

36th Annual Conference
The Penn Stater
Conference Center Hotel
October 17-20, 2004

FEATURES

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- The Quiet Diplomat
- So, You're New in Financial Aid?
- PELA News
- Sector and Committee Reports

2003-04 PASFAA EXECUTIVE COUNCIL

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Editor Excerpts

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2. PUBLICATION SCHEDULE

Articles, position openings, meeting dates or other items can be submitted to the Editor according to the following publication schedule:

Summer 2004 issue:	articles due May 15
Fall 2004 issue:	articles due July 15
Winter 2005 issue:	articles due November 15
Spring 2005 issue:	articles due February 15

3. IMPORTANT MESSAGE

The opinions by individuals who contribute to the newsletter do not necessarily represent the position of PASFAA.

PASFAA Potpourri

1. MOVING? CHANGING POSITION OR TITLE?

PASFAA membership belongs to the individual, not the institution. All changes in name, address, title, etc. should be submitted to Gary Means, Financial Aid Office, Westmoreland County Community College, 400 Armbrust Road, Youngwood, PA 15697 or meansga@wccc.pa.edu. For 2003-04, the membership list is maintained at Westmoreland County Community College.

2. 2003-04 PASFAA COMMITTEES

Government Relations	David Smedley
Membership	Bob Thorn
Association Governance	Bob Thorn
Public and Professional Information.....	Kimberly McCurdy
Technology Advisory Group	Ruth Brouse
2004 Conference.....	Donna Wilkoski
Financial Aid Training	Cindy King
Financial Aid Awareness	Mirtha Wilczynski
Finance and Development	Mary Kosin

3. MEMBERSHIP IN PASFAA

Subscription to the PASFAA Newsletter is included in your yearly membership fee. Contact Gary Means, Westmoreland County Community College, for information about 2003-04 PASFAA membership.

4. LETTERS TO THE EDITOR

Readers are invited to express their concerns about PASFAA or any financial aid related issues. Opinions, suggestions, questions, etc. are welcome. Letters must be signed. The Editorial Board reserves the right to condense or edit if necessary.

5. PASFAA HOME PAGE

Visit our World Wide Web site at: www.pasfaa.org
ATAC liaison and website contact: Gary Means,
meansga@wccc.pa.edu or (724) 925-4061.

Letter from the President



Dear PASFAA Colleagues:

I was recently watching my youngest son compete in a basketball foul-shooting contest. He nailed a perfect ten out of ten, so I started to relax thinking he had this one in the bag. But then he missed his next three attempts! The nervous mother in me panicked as he stepped back a few feet from the line and hung his head in disappointment. Just when I started to think that the pressure was too much for him and he was going to walk off the court, he calmly walked back up to the line and sunk the next 12 shots for a total of 22 out of 25 giving him the win for his age division and advancement to the regional competition. I confessed to him later that I thought he was giving up when he backed away from the line. He assured me that it never even occurred to him, but he knew that if he didn't step back to end that "contest" in his head, his inaccurate shooting might continue. "I knew if I put those three misses behind me and thought about the next 12 shots as a new contest, I had a better chance of finding my "sweet spot" again and making them," he told me. Pretty smart for a 12-year old, don't you think?

I've decided this spring to use my son's approach and think of the 2004-05 processing cycle as my "new contest". I am resolving to not let the thought of last year's backlogs, budget shortfalls, understaffing, and procrastinating financial aid applicants hinder my enthusiasm for this year's packaging season or tarnish the ideals of our profession. Spring is a time for renewal, so what better time to remind ourselves that each financial aid package we offer is an opportunity for a student to achieve his/her educational goal and realize a dream. We are all winners in this "contest" when we help make our students' dreams of achieving a higher education come true.

Remember that PASFAA is here to assist you with this admirable endeavor. In this issue of the Newsletter, you can read about some of the many successful programs that the PA Financial Aid Training Committee has presented over the past few months including the High School Counselor Training Series and the Support Staff Training Workshops. I want to thank everyone who volunteered and participated – those who gave and those who received – to help make these programs so successful.

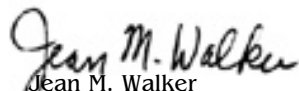
Hopefully, you have made plans to attend PASFAA's annual Spring Training. In the West, the training is being held April 14 at the Marriot Pittsburgh North at Cranberry Woods. In the East, the training is April 20 at the Drexelbrook Catering & Corporate Conference Center in Drexel Hill. Spring Training always offers us informative sessions and is yet another example of how your PASFAA membership works for you by offering you learning and networking opportunities.

By now I'm sure you have all had the opportunity to visit our new and improved website that was unveiled in February. I have received very positive feedback regarding its user friendliness and its diverse functionality. Gary Means, Council's liaison to ATAC, our website development firm, the Technology Committee, and Paula Gordon of ATAC, all deserve a big thank you for all their hard work and dedication in making the conversion possible. The registration for Spring Training served as our test for on-line registrations, and the success we had with it makes us confident that the registration process for the annual conference will go just as smoothly.

Watch for details during the next few months concerning PASFAA's first-ever electronic election! We are excited that the new website will allow us to hold on-line, electronic balloting. The website's membership management system will allow us to keep a much cleaner, up-to-date membership directory, but only if members are diligent about updating their membership profile. New features and updates made to the website will be ongoing, so plan to visit the website often and consider it your best source for receiving news and information about PASFAA and its members. Also, remember to review and update, if necessary, your membership profile during each visit!

As always, I welcome your suggestions, comments, and questions regarding PASFAA and in particular, the new website. Happy spring everyone, and I hope you have your best "new contest" ever!

Sincerely,


Jean M. Walker
PASFAA President

Nominations Requested for PASFAA Awards

Submitted by
Bob Thorn
Past President

Nominations are being sought from the membership for PASFAA's Distinguished Service Award, Honorary Life Membership, and Emerging Leader Award. Nominations must be received by May 3, 2004.

The **Distinguished Service Award** is presented to those individuals who have made significant contributions to the Association through leadership, activities, and/or research in financial aid. This award recognizes service to PASFAA over a period of time in the profession of financial aid and is not recognition for any single event or activity. The 2003 recipient was Bonnie Behm, of Villanova University, for her long tenure of service and leadership to PASFAA. A committee of past recipients and the PASFAA President will review nominations and recommend to Council their choice.



Honorary Life Membership is given to individuals who have made outstanding and sustained contributions to the financial aid profession. This honor is not necessarily awarded each year and is not restricted to PASFAA members. PASFAA Council is responsible for the final selection. The 2003 recipient was George Murdoch, the first President of PASFAA, in recognition of his vision and the leadership he provided during the early years of our organization.



The **Emerging Leader Award** is given to those individuals who, within about five years of entering the financial aid profession, have demonstrated concern, service and commitment to the needs of PASFAA and its projects. Nominees for this award must be current regular or associate members and will be contacted to complete a form to provide information concerning their involvement in PASFAA. Council will review the nominees and select the recipient at the June meeting. Last year's recipient was Donna Cerza from College Misericordia.

Nominations for the above listed awards should be submitted by email to thorn@cup.edu or by mail to Robert Thorn, Director of Financial Aid, California University of Pennsylvania, 250 University Avenue, California, PA 15419.

Recognition Program Looking for Retirees

Submitted by
Jean Walker
PASFAA President

PASFAA implemented the Retirement Recognition Program to acknowledge individuals who have served our profession for many years. This special recognition acknowledges current PASFAA members (regular or associate) who have given 25 years or more of service to students, families, colleagues, and their institutions or organizations in any area of student financial assistance and/or post-secondary education financing.

Please help me identify these special individuals. If you or one of your colleagues with 25 years or more of service has retired or plans to retire during the 2003-04 academic year, please notify Jean Walker, PASFAA President, before June 30 at jean.walker@bc3.edu. PASFAA will formally recognize all individuals qualifying for this special recognition at the 2004 annual conference in October at the Penn Stater Conference Center.



National Student Employment Week April 11-17, 2004

Remember to recognize your student employees!

Nominations for 2004-05 PASFAA Council Due May 15

Submitted by
Bob Thorn
Past President

At this past year's conference, the membership passed a resolution that requires our election results to be completed no later than August 15 of each year. This by-law change was done to accommodate our move to a web-based voting process similar to the models used by EASFAA and NASFAA. To support this new initiative, PASFAA must significantly change our timeline for securing nominations from the membership. The new timeline for our nomination and voting process is:

- **May 15** Last date to secure nominations and biographical information from candidates.
- **July 15** Electronic voting via the PASFAA homepage will open.
- **August 1** Last day to vote.
- **August 15** Notification of election results to membership.

I encourage everyone to participate in the nomination process of our organization. Positions open for 2004-05 include President-Elect, Vice President, Treasurer, Secretary and At-Large Sector Representative. Active members from any sector may make nominations for all positions. You can download the nomination form from our PASFAA homepage. Brief job descriptions are listed below; full job descriptions, duties and a nomination form are available on the PASFAA web site (www.pasfaa.org). The completed nomination form must be returned to Bob Thorn by May 15.



President-Elect (Three Year Commitment)

The President-Elect shall assist the President and in all ways prepare for the Presidency, and serve as Past-President after the presidential term. The President-Elect shall serve on the Finance and Development Committee, and shall nominate:

- An active member to serve as annual Conference chairperson, and
- An active member to serve as Finance and Development Committee chairperson, and
- A chairperson of the Training Committee

President

The President shall preside at all meetings of the Executive Council and of the Association; shall perform other duties as they pertain to the office of the President; shall be a member, ex officio, of all committees; shall submit an annual report to the Association.

Past-President

The Immediate Past-President shall provide such assistance to the President as is appropriate and shall serve as the Chairperson of the Membership and Elections Committee. In the absence or disability of the President, the immediate Past-President shall have all the powers and shall perform all the duties of the President.

Vice President (Two Year Term)

The Vice President shall serve as Chairperson of the Government Relations Committee and shall perform such other duties as are appropriate to the office.

Treasurer (Two Year Term)

The Treasurer shall be responsible for the fiscal records of the Association and of the Executive Council, and perform such other duties appropriate to the office as the Executive Council may direct. The Treasurer shall be responsible for receiving and disbursing all monies of the Association under policies approved by the Executive Council and shall keep adequate and appropriate records of such receipts and disbursements. The Treasurer shall be ready whenever required to turn over to the Council all monies, record books, papers, vouchers, and other records pertaining to the office, and shall turn the same over to a successor when appropriate. The Treasurer shall submit an audited annual report to the Association.

Secretary (Two Year Term)

The Secretary, or designee, shall assume the responsibility for coordinating the editing, publishing and circulation of the Association's newsletter. The Secretary, or designee, shall also notify the members of any regularly scheduled meeting at least two weeks prior to such meetings, and shall

serve as Chairperson of the standing committee for Public and Professional Information. The Secretary shall be responsible for the recording of the minutes of the Executive Council and Association meetings.

At-Large Sector Representative (Two Year Term)

The At-Large Sector Representative is nominated by, elected from, and represents the active membership and serves on the Executive Council.

Download the PASFAA Nomination form from the PASFAA homepage or use the following form:

PASFAA 2004-05 Nomination Form

Due May 15, 2004

President-Elect	Name: _____
	Institution: _____
Vice President	Name: _____
	Institution: _____
Treasurer	Name: _____
	Institution: _____
Secretary	Name: _____
	Institution: _____
At-Large Sector Representative	Name: _____
	Institution: _____

I hereby certify that I am an active member of PASFAA for the 2003-2004 administrative year. I further certify that I have discussed these nominations with the nominees indicated above and each nominee has agreed to serve the Association in the respective office, if elected.

Signature: _____ Print Name: _____
Institution: _____ Date: _____

Send this form by May 15, 2004 to Bob Thorn, Director of Financial Aid, California University of PA, 250 University Avenue, California, PA 15419 or fax to Bob at 724-938-4551.

Technology Advisory Group

Submitted by
Ruth Brouse, Chair
Technology Advisory Group

The Technology Advisory Group submitted recommendations to Council in regards to the conversion of the PASFAA website. The committee suggests that the development of forms, revision to current web pages, addition of new web pages and information sharing with the membership may need to be more than just the responsibility of the liaison to ATAC. The committee recommends ongoing communication to the membership through the list serve and the PASFAA newsletter to keep members abreast of changes and to solicit constructive feedback. The committee stands ready to assist in making suggestions and providing support to facilitate the transition to the revamped website.



Updates are being made to the Resource Guide. The group's goal is to have the guides to the printer and ready for use by mid-August. Due to the overwhelming request for Resource Guides, we will again make the guides available to all members this year. Copies of the 2004 PASFAA Resource Guide can be ordered and shipped directly to your institution for a fee. Further information will be sent via the list serve when details have been finalized.



Pennsylvania Financial Aid Training Program

Submitted by
Cindy King, Chair
PFAT Committee

Spring and summer training opportunities for PASFAA members will again be offered through the cooperative effort of PASFAA and AES.

Spring Training is "Planting the Seeds for Tomorrow"

April 14, 2004: Pittsburgh Marriott North at Cranberry Woods

April 20, 2004: Drexelbrook Catering & Conference Center, Drexel Hill

Don't miss this year's Spring Training seminars! Not only do we have our very own wise and experienced financial aid associates presenting, but also a number of famous and highly regarded guests! You can select from sessions on professional development to federal, state, and AES updates. Greg Martin, Training Specialist, from the U.S. Department of Education is always good for "hot topics" relevant to your operations.



We are fortunate this year to have a special guest. Mark Kantrowitz, publisher of the FINAID-L list serve and director of advanced projects for FastWeb, has agreed to offer a session on need analysis. The award-winning FinAid.org site was established in 1994 as a public service and has grown into the most comprehensive annotated collection of information about student financial aid on the web. Mark's commitment to financial aid has netted him several awards and honors including a NASFAA Meritorious Achievement Award and a special award from the College Board. His impressive background includes B.S. degrees in mathematics and philosophy from MIT and a M.S. degree in computer science from Carnegie Mellon. Currently, he is completing work on his Ph.D. in computer science from Carnegie Mellon University.

Don Raley Institute

June 14-18, 2004: Dickinson College, Carlisle, PA



This summer will be the 23rd year that the Don Raley Institute has provided the opportunity for financial administrators with less than two years experience to benefit from in-depth training materials and instruction offered by seasoned faculty. Not only will participants come away with a wealth of information but also a network of contacts within the financial aid community. It's not all bookwork and lectures! Special attention has been given to evening activities for participants and faculty members to blend the weeklong institute into an experience of casual learning and fun. This year's faculty who generously offer their time and professional observations is:

- Bill Hoyt, Director of Financial Aid, Consolidated School of Business
- Melissa Ibanez, Director of Financial Aid, University of Pittsburgh-Bradford
- Carolyn Julian, Student Aid Advisor, Penn State University-Harrisburg
- Ryan Hannigan, Financial Aid Counselor, Messiah College

Financial Aid Basics

June 14-16, 2004: Dickinson College, Carlisle, PA

It only comes around every other year! Do you know of anyone who could benefit from a basic foundation of financial aid administration? Well this is the year for the two and a half day seminar for your colleagues who are not part of the financial aid office. This workshop is geared for non-financial aid office personnel in areas such as the business office, the admissions office, or lending institutions. Participants will be provided with the latest information on program changes and issues confronting the administration of financial aid. We are grateful to time and energy commitment from this year's faculty:



- Holly Kirkpatrick, Assistant Director of Enrollment Management, Arcadia University
- Michael Grossman, Certified Financial Planner, Norristown Bell Credit Union



WASHINGTON UPDATE

Submitted by
Scott Miller
Federal Relations
Director, AES/PHEAA

President's Budget Request Includes Some Reauthorization Ideas

On February 2, 2004, President Bush released his Budget Request for the 2005 Fiscal Year. The budget includes all of the usual items, including proposals to level-fund most student aid programs for the coming fiscal year. But, it also includes a preview of the Administration's priorities for the upcoming reauthorization of the Higher Education Act. While only minimal detail is provided on these ideas, the Budget Request represents the first time that the Administration has gone on record regarding the reauthorization. It is conventional wisdom that the Administration's support is crucial if reauthorization is to be completed, as scheduled, in 2004.

What's



**on the
Hill?**

The Numbers

Overall, the budget calls for the Federal Government to spend \$2.4 billion in FY 2005. Most of the "new money" in the budget proposal is directed towards defense and homeland security initiatives. The President proposes to increase education spending by approximately 3%. Funding for most of the individual student aid programs is held at current levels, although the budget proposes to eliminate funding for new Federal Capital Contributions for the Perkins Loan Program and for the LEAP program. Both of these notions have been included in numerous Presidential Budget Proposals over the past ten or more years.

Below are the proposed funding levels for the student aid programs:

SFA PROGRAM	FY 2004 ACTUAL	FY 2005 Proposed by the President
Pell (maximum award)	\$4,050	\$4,050
SEOG	\$770.5 million	\$770.5 million
FWS	\$998.5 million	\$998.5 million
Perkins Loans Capital Contributions	\$100 million	\$0
LEAP	\$66.6 million	\$0
GEAR-UP	\$298.2 million	\$298.2 million
TRIO	\$832.6 million	\$832.6 million



In addition, the Administration is proposing to spend \$33 million on an enhanced Pell Grant program that would provide an additional \$1,000 for Pell-eligible students who have completed a State Scholars curriculum in high school. Fourteen states currently participate in the State Scholars program, which specifies "demanding" curriculum requirements for students and is aimed at helping ensure student success in postsecondary education.

Reauthorization Proposals

As indicated, the Administration included in the Budget Proposal some general proposals for the reauthorization. Among these proposals are:

- Retain the variable interest rate structure for FFELP and FDLP loans after July 1, 2006;
- Increase loan limits for first-year students from \$2,625 to \$3,000;
- Revise the campus based allocation formula to reflect, more accurately, the need for funds.
- Broaden the availability of extended repayment options for student loans;
- Allow low-default schools more flexibility in disbursing loan funds (i.e., reinstate the exception from two loan disbursement provisions that has expired);
- Clarify that student aid applicants who have been convicted of a drug-related offense are only ineligible for Federal student aid if the offense was committed while they were attending school;
- Strengthen the financial stability of the FFEL system by requiring guaranty agencies to collect the currently optional 1% insurance premium on all loans;



President Delivers State of the Union

President Bush makes a point during his January 20 State of the Union address to a joint session of Congress.





The president's comments draw applause from (left) Vice President Dick Cheney and House Speaker Dennis Hastert of Illinois.

- Phase out higher special allowance payments for loans funded with the proceeds of certain tax-exempt securities; and
- Reserve \$3 billion for unspecified further student benefits. These additional proposals – which could include reduced fees, default prevention activities, or additional loan limit increases – will be developed in consultation with Congress as part of the HEA reauthorization process.

While not specifically listed as a reauthorization proposal, the Administration reiterated its support for matching FAFSA data with tax data held by the IRS.

If there ever was a time to make your views known on student aid funding for FY 2005 and on the reauthorization of the Higher Education Act, that time is now! Congress is working with a very short calendar this year and hopes to move quickly on appropriations and budget matters. The House of Representatives is hoping to finalize its reauthorization bill before summer and the Senate is hoping to meet a similar schedule. As a reminder, Senator Arlen Specter (R-PA) is the chairman of the Senate Appropriations Subcommittee on Labor, Health and Human Services, and Education and, thus, has a great deal of influence on the ultimate funding decisions. Please contact your Members of Congress and Senators to express your views.



Senator Arlen Specter (R-PA) discusses increases in spending for education at a recent appropriations subcommittee hearing.

Workers Needed to Keep Building PASFAA

Submitted by
Margaret F. Hynosky
Institutional At-Large
Sector Representative

Building a new web site is a great undertaking. Volunteers are the foundation of PASFAA and without volunteers like you, there would not be a new web site and we would not be building a better organization for all of us. If you want to get involved in PASFAA or maybe further your volunteerism, this is your opportunity!

Included in this issue of the Newsletter is a lot of great information on the new web site. Make sure you check it out and update your profile information during your first visit and again during any subsequent visits (if any information in your profile has changed).

After updating your profile, let PASFAA know your volunteer interests by clicking on "Volunteer" and log in again if prompted. Scroll to the bottom of your profile and click on "Continue". Select up to three volunteer areas. Please indicate your first preference as your first choice and so on.



Not sure if you want to serve on the Financial Aid Awareness Committee or be a member of one of the Training Subcommittees? No problem! Detailed descriptions for each committee are also on the web site. If you're not sure about your readiness and need a little extra boost of confidence, contact me or any other member of Council or the chair or a member of the committee you are interested in and learn more about volunteering for PASFAA.

PASFAA's committees include:

- Training Subcommittees:
 - Fundamentals Workshop
 - High School Counselor Workshop
 - Support Staff Workshop
 - Teleconference
 - Spring Training
 - Don Raley Institute (for beginners)
 - Financial Aid Basics
 - Intermediate Summer Institute
- Conference Committee
- Government Relations Committee
- Financial Aid Awareness
- Finance & Development
- Public & Professional Information (Newsletter)
- Technology Advisory Group



Please update your volunteer preferences by **May 1, 2004**. Committee chairs will be reviewing the lists of volunteers and setting up next year's committees shortly thereafter. And thank you for helping build a better PASFAA!

Support Staff Workshops "Support" Front-Line Staff

Submitted by
Marguerite Borst, Chair
Support Staff Workshop Training

Support staff personnel in Financial Aid Offices are usually the "front line" in helping students and families with their financial aid questions and problems. With that in mind, the Support Staff Training Committee's goal was to develop a syllabus that would provide useful tools and resources enabling support staff in financial aid to serve their students more capably. Topics such as information and updates on the 2004-05 FAFSA, student and school access to NSLDS, AES Student and School Portals, and FERPA were included.



Marykay Klara (left) and Annette Kelly were presenters at the Delaware County Community College site.

The committee also anticipated that participants would have a wide range of experience – from the neophyte to the 20-year weathered veteran. To bridge that gap, the Committee created an interactive format for its material, allowing an exchange of ideas, stories, and questions among the attendees. Particularly successful was a module on customer service. The first part of the workshop allowed participants to collaborate on solutions to assigned problems. Afterwards, time was allocated to allow for open discussion of real-life experiences and practical advice for solving difficult situations.



Melissa Ibanez hams it up while she serves as a presenter at the Gannon University site.

The total attendance at the workshops was 112. Participant evaluations reported overall very positive ratings of the program. Approximately 95% said that the training either met or exceeded their expectations. The

workshops were held December 2003 at the following sites:

• Luzerne County Community College



Participants at the Gannon University site engage in small group discussion.

- Gannon University
- Community College of Allegheny County
- Delaware County Community College
- Harrisburg Area Community College-Lancaster Campus

Thanks to the following Support Staff Training Committee members for their hard work in making this a successful training experience for the front-line financial aid staff:

Marguerite Borst (Chair)
Ginger Kline (Co-Chair)
Michael Burke
Vicki Cantrell
Valerie Carles
Donna Cerza
Nancy Chalker
Mary Gazal
Melissa Ibanez
Annette Kelly
Marykay Klara
Heather Kuhn
Kimberly McCurdy
Dana Suter



Attendees at the Community College of Allegheny County location break for lunch and conversation.

Support Staff Seminars



December, 2003



Presenters and participants took time out for a group photo at the Luzerne County Community College site.

A special thanks is extended to the members of PELA for the contributions of giveaways to the Support Staff Workshops. These treats really made the Workshops special for our participants.

Awareness Committee Wrapping Up Annual College Fairs

Submitted by
Mirtha Wilczynski, Chair
Financial Aid Awareness Committee

We are all busy preparing for the upcoming year's aid packaging. Let's not forget that we are also committed to provide information to those students who will be applying for admissions starting in the fall term and who will no doubt be applying for financial aid. We want to make sure that they get all the information they need to help them realize that there are funds available to assist them with their college expenses.

Upcoming scheduled college fairs to round out this academic year are:

- May 3 Northeast Fair Wyoming Seminary
- May 4 Main Line Fair Villanova University



Arlina DeNardo explains institutional methodology at the NCC college fair.

2004-2005 PACAC regional fairs have been scheduled to start again in September. Once more we will be calling on you to volunteer your services and assist students and parents who approach us at the PASFAA tables.

Please consider volunteering a few hours of your time to man a financial aid table or to speak at a college fair seminar when you are asked or contact the Awareness Committee to volunteer.



Joan Holleran covers sources of aid at the Northampton Community College college fair.



Cindy King reviews the verification process with NCC college fair attendees.

PASFAA & PELA at Pittsburgh College Fair

Submitted by
Jim Cardinale, Regional
Manager, AES/PHEAA

This year's National College Fair was held February 26-27 at the David L. Lawrence Convention Center in Pittsburgh. The Pittsburgh fair has traditionally been the second largest NACAC event in the country. Thanks to the following PASFAA volunteers who manned the financial aid booth and provided valuable financial aid information to families:



Rick Sparks (center) and Cheryl Rettman helped families at the financial aid table.

Tiffany Aloï
Thomas Ball
Glenn Beech
Brittany Benten
Aileen Bowman
John Cairns
Jim Cardinale
Sandy Cronin

Gail Gray
Linda Herbert
Patty Curran-McCarthy
Joyce McDermott
Janet McLaughlin
Gary Means
Shari Payne
David Pearlman

Steve Planey
George Santucci
Matt Stokan
Stephanie Thompson
Jean Walker
Natalie Wilson
Chris Zuzack

Thanks also to these PELA sponsors:

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Rick Sparks
Cheryl Rettman
Dan Wray



(l to r) Chris Zuzack, Shari Payne, Stephanie Thompson and Ben Brudnock covered the booth during one shift.



Ben Brudnock, Citizens Bank, answers a parent's question at the Pittsburgh College Fair.

Annual High School Counselor Workshops a Success

Submitted by
Maryann Dudas
Chair, High School
Counselor Workshops



The annual High School Counselor Workshops were conducted in Fall 2003 at 38 sites across the Commonwealth. PASFAA members and the AES/PHEAA regional directors presented the sessions to approximately 1900 participants from high schools and other agencies.

Evaluations by the attendees were extremely positive with a few excellent suggestions for next year. The binder with the workshop information and related materials given to each participant was well received and will be a valuable resource throughout the year.

The success of the workshops is due to the many PASFAA volunteers and AES/PHEAA staff members who served on the committee, prepared the training materials and binders, and served as presenters and registrars at the sessions. For the first time this year, PASFAA outsourced the preparing of the binders. They were collated, stuffed, and packaged by the ARC of Westmoreland, a non-profit agency in Westmoreland County that trains handicapped adults. The ARC did a wonderful job and was very accommodating in assembling the binders. Thanks to Karla Roach and Vee Blaine at AES/PHEAA who directed the printing of the materials and getting them shipped to the ARC of Westmoreland.



Peter D'Annibale reviews the FAFSA with high school counselors at the Shippensburg University location.



Jean Riley covers details about the FAFSA with school counselors at the I.U. #12 site.

Thanks to Bruce Diefenderfer, AES/PHEAA, for supplying photo coverage and to the following hardworking PASFAA volunteers and AES/PHEAA personnel:

High School Counselor Workshop Committee:

Maryann Dudas (Chair)
Erin Fritz
John Gorman

Marian Hargrave
Melissa Ibanez
Michael Lewis

Don Shade
Dana Suter

Presenters:

Tonya Anthony
Bonnie Lee Behm
John Bieryla
Cheryl Browning
Jim Cardinale
Jim Carideo
Sandra Cronin
Peter D'Annibale
Brandi Darr
Bruce Diefenderfer
Cindy Farrell
Anita Faust
Cheryl Gerber
Linda Grant
Ragan Griffin

Ken Grugel
Maryann Hubick
Melissa Ibanez
Dan Johnston
Mark Kichline
MaryKay Klara
Jamie Kosh
Jennifer Liedtka
Patricia Curran McCarthy
Kim McCurdy
Christine Marrone
Thomas O'Donnell
M. Clarke Paine
Dana Parker
David Pearlman

Peter Rautzhan
Judith Rile
Jean M. Riley
Alison Seagle
Donald Shade
Julie Salem
Stanley Skrutski
Darcie Stephens
Steve Stere
Dana Suter
Jim Treiber
Christopher Vaughn
Michelle Vettorel
Clover Walker
Christine Zuzack

Registrars:

Michael Bertonaschi
Cheryl DePaolis
Bill Hoyt

Carolyn Julian
Sally Ann McCrea

Judy McKenna
Dan Wray



Tonya Anthony responds to a counselor's question at the Millersville University site.



Jim Carideo discusses dependency overrides at the I.U. #15 site.

Government Relations Committee Busy

Submitted by
David Smedley
PASFAA Vice President



Since its last report, The PASFAA Government Relations Committee met November 7 on the campus of Villanova University and January 23 at the Harrisburg Hilton. At its November meeting, Committee guests included the Chairwoman of the NJASFAA Government Relations Committee and the NJHESAA Director of Financial Aid Services. At its January 2004 meeting, the Committee's guest was The Honorable William F. Goodling, former Member of Congress and a PASFAA lifetime member.

The Committee has continued to chart the progress of the various bills pending in Congress that will likely comprise the Reauthorization of the Higher Education Act (See Scott Miller's legislative/political report on pages 8 and 9.) The Committee also reviewed the various student aid proposals put forth by the candidates for the Democratic and Republican Party Presidential candidate nomination. Charts for each of these subjects have been posted to the Government Relations section of the PASFAA web-site. In November, the Committee received perspective on how our colleagues in the Garden State are dealing with legislative issues, and in January, discussion was almost exclusively on federal issues, with the Committee receiving valuable commentary and advice from Former Congressman Goodling. Minutes from these meetings have been posted to the PASFAA web-site.

Most of the GRC – joined by Jean Walker, PASFAA President, and Bill Irwin, former PASFAA President and current EASFAA Federal Relations Chair – traveled the first week of March for a "road trip" to Washington, DC to meet with staff from various Pennsylvania Congressional Delegation offices and from the House Committee on Education and the Workforce. This built on previous visits to Washington, DC by the GRC Chairman, who in March 2004 met with Congressman Timothy Bishop (D-NY, a former DFA), in December 2003 with the legislative aide to Congressman James C. Greenwood (R-PA6), in April 2003 with Congressman Todd Russell Platts (R-PA19) and his education policy staff aide, and in March 2003 with Congressman Chaka Fattah (D-PA1).



Former Congressman William Goodling (center) is welcomed to the January 2004 Government Relations Committee meeting by PASFAA VP David Smedley and President Jean Walker.

In February, Jean Walker formally represented PASFAA at a roundtable discussion on college costs and higher education organized by Former Congressman Goodling in Harrisburg as part of his "Goodling Series" on education issues and which featured Congressman Howard "Buck" McKeon (R-CA), the Chairman of the House Committee on Education and the Workforce Subcommittee on 21st Century Competitiveness. McKeon is the author of the controversial college costs bill that would potentially sanction schools that raise tuition costs twice the rate of inflation over a multi-year period within a specified formula. The program included representatives from other schools, the Association of Independent Schools and Colleges in PA, and State Representative Jess Stairs. Scott Miller and David Smedley also attended the roundtable discussion as observers. In mid-February, Scott Miller also attended the NJASFAA GRC as an invited guest.

In January and February, responding to requests by David Smedley, resolutions which promoted financial aid awareness and praised the work of PASFAA were passed by several bodies:

- City Council of the City of Philadelphia, sponsored by Councilman at-Large David Cohen
- Pennsylvania State House of Representatives, sponsored by State Representative James Roebuck and co-sponsored by over 50 members of the House
- Bucks County Commissioners, sponsored by Commissioner Michael Fitzpatrick



In addition, television interviews in February promoting financial aid awareness were done by committee members Bonnie Behm on CN8, and David Smedley on NBC-10.

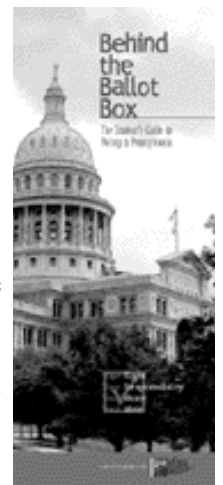
In its March meeting, the Committee drafted letters to Governor Rendell and members of the appropriations committee of the Pennsylvania General Assembly concerning higher education appropriations as the fiscal year 2005 budget process is now in its beginning stages.



David Smedley (third from left) accepts a copy of the proclamation by Bucks County commissioners promoting financial aid awareness. Also in photo are (l to r) commissioners Michael Fitzpatrick, Charles Martin and Sandra Miller.

Enclosed in this newsletter is the brochure, Behind The Ballot Box: The Student's Guide to Voting in Pennsylvania, which the Committee devised to leverage the minute regulatory mandate to provide voter registration forms/info to students in order to inculcate awareness of voting and political issues. In addition to posting on the PASFAA web-site, we are hoping to disseminate the form to secondary schools and community organizations, as the target audience for the brochure is high-school seniors and first-time college students.

The Chairman's proposal for a session on "Doing Good Government Relations" has been accepted for presentation at the NASFAA 2004 Conference in Minneapolis. The topic will spotlight PASFAA's GRC efforts in the past three years – notably, the Legislative Guide, the voter reg/political awareness brochure, and the state/local government resolutions/proclamations.



This is the final installment of a five-part series on preparing for a job change or a new career path.

Marketing Yourself: Life Beyond Your Current Job

Phase Five: The Interview

Submitted by
Sally Treadwell
Newsletter Editorial Board

Congratulations! You've embarked upon making a change in your career by adequately researching job opportunities and companies that are desirable to work for. You've written the Millennium Resume and wooed your prospective employer with a powerful cover letter. Now they've called you for the coveted interview – and your knees are knocking together at the prospect of all your aspirations being boiled down to this moment: a face-to-face meeting. Advice? Take note of a few things:



- The interview shouldn't be one-sided. You are not in front of a firing squad. You have the right, and in fact, are expected to ask questions about the company or the interviewer.
- This leads to another point: a good way of handling nerves is to remember: just as the interviewer is trying to determine if you are an appropriate candidate, you need to discover if this is the job for you. Don't underestimate yourself; it might not be!
- Don't forget to take recent stock of yourself. You may have researched the company, but are you prepared to talk about your strengths and how you can be an asset to the company?



It would also be great to cheer you on with platitudes, such as, "Remember, honesty is the best policy," or better yet, "Be yourself!" Unfortunately, the job interview is not always the place for brutal honesty. When the interviewer asks you, "Why are you interested in leaving your current position?" you might be thinking, "Because my boss is a monster and my co-workers do more chatting around the coffee machine than they do work!" While your opinion may indeed be the truth, a comment like that only positions you as a negative whiner with a superiority complex. A more politically correct answer may be, "I feel that my ideals are starting to diverge from the institution's," or, "I feel my potential for advancement is limited and I'm really looking for a larger challenge." Your interviewer is most likely skilled at the art of the interview and can easily read between the lines.



You already know about arriving early, being prepared to stay late, and dressing appropriately. If you have any doubts about these fundamentals, do a little research into what is expected nowadays. I'll recommend it again: Monster.com has a wonderful reservoir of information on all aspects of the job hunt, including effective interviewing techniques. Postscript for the millennium job candidate: turn off your cell phone! Having a friendly ring jar your conversation is definitely a no-no.

One pat answer to a stress question is also definitely passé: when asked about your weaknesses, don't answer, "I'm a perfectionist." Every HR professional probably wishes they had a quarter each time they hear that phrase. They'd be rich. Instead, consider offering up a real weakness and what you're doing to work on it.

Make sure your answers are to the point and you are not long-winded. In fact, it is not a bad idea to ask the interviewer if you are providing the level of detail that they desire. This gives you a chance to further clarify what they want and might impress them that you took the time to address exactly what they wanted. Look them in the eye. Be direct. If they want an illustration of your overcoming some adversity, be prepared with a story of professional success.

It is usually considered inappropriate to bring up salary before the interviewer does. If you really feel the need, you may wish to ask the range that has been budgeted for the position. But don't get too specific about salary and benefits too early in the process.



If, during the course of the interview, you like what you hear, and decide you really want the job, consider an effective closing. Don't throw out, "Well, when can I start?" Instead, make sure that after you leave, the interviewer

will know a number of your strengths. Ask him or her if there is anything else you can provide, such as references or additional background. Re-state your interest in the position, and what value you can bring to the company. Make sure you ask for the next step in the process. Ask for a decision date. Finally, ask if they will accept calls to ask for the status of the decision.

Finished? Not by a long shot. Make sure you write, physically write, a thank-you note. That means hard copy, not e-mail, unless that is the mode the company specifies. Writing that thank-you note later that day or the next may very well make the difference between landing the job or giving it away to another candidate who did take the time to thank them. If the decision date has passed and you have not heard anything, make sure you call the person who is actually hiring the position and not the HR representative. While you can't ignore HR's importance in the overall scheme, you need to reach the individual with the power to hire at this critical time.



Did you get an offer? Congratulations! No? While no one likes rejection, try not to take it personally. Perhaps it really wasn't for you, or perhaps a better offer is just around the corner. Then the cycle of research, self-examination, tailoring the resume and cover letter continues. Best of luck as you market yourself!

This is the first of a series of suggestions for the newest members of our profession.

So... You're New in Financial Aid? Play "Millionaire" and Don't Go it Alone

Submitted by
Judy Rile
Newsletter Editorial Board



Contestants on Regis Philbin's popular game show have several lifelines to use as they try to win up to ten million dollars. Players who are uncertain of the answer to a challenging question can opt to ask others for help, thereby increasing their chances of success. You, too, have several lifelines to use as you navigate the various issues, policies and regulations that are part of the financial aid officer's daily life. Novice or expert can take advantage of these resources:

Call a Colleague

One of the most popular "lifelines" is to call a colleague – the aid counselor at the neighboring school, the director who facilitated your training at the Don Raley Institute or the person who sat next to you at Spring Training. While we all work at different institutions, we have a lot of the same issues, and financial aid professionals are quick to share their knowledge and experience. So, call a colleague for guidance.

Ask the Audience

Another popular lifeline! Your audience can be other professionals on your campus who can provide advice and information. Your audience can also be the aid officers in your geographic area in one of several informal regional groups in Pennsylvania, such as the group of Northeast PA Independent Colleges (NEPIC), the Regional Aid Issues Discussion (RAID) group of South-central folks or the Philadelphia Area Aid Administrators group to name a few. Your fellow PASFAA sector members, from institutions similar to yours, can also help you with a concern or problem. Consensus from a group on an issue is a valuable tool. Attending regional and sector meetings builds camaraderie and friendships as well, another great benefit.



We're
here
for
you!



Three Wise (Wo)men

While new to the "Millionaire" series, the resources of the Department of Education, NASFAA, PASFAA and EASFAA are old standbys of enormous assistance! IFAP, NASFAA.org, PASFAA.org, and aesSuccess.org and PHEAA.org are all valuable Internet resources with regulations, information, forms, policies and procedures. And you have more than 30 seconds to look for your answer!

You can always **Double Dip** and use two resources, but using **50/50** is not recommended unless you are sure two options are not correct. Take a hint from Regis and others who have a question and are not sure of the answer – use a lifeline to make you a winner with your students!

This issue launches a new series recognizing the achievements and commitment of some long-time financial aid professionals whose quiet manner and modest dedication we gratefully acknowledge.

"The Quiet Diplomat"

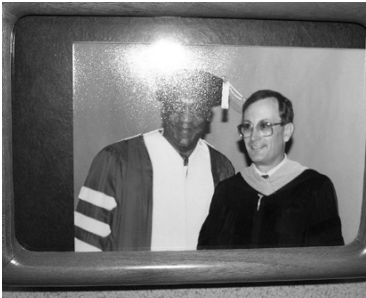
featuring

Dr. John F. Morris

Submitted by
David R. Smedley
Newsletter Editorial Board

The term "quiet diplomat" may just as well have been invented for John F. Morris, Ed.D., Temple University's venerable director of financial aid. In a career that is currently in its third decade, in a society so fixated on free agency, and a field that has concomitantly undergone manifold changes, Dr. Morris has confounded trends by having served a distinguished career in financial aid administration at one institution. He oversees a complex financial aid office that encompasses one main campus and three extension campuses, with over 40 professional staff.

Dr. Morris earned a master's degree in 1971 in the well-regarded Indiana University of PA program in student affairs. As a graduate student, he served internships in admissions, financial aid, and student affairs, thus laying the groundwork for his eventual professional endeavors. After graduation, he migrated east to begin his career in financial aid administration, going to Temple University as an assistant director in charge of College Work-Study under the tutelage of Nick Flocco. During his professional career, Dr. Morris has served on PASFAA Council, the PHEAA State Grant Advisory Board, the PHEAA Need Analysis Board, and the PHEAA Keystone Advisory Board. He was called back into service by PASFAA last year and currently serves as a member of the PASFAA Government Relations Committee.



A youthful John Morris poses with another Temple grad.

Under his leadership, the Temple Financial Aid Office received a commendation for service to the community from the Philadelphia City Council. In the early 1990s, he was invited to provide testimony to the Congressional Advisory Committee on Student Financial Assistance. He also has occasionally provided advice to private organizations on the development/management of their scholarship funds. He prefers a style that relies on quiet diplomacy – working behind the scenes, not always with his face or name in publication, in order to get things done on behalf of students.

During his tenure as director, he has quietly nurtured the development of many professionals. One former counselor has for many years worked for NASFAA, playing an integral role in coordinating the Journal of Student Financial Aid and Student Aid Transcript publications. At least three former associate directors and one counselor currently serve as financial aid directors at various institutions throughout the country. Another former associate director has for many years served as an associate vice president for student affairs at Temple. Dr. Morris has also facilitated the development of many undergraduate and graduate students who have worked in the financial aid office under his leadership.

Dr. Morris credits several professionals with helping him to be successful in his career: Vince Femia, the former DFA at Villanova and PASFAA president; Nick Flocco, Ken Reeher, PHEAA's first President and CEO; and Professor Jay Scribner who chaired his dissertation committee in the late 1980s at Temple. But perhaps the most critical personal and professional assistance he received came from his beloved wife, Betty Ann, with whom he shared not only matrimony, but a career in student aid administration. It was at Temple that he met his wife, who had started working there a year earlier. Dr. Morris memorialized Betty Ann after her passing by raising funds for the establishment of a scholarship that helps Temple students from the Ambler Campus or the Tyler School of Art who major in Business, Spanish, or Horticulture – all of which Betty Ann studied while serving in the financial aid offices of both campuses. To date, over \$40,000 has been raised, and currently, two Temple students are recipients of the Betty Ann Shema-Morris scholarship.

In a career that has spanned over three decades, surely there have been changes – both good and bad – which Dr. Morris has experienced. Maybe the most important change he has seen has been the fact that "parents expect more" than before, and that the advancements in technology, such as the Internet, have greatly changed the



Dr. John Morris in his Temple University financial aid office.

dynamics of the financial aid office. It has led to the need to provide more information – a need which has become more of an expectation over time. As a result, according to Dr. Morris, students and parents "have become a little bit more demanding." And although the great changes in technology have improved processes, he said that we in financial aid have in some ways become "victims of our own success" because the technological changes only beget the need for more information and more technological changes to keep up.



In spite of this, Dr. Morris emphasized that it is important for financial aid officers to realize that "you can't do it all yourself." Avoid stress by "learning to trust" your staff and co-workers. On the other hand, he emphasized, it has been greatly beneficial to have an agency like PHEAA for schools to rely on for services. "People don't realize how much PHEAA does for schools in Pennsylvania," Morris said. In the end, according to Morris, the developments in technology, and changes in policy (e.g. lower loan rates and development of a part-time state grant program), have meant greater benefits to students, "and that's what it's all about" because "it's all about getting back to access."

With a long distinguished career that is still ongoing, we highlight this "quiet diplomat" who has played an integral role in the development of student aid for the benefit of the students and financial aid professionals throughout post-secondary institutions in Pennsylvania.

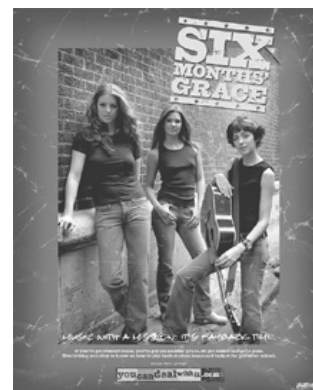


"Six Months' Grace" Now Playing

Submitted by
Kathy Myers
AES

The YouCanDealWithIt.com student loan default prevention campaign launched its new public service initiative, Six Months' Grace, an unreal band with a very real message. The "band," made up of three recent college graduates, is the latest in a series of public service initiatives in conjunction with the YouCanDealWithIt campaign. Six Months' Grace is all about the challenges facing college students and recent graduates, especially how to handle student loans. Six Months' Grace is "music" on a mission and designed to drive college students and recent graduates to www.YouCanDealWithIt.com to access important financial literacy and money management tools and resources, and ultimately decrease student loan delinquencies.

The Six Months' Grace campaign launched on college campuses in October in the form of informative, call-to-action posters, and will continue on "tour" in Rolling Stone magazine, on cable television and on the radio. This latest offering supports YouCanDealWithIt.com's two primary goals – to reduce student loan delinquencies and to help AES' young borrowers learn that good credit is vital to a promising future.



AES Awards \$15 Million in Scholarships Over Next Six Years



American Education Services/PHEAA launched the PHEAA Academic Excellence Scholarship Award Program in November 2002 to reward students with both high academic potential and demonstrated financial need. The program will benefit Pennsylvania State Grant recipients who met the qualifications for the federal Robert C. Byrd Scholarship Program but did not receive funding. (All funding for this program comes from AES/PHEAA's business earnings and does not require any taxpayer support.)

The PHEAA Academic Excellence Scholarship Award Program will begin providing awards to incoming qualifying freshman at Pennsylvania postsecondary institutions in the fall of 2004 and 2005. First-year awards will equal \$1,500 with the opportunity for renewal for up to three additional academic years if the recipient maintains continuous full-time enrollment and meets the satisfactory academic progress requirements as determined by the student's postsecondary institution. Qualified Byrd Program applicants will be automatically considered for the PHEAA Academic Excellence Scholarship Award Program with no additional application process required.

Auditing Your Time "Leaks"

Submitted by
Terri Neiswonger
Newsletter Editorial Board

How much time do you lose through these 12 common time "leaks?"



Starting a job before thinking it through.

Do you start lots of jobs at the same time? Even if you can handle different tasks simultaneously (and who isn't expected to multitask?), your efficiency can suffer if you don't have each task defined, planned and under control. When Mary Miller, AES Regional Manager of School Services, is on the road, she uses that time to return calls and check e-mails. She plans ahead for what things she can accomplish while traveling and makes her travel time quality time. The key here is productivity and good organization.

Doing unproductive things from sheer habit.

Be prepared to make drastic changes. Be creative to find and introduce different ways of doing things. In financial aid, change is inevitable. Are you prepared to look at a procedure and see what is the most efficient way to perform that task? We can get into a habit of doing something just one way simply because it's been the only way for so long, when another way may take half the time. Keep this point in mind as we prepare for the new letter writing and reports program AES is rolling out.

Keeping too many unnecessary records.

Keep a clean desk and well-organized systems (including your computer files), but do not be obsessive about it. Some people like to put post-it notes all over everything and that helps them stay on task. Others may find that all those post-it notes make them feel out of control with too much to do staring at them. For those people, try using the Microsoft Office Calendar/Tasks. Patty Peterson, Director of Financial Aid at Grove City College, uses the Task list and finds that physically checking off a finished job gives her a sense of accomplishment and keeps her motivated and on task.



Paying too much attention to "low return on investment" items.

When you're faced with a pile of things to do, go through them quickly and make a list of what needs doing and when. You may know this as the A's, B's, and C's prioritizing system. After this, handle each piece of paper only once. Do not, under any circumstances, pick up a job, do a bit of it, then put it back on the pile.



Failing to anticipate crises.

Plan time slots for unplanned activities – you may not know exactly what you will need to do, but if you plan time to handle the inevitable interruptions, then other important things will not get pushed out of the way when you need to shift gears. For example, during the spring and summer, financial aid offices are very busy with aid packages. These usually result in an increased number of phone calls and e-mails, and more often than not, the bulk of those inquiries come on Mondays. It is important to plan accordingly for days like that so that deadlines are not missed or delayed because of an increase in customer service response.

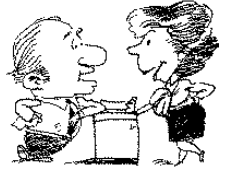
Making unnecessary visits or phone calls.

Manage your e-mails and phone calls – do not let them manage you. Ideally, check at planned times and avoid continuous notification of incoming e-mails. Mary Miller states that she likes to return calls at the beginning or the end of the day, because she finds that she usually has a better success rate of reaching the person with whom she needs to speak. However, some people may feel that managing many return calls or e-mails all at once would be daunting if not overwhelming. The "One Minute Manager" approach may help: handle paper once (if you pick it up, do it now) and respond to calls and e-mails immediately. For some of us, it is easier to spend five minutes to take a phone call now than to find an hour at the end of the day to respond to all of the calls we let pile up. And as they build up, it may create a stress that you are not willing to cope with and leave you unable to concentrate on other aspects of your job. Patty Peterson always uses one of her previous employer's words of wisdom for time management: "If you have to swallow a frog, don't look at it too long." In other words, just get it done!



Socializing at great lengths between tasks.

We all know those "water cooler" conversations and how they can last much longer than anticipated. Pay attention to how much time you allow yourself to be social. If you find yourself struggling to find enough hours in a day, monitor yourself to find how much of each hour you are using productively.



Failing to build good barriers against interruptions.

Try to minimize the time that you are available to take unplanned phone calls, unless you are in a customer-facing, reactive role (customers can be internal too). Even if you are customer-facing, you must plan some time slots when you are not available, or you will never get anything important and proactive done. Jean Walker, PASFAA President and Director of Financial Aid at Butler County Community College, schedules her day in blocks of time. The blocks early in the morning and late in the day she reserves for projects that require her complete attention as she finds that she gets less interruptions at those times. Jean also uses a block of time right before leaving for the day to organize the next day's agenda and having a project ready to go for first thing the next morning. She also wraps up any loose ends that she may have gotten sidetracked from during the day.



Doing things that should be delegated.

You do not need to be a manager to delegate. Just asking nicely is sometimes all that is required to turn one of your difficult tasks into an easy one for somebody else who may be better able to do it. Letting go of work frees you up to concentrate on the parts that require your attention.

Doing things that are not part of the job.

Recondition the expectations of others as to your availability and their claim on your time. If your office has regularly scheduled "quiet" days or times, be sure you are using the time to accomplish work and not allowing your time to be eroded with frequent interruptions by others or by yourself.

Failing to plan regularly with your boss.

This includes other employees as well. Always probe deadlines to establish the true situation – people asking you to do things will often say 'now' when 'later today' would be perfectly acceptable. Appeal to the other person's own sense of time management; it's impossible for anyone to do a good job without the opportunity to plan and prioritize.



Engaging in personal work before starting business work.

This is self-explanatory and of course, none of us would do that anyhow!

Obviously, time management is a job in itself – managing what must be done when – now, later today and in the future. What works for one person may not work for another. The trick is to find what works best for you to increase your efficiency. Each day brings 24 new hours and, for most of us, at least eight of them are spent at work. Your eight hours may yield more quality productive work if you recognize and control the factors most frequently responsible for blocking the best use of your time. So now that my block of time for this project is up, I bid you good luck, good-bye and good day!

Council Minutes on PASFAA Website

The newsletter will no longer carry minutes from recent Executive Council meetings. You can access the complete minutes of the February 9, 2004 meeting on the PASFAA website at www.pasfaa.org.



PAPSA & ED to Sponsor Career Schools' Financial Aid Conference

Submitted by
Kathy Yakamavage
Empire Beauty School

For the first time, the U.S. Department of Education and PAPSA (Pennsylvania Association of Private School Administrators) are cosponsoring a private career colleges and schools Region II and III financial aid conference on April 20-22, 2004 at the Philadelphia Airport Hilton. This is a great opportunity to listen and speak with Sally Stroup, Victoria Edwards, Greg Martin, Jeff Baker, Kay Jacks, Geneva Coombs, and other top staff from the U.S. Department of Education.



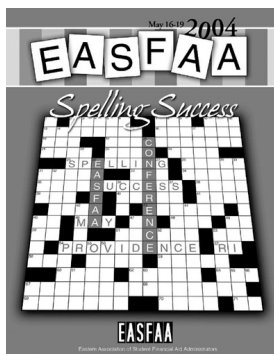
The conference includes breakout sessions including Basic and Advanced Financial Aid Training, Audit Requirements, Title IV Compliance Issues, R2T4, Pell Processing and Disbursement, and Professional Judgment to name a few. Other speakers include Sharon Bob, Peter Leyton, Douglas Laine and U.S. Senator Arlen Specter (R-PA).



For a complete agenda and registration, along with hotel information, go to the website www.region2and3pccs.com. Take advantage of this groundbreaking event!

EASFAA Conference Ready to "Spell Success"

Submitted by
Mary Miller
Aes/PHEAA



Come join your EASFAA colleagues at this year's conference in Providence, Rhode Island! From Sunday through Wednesday, May 16-19, the 2004 EASFAA Annual Conference will be held at the Westin Providence and Providence Biltmore Hotels. The conference committee has been hard at work since last August to plan a conference full of information-packed sessions, professional networking, and exciting social events!



Visit the EASFAA website (www.easfaa.org) for the very latest in conference news, including registration, agenda, and hotel reservations. Mark your calendars and register today for EASFAA's debut of "Spelling Success" in Providence.

PASFAA Conference 2004 Plans to Go International "Uniting our Students"

Submitted by
Mary Gazal
2004 Conference Committee

Get your passports updated for an international adventure! The journey begins from the Penn Stater Conference Center Hotel in State College, October 17-20, 2004. Prepare to experience international cuisine from around the globe, as well as the renowned local fare. Join us for a "black-tie optional" gala, celebrating 25 years of the Pennsylvania Financial Aid Training Program, the financial aid community's premier training program.



The Conference Committee meets for a planning session in February.

New conference features for 2004 include:

- ✓ All conference registration will be done online. Watch www.pasfaa.org for more information.
- ✓ Since our last conference at State College, the Penn Stater has expanded their facility to be able to accommodate all conference attendees at one location.
- ✓ The President's Reception will be held on Monday evening, October 18.

Mark your calendars for PASFAA International October 17-20.

This is the second in a series of articles for the "Compliance Corner."

Dependency Override – When and When Not?

Submitted by
Kathy Myers
Newsletter Editorial Board

The conditions that support the use of a dependency override by financial aid administrators and the documentation required by the U.S. Department of Education (Department) for such an override are discussed in the recently published Dear Colleague Letter (DCL) GEN-03-07.



An independent student is defined by section 480 (d) of the Higher Education Act of 1965 (HEA), as amended, as a student who meets one or more of the following criteria:

1. Is 24 years of age or older by December 31 of the award year;
2. Is an orphan or ward of the court or was a ward of the court until the student reached the age of 18;
3. Is a veteran of the Armed Forces of the United States;
4. Is a graduate or professional student;
5. Is married;
6. Has legal dependents other than a spouse and for whom they provide over half of that person's support.



In addition, a student is considered to be independent, under HEA section 480 (d) (7), if he or she "is a student for whom a financial aid administrator makes a documented determination of independence by reason of other unusual circumstances." The Department has interpreted the phrase, "other unusual circumstances," to conditions that make it inappropriate to expect a parental contribution for the student.

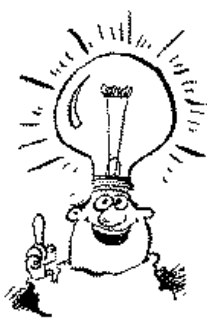
Four conditions that, individually or in combination with one another, do not qualify as "unusual circumstances" or that do not merit a dependency override are:

1. Parents refuse to contribute to the student's education;
2. Parents are unwilling to provide information on the application or for verification;
3. Parents do not claim the student as a dependent for income tax purposes;
4. Student demonstrates total self-sufficiency.



The Application and Verification Guide recognizes the common practice in the profession that unusual circumstances could include an abusive family or abandonment by parents. For example, making dependency overrides in situations when a student's parent cannot be located or when an otherwise dependent student has been a victim of domestic violence and is no longer residing with his or her parents.

In addition, the law requires that a determination of unusual circumstances must be made each award year. The law also requires that the financial aid administrator at the school, which the student is currently attending, make the determination. The determination, that a student should be considered independent, by a financial aid administrator at one school is not binding on another school.



Third party written documentation supporting a student's unusual circumstances is generally required. There may be some instances, however, when the only documentation available to the financial aid administrator is a statement by the student. In these limited cases, the student's statement must include the facts related to the student's unusual circumstances and the school must include any other pertinent facts in writing.

Upon making a determination that a dependency override is warranted, the financial aid administrator must prepare a written statement of that determination, including the identification of the specific unusual circumstances upon which the financial aid administrator based his or her determination. The school must maintain this documentation and the supporting documentation used to make each determination. Questions relating to dependency overrides can be directed to cmpolicy@aesSuccess.org.

Have you been to **www.pasfaa.org** today?



***"USA Funds continues
to be a great partner by
supporting our default-
prevention initiatives."***

Together, we've decreased Oakwood's default rate through excellent products and responsive customer service. Just recently, USA Funds provided us with a new line of publications from which students can find answers to their loan repayment questions. Each brochure is student-friendly, easy to read, colorful, clear and to the point. That makes our job easier. Thanks USA Funds!

To learn more about how USA Funds can make your life easier, call Ambrose Price toll-free (866) 497-USA F, ext. 5670, or visit www.usafunds.org.



Fred Stennis
Director of Financial Aid
Oakwood College



PELA News

Submitted by
Kerry Paoletta
National City

PELA members are busy working on many PASFAA committees and miscellaneous projects this spring. PELA will be presenting two different sessions at the annual PASFAA Spring Training – one is on alternative loans and the other is on creative financing. PELA members will be at both the Pittsburgh and Drexel Hill sites to participate. Many of us will also be exhibiting at the second annual PACAC Northeast College Fair in Wilkes-Barre in May.



Pennsylvania Education
Lenders Association

We are always working on updating the web-site and welcome ideas or suggestions from our schools to make this a more usable site for you. Contact any PELA member with any ideas or helpful suggestions for the web-site.



PELA presented five \$1,000 scholarships to schools who were drawn at random at the October 2003 PASFAA conference. Schools determine the criteria for awarding the scholarships and make their selections accordingly. Congratulations to the schools and to some of the students pictured here who were selected to be recipients.



Donna Booton (left), Student Accounts Director at Central Penn College, presents her PELA scholarship to Debbie Peterson (center) and Jessie Atkins.



Student, Diane Giffried (center) receives a PELA scholarship from Felicia Korenstein (left) and Mindy Henken (right), both assistant directors at Bryn Mawr College.

Finance & Development Committee Looks at Sponsorship Process

Submitted by
Mary Kosin, Chair
Finance & Development Committee



The Finance and Development Committee met at the Dixon Center in Harrisburg on January 30. Sheryle Proper, PASFAA Treasurer, presented the treasurer's report, budget report and sponsorship summary. Also on the agenda was a discussion about the process of soliciting sponsorship dollars from our vendor/sponsors. The committee and the Association are very grateful to the support offered by the vendor/sponsors, and as F&D chair, I will be attending the next meeting of PELA to present possible changes and to solicit suggestions to streamline sponsorship procedures. We are considering the possibility of utilizing the PASFAA website in the future to assist us with the sponsorship process. Lastly, future meeting dates of the committee were planned. Please feel free to contact any member of the F&D committee with issues or problems you would like to see addressed.

Thank you to the following sponsors who are providing generous support for PASFAA activities for the 2003-04 fiscal year. It is because of this support that PASFAA is thriving as an organization and able to create new initiatives for the benefit of all. We look forward to continuing working together.

Platinum (\$8,000 and Above): AES/PHEAA, Citizens, Key Education Resources, M&T Bank, National City, PNC Bank, Sallie Mae

Gold (\$6,000 - \$7,999): Citibank Student Loan Corporation, Fleet Education Financing

Silver (\$4,000 - \$5,999): Academic Management Services, Beneficial Savings Bank, Chase, Educaid/Wachovia, Nellie Mae, USA Funds

Bronze (\$3,000 - \$3,999): Chase Education First, College Board, EdAmerica, Sovereign Bank, SunTrust Education Loans

General (Up to \$3000): TERI/The Education Resource Institute, Wells Fargo EFS



PRIVATE SECTOR

Submitted by
Brian Blackburn
Private Sector
Representative

Spring is here. I hope everyone is ready for the crush of incoming freshmen.

At our sector meeting March 5, representatives from the Association of Independent Colleges (AICUP) updated us on what is happening at the state level of government and about Student Lobby Day. Also, Walter Cathie, from Widener University, provided a presentation on leveraging of aid and Mary Beth Kelly, from AES/PHEAA, spoke about the State Grant Program. Feel free to contact me if you were unable to attend and want more details.

I have attempted to electronically forward to you the weekly notices that AICUP sends me. Their information is extremely useful and I hope it will start to generate more discussion via e-mail or at our next sector meeting.

I would like to impress upon you the importance of PASFAA's new website. You should have all received an e-mail that provides you with your user name and password to gain access to the members' area. You will need to log in and update your personal profile. Please review your information and make any adjustments before you start surfing the site. The more accurate your information is, the more accurate the association can keep its records. I challenge all of the Private Sector members to be the first sector to completely log-in and update all of our profiles!

Would one representative (preferably the director) of each school send me a list of updated e-mail addresses for all members of that school? A lot of e-mails are bouncing back to me with bad e-mail addresses. My contact information is on the inside cover of this newsletter.

**STATE-RELATED
SECTOR**

Submitted by
Meme Jeffries
State-Related
Sector Representative

Greetings! It's that time of the year again — spring, warmer weather and packaging!

Scheduling and traveling distances make it difficult to meet as a sector. To keep the State-Related Sector informed about what is going on in PASFAA, I have created an e-mail list of the members of the State-Related Sector. Many of you have already received e-mail updates concerning PASFAA activities from me. I will continue to e-mail the State-Related Sector members concerning PASFAA issues. If you are currently receiving these e-mails from me and don't want to be included, please let me know. I will also continue to update my e-mail list as needed when new members register.

As you already know, the new PASFAA website is up. If you haven't already done so, check it out at www.pasfaa.org. Every member should have their own user name and password to get into "Member Services." Please make sure that your demographic information is correct.

Thanks to those of you who responded to my request for questions for the Teleconference concerning college cost issues. There were some excellent responses and they certainly helped me prepare for my participation in the taped segment of the Teleconference.

If anyone has issues, concerns or news that they would like to share with the rest of the State-Related Sector, please feel free to email me at Jeffries@oafa.pitt.edu or call at 412-624-7167, and I will be happy to pass it on to the sector or Executive Council.

NURSING SECTOR

Submitted by
Ginny Kopko
Nursing Sector
Representative

I vaguely remember, around this time of year, a "down" time in the annual cycle of financial aid. I am quite sure this "down" time is a thing of the past as our shops just get busier, faster!

I am excited to hear that both the East and the West Nursing Sector groups had a chance to meet this past fall. The Western section met on December 10 and the Eastern section on November 21. In the West, Kathy Myers, AES/PHEAA, prepared a packet of valuable information addressing changes to the loan process, form updates and services provided to schools by AES. In the East, Michael Burke, AES/PHEAA, shared similar information. Also Joe Manotti, from the Pennsylvania Higher Education Foundation, provided an update on the Foundation, the Nursing Loan Forgiveness Program for Healthier Future, and addressed questions and concerns regarding the Nursing Block grants being awarded to nursing schools from the Foundation. To help bridge that gap from the East and West, I am gathering sector information and will be sending out a new nursing sector directory soon.

There are some exciting changes and opportunities for all of the PASFAA members. Spring Training is scheduled for April 2004 and you will have the opportunity to register online using the new Website. You can also complete your volunteer form on the website, so it's easy to get involved! And for those of you who may be struggling with your internal processes, PHEAA now offers improved letter writing features to use for packaging and awarding aid. This is a beneficial tool that will streamline your process and improve communication with your students.

If you have any questions, need any assistance, or have an issue you want me to address at the next Council meeting, please contact me at 412-749-7639 or at gkopko@hvhs.org.

**BUSINESS, TRADE
& TECHNICAL
SECTOR**

Submitted by
Stephen Helfrich
Business, Trade
& Technical
Sector Representative

Greetings to all members of the B, T & T Sector! Spring has arrived and finally the snow has disappeared. Hopefully you had a chance to take advantage of the Need Analysis/DataLink Workshops that were offered in February and March. Once again the workshops proved to be informative and useful.

PASFAA's Spring Training Seminars are just around the corner starting in the West on April 14 at the Pittsburgh Marriott North and in the East on April 20 at the Drexelbrook Catering and Conference Center.

The Central PA B,T&T group held their first meeting of the year on April 1. Please contact me if you are interested in attending future meetings as all are welcome.

The biannual B,T&T workshop will be coming up again in 2005. Please consider volunteering to help your sector as chair, co-chair, or as a committee member. Responsibilities include selecting topics and preparing materials for discussion of issues pertinent to the B,T&T sector's financial aid administrators.

As your sector representative I am here to represent you, and your questions, issues and concerns are welcomed. I can be reached by phone at (717) 757-1100 ext 356 or by e-mail at helfs@yti.edu. I look forward to hearing from you.

INSTITUTIONAL SUPPORT SERVICES SECTOR

Submitted by
Nancy Chalker
Institutional Support
Services Sector
Representative

Greetings to all ISS members. PASFAA Executive Council held their meeting on February 8-9 at the Penn Stater. All of us will be able to fit at The Stater for this year's conference, as the renovations to the Stater will be done by October. No need for overflow accommodations.

PASFAA is doing very well, in memberships (we have 619 paid members as of December 31) and also financially. We have over \$162,000 in the bank including \$43,000 profit made on last year's conference at Seven Springs.

The 2004 conference at The Penn Stater looks like it's going to be fabulous. Donna Wilkoski and her committee selected "PASFAA International - Uniting our Students" as the theme with colors of green, blue and white. And since we're in State College, the ever popular "Pub Crawl" returns. New this year will be conference registration on-line.

There is a change this year regarding sponsor/vendor payments. Invoices will be mailed by August 1 with an October 1 payment deadline. A reminder notice will go out on December 1. For any payments not received, during the NEXT sponsorship drive, the vendor/sponsor will not be allowed to participate until all prior balances have been paid. AND, they will have to prepay for future sponsorships.

There was quite a bit of discussion at the Council meeting regarding the comments and suggestions from the January PELA meeting concerning last year's conference. I have been assigned to form a task force whose function is to determine a general consensus of opinion. Topics will include an examination of ways to make better use of sponsorship monies, sponsorship levels, etc. If all of the task force members can coordinate our schedules, we should be able to formally present something at the June Council meeting.

The next PELA meeting is April 6 at AES in Harrisburg. Please plan to attend.

INSTITUTIONAL AT-LARGE SECTOR

Submitted by
Margaret F. Hynosky
Institutional At-Large
Sector Representative

Included in this edition of the Newsletter is information on volunteering for PASFAA committees for the upcoming 2004-05 year. Please consider offering your service for a PASFAA committee. All levels of expertise and experience are welcome to give committees a balanced perspective and to be sure we are meeting the needs of our members and those whom we serve. If you have any questions about volunteer opportunities in PASFAA, you can reach me at (570) 941-5925 or e-mail me at hynoskym1@scranton.edu.

STATE SYSTEM of HIGHER EDUCATION SECTOR

Submitted by
Ragan Griffin
SSHE Sector
Representative

Happy spring everyone. With the changing of the seasons comes the changing of award years, and I know that you are all busy gearing up for the 2004-05 Award Year. However, please mark your calendars for April 22-23 and plan to spend a couple of days at the Ramada Inn and Conference Center in State College, the site of this year's SSHE Sector Spring Meeting.

Our annual meetings always provide an excellent opportunity to share ideas and advice and increase our knowledge base in a relaxed and friendly atmosphere. Some items already on this year's agenda include the SAP campus management initiative and updates from our colleagues at PHEAA and the State System office. Please contact me at either (814) 393-2315 or at rwatson@clarion.edu with any additional agenda items that you would like to discuss during the meeting. I will also have the results of our BOG Survey ready for distribution.

Don't forget to check out the new PASFAA website that is now "live". ATAC has done a splendid job and our new website is very attractive and easy to use. While you are visiting the website, think about completing a volunteer form for this year. PASFAA relies on its members to volunteer their time and expertise to produce quality training programs and develop knowledgeable leaders. Our sector has always been well represented in PASFAA leadership, and I'm sure we want this tradition to continue so start thinking about volunteering as a candidate for the upcoming slate of officer positions now!

I look forward to seeing many of you at our sector meeting in April. Until then, take care and enjoy the warm weather.

PUBLIC TWO-YEAR SECTOR

Submitted by
John Schodowski
Public Two-Year
Sector Representative

Greetings! The Public Two-Year Sector held our fall meeting at the Best Western, Harrisburg Airport. Diona Wise, AES/PHEAA, provided us with a general update. We are very thankful to her and her willingness to take time out of her day for our group. The discussions at our sector meetings cover a wide range of topics and lend insight into how different colleges within our sector do business. If you are looking for some help in an area or just want to share how your college handles things, feel free to ask that it be included in the agenda for the next sector meeting. E-mail me at jschodowski@racc.edu.

I invite all of you to visit PASFAA's website. This new site is where you will go to vote and register for both spring training and the conference. Speaking of voting, I encourage each of you to consider taking a more active roll in the future of PASFAA by running for office or serving on a committee. Elections for next year's offices are detailed on the website and in this issue of the newsletter.



From the Editor's Desk

Have you visited the redesigned PASFAA website yet? It's chockfull of information and up-to-the-minute news about the Association. Suggestions for this work-in-progress are always welcome and can be directed to any Council member or Gary Means, our designated ATAC liaison. A new feature is your ability to update your membership profile anytime so that your personal data is always accurate. By keeping your profile current, you ensure timely receipt of training and conference materials as well as of this newsletter.

The website is not the only change. Also new is the timing of submission of nominations and election of officers and sector representatives. These modifications were necessary to convert to a web-based voting process. All nominations for 2004-05 Council members must be submitted by May 15. Voting will be on-line from July 15-August 1, and election results will be announced August 15. The changes to the election process as well as the fresh new look and improvements to the website reflect PASFAA's place as a dynamic organization in service to its members and those we serve.

Joan L. Holleran
PASFAA Newsletter Editor

PASFAA Bulletin Board



By Members

Best wishes to **Joan Willertz**, Penn State-Lehigh Valley, who retired in December. **Maryann Hubick**, formerly at Penn State-Berks, is stepping into the position vacated by Joan.

Deborah Cawley has joined Widener University's staff as a Financial Aid Counselor.

Linda Pacewicz, formerly with The College Board, has accepted the position of Regional Marketing Manager for Chase and will be covering Eastern Pennsylvania.

Welcome to **Jamie Lowthert** who is the new Director of Financial Aid at Lycoming College. Jamie was previously at Hood College in Maryland.

Joseph Alaimo, formerly at Penn State-Hazleton, has joined the staff of Luzerne County Community College as Assistant Director of Financial Aid.

Douglas Vore, formerly at Drexel University, is the new Assistant Director of Financial Aid at Montgomery County Community College. Doug replaces **Delores Rush** who retired from the college in December after 13 years of service in the Financial Aid Office.

Welcome to **Thelma Ross**, who is the new Director of Financial Aid at Lincoln University. Thelma comes to Pennsylvania from Clark Atlanta University in Atlanta, Georgia where she was Associate Director of Financial Aid.

Sheree Fetcho, California University of PA, and husband, Chris, welcomed their second son, Kyle Andrew, on February 18. Kyle joins big brother, Nathan, who is almost three years old.

Fran McKeown, celebrated her 29th year in the financial aid profession on March 4. Fran started in the LaSalle University Financial Aid Office under the supervision of **Gene Cattie**, who is now with Nellie Mae.

Judy Rile, formerly at Rosemont College, steps into the position of Financial Aid Coordinator at Penn State-Berks.

Ken Brandt, former Director of Financial Aid and currently the Director of Extended Learning at Edinboro University of PA, announces his retirement effective June 25.

Condolences to **Judy Neyhart**, former DFA at Cedar Crest College and now Dean of Enrollment, whose mother passed away in March.

Linda Bell, who was serving as Acting Director of Financial Aid at Lehigh University, has been named as director.



About Members

Top Ten List for Getting Through the Packaging Season

Submitted by
Judy Rile
Newsletter Editorial Board

10. Have a plan. Be organized with a system in place with easy access to all of the tools you need.
9. Keep the lines of communication open with your colleagues on campus. Let them know what you are doing so they can plan accordingly.
8. Keep good notes and documentation of special circumstances. It's hard to remember what you did two weeks ago let alone last spring!



7. Share the load – student workers are great for copying, stuffing envelopes, etc.
6. Schedule time on a regular basis to prepare packages. Monday mornings and Friday afternoons are probably not good; Tuesdays and Wednesdays are probably more productive (and provide a good reason to bow out of a boring meeting.)
5. Ask for help if you are getting behind.

4. Have all attachments and inserts prepared ahead of time.
3. Proofread carefully! It is time-consuming to redo a letter because of a typo or a comma in the wrong place (and can be expensive, too!)
2. You can't do it all and maintain your sanity. Burning the midnight oil does nothing but burn the oil. There is always tomorrow.
1. Chocolate helps. Lots of chocolate helps even more. Keep a variety of treats on hand. Indulge as needed.



Ode to My Spell Checker

Submitted by
Dan Wray
Funny Guy from the
Technology Advisory Group

Eye halve a spelling chequer.
It came with my pea sea.
It plain lee marques four my revue,
Miss steaks eye kin knot sea.
Eye strike a key and type a word
And weight four it two say,
Weather eye am wrong oar write
It shows me strait a weigh.

As soon as a mist ache is maid,
It nose bee fore two long.
And eye can put the air or rite
Its rare lea ever wrong.
Eye have run this poem threw it.
I'm shore your pleased two no
Its letter-perfect awl the weigh
My chequer tolled me sew.



We Saw You at...



February Executive Council Meeting
Jean Walker, PASFAA President, demonstrates the newly redesigned PASFAA website.



Western PA Nursing Sector December Meeting
(l to r) Donna Scolieri, Donna Bucci, Tracey Wassel, Adrienne Gerber, Ginny Kopko, Tamyka Abercrombie, Nancy Lohr, Nora Boyle.

Coming Events:

April 2004

Spring Training Seminars

April 14
April 20

Pittsburgh Marriott North at Cranberry Woods
Drexelbrook Catering & Conf. Center, Drexel Hill

May 16-19, 2004

EASFAA 2004 Conference, Providence, RI

June 14-18, 2004

Don Raley Institute (for New Aid Administrators), Dickinson College, Carlisle

June 16-18, 2004

Financial Aid Basics (for Non-Financial Aid Personnel), Dickinson College, Carlisle

July 18-21, 2004

NASFAA 2004 Conference, Minneapolis, MN

October 17-20, 2004

PASFAA 2004 Conference, The Penn Stater Fundamentals Workshop, prior to PASFAA Conference

Date pending

Nov - Dec, 2004

Electronic Access Conferences

November 1-4
Nov 30 - Dec 3

Royal Pacific Resort, Orlando, FL
Paris Las Vegas, Las Vegas, NV



4513065010 PASFAA Newsletter
Financial Aid Office
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