authorized by PASFAA, participate in this important and extremely relevant leadership training initiative, to further advance the mission of PASFAA.

Please join us as we celebrate PASFAA and our successes during our 50th anniversary year!

Membership Information: https://pasfaa.org/docs/memberservices/MembershipBrochure.pdf
Membership Application: https://pasfaa.org/docs/forms/memApp.html
General Information: https://pasfaa.org

Additional Information:

- Linda M. Anderson, PASFAA Chair, Communication Committee (linda.linda.anderson33@gmail.com);
- Alyssa Dobson, VP and Chair of the Government Relations Committee and President-Elect, (alyssa.dobson@sru.edu) or;
- Betty Casale, PASFAA President, (casale@cmu.edu).