Trusted Advisors to the Financial Aid Community

WIIFY: NASFAA Business Services

2019 CASFAA Annual Conference

November 2-5, 2019
Materials and Limited Rights

Blue Icon will provide the Institution with an electronic copy of the relevant project materials (e.g. training documents, project templates). The Institution may, at its own expense, provide participants with paper copies if it chooses. The school may share the electronic or print version of the materials with current employees and future employees once they begin employment. The institution agrees not to distribute materials to anyone who is not an active member of the staff at the time the materials are shared. Permission to share materials outside of the institution must be obtained in writing from Blue Icon Advisors.

What is NASFAA Business Services?
What is Blue Icon Advisors?
Trusted Advisors to the Financial Aid Community

Why did NASFAA Launch Blue Icon?
- To provide valuable services schools want and need:
  - Consulting
  - Leadership support
  - Compliance services

"Sometimes you need an outside, trusted advisor with specific expertise to help clarify an issue and create a path forward. Blue Icon offers that support."

Justin Draeger, NASFAA President and CEO
What can Blue Icon Do?

- Policies and procedures upload, evaluation, and writing
- Compliance assessment
- Operations review
- Customized training
- Management/Leadership consultation
- Customer service evaluation
- Strategic planning facilitation
- Enrollment management
- Interim staffing assistance
- New aid director coaching
- Custom projects

What is the SOE Program?

Full-scale Compliance and Operations Review

“SOE reviews are a great opportunity for schools to address issues before an audit or program review, reducing the potential that compliance issues will be found and liabilities assessed.”

Brad Barnett, SOE Reviewer
What is the SOE Program?

How can SOE Help Schools?
- Maintain resources for current efforts
  - Strengths
- Justify stated position
  - Compliance exceptions
- Gain momentum for change
  - Recommendations

How do Blue Icon and SOE Compliment Each Other?
Who Performs the Work?

- Currently practicing and/or highly experienced aid administrators
- NASFAA backs the work of both Blue Icon and SOE
- Both programs leverage NASFAA resources
- All reports reviewed by NASFAA staff

How can NASFAA Business Services Help Me?

What are Your Next Steps?

www.blueiconadvisors.com  www.nasfaa.org/SOE
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