A Boxcar Full Of Memories

From The PASFAA Express 2002

FEATURES
- President's Letter
- 2002 Conference Coverage
- Member Service Awards
- Election Results
- 2001-02 Financial Report
- First Leadership Development
- High School Counselor Workshops
- Past President's Club
- "Sootheysers" Offer Wisdom
- Sector and Committee Reports
E X C R E T S

1. NEWSLETTER EDITORIAL BOARD FOR 2002-03

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EDITORIAL BOARD
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Joetta Bradica Kimberly McCurdy David Smedley
Randy Chalker Kathy Myers Sally Treadwell
Alicia DeStefano Terri Neiswonger
Ragan Griffin Judith Rile

2. PUBLICATION SCHEDULE

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

<table>
<thead>
<tr>
<th>Season</th>
<th>Articles Due Date</th>
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<tr>
<td>Spring 2003</td>
<td>February 15</td>
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<td>Summer 2003</td>
<td>May 15</td>
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<td>Fall 2003</td>
<td>July 15</td>
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<td>Winter 2004</td>
<td>November 15</td>
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3. IMPORTANT MESSAGE

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

P A S F A A
P O T P O U R R I

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.westmoreland.cc.pa.us. For 2002-03, the membership list is maintained at Westmoreland County Community College.

2. 2002-03 PASFAA COMMITTEES


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 2002-03 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

Webmaster, Mary Miller, mmiller3@aissuccess.org or PH12038.
LETTER FROM THE PRESIDENT

Greetings PASFAA Members:

It is hard to believe that my year as President Elect has ended already and I am writing my first "President's Letter" to you. Our annual conference held at the Hershey Lodge was a wonderful success as we broke all prior conference attendance records. A total of 561 members registered for the conference with nearly 20% or 106 of them being first-time attendees. Cindy Haney and her conference committee put together an informative, entertaining, and relaxing conference. The conference agenda provided a wide array of session options for everyone from the novice to the seasoned veteran. In addition to the 46 different interest sessions, we heard the latest news out of Washington from key Department of Education officials such as Sally Stroup, Kathleen Smith, and Jeff Baker. The social activities were diverse and entertaining, from the very witty and quite politically incorrect Capital Steps to the Circus Train event on Tuesday night. For me the circus train brought back many fond memories of going to the carnivals in the small town where I grew up in Ohio.

We also received overwhelming support from over 30 sponsors who helped to make our conference such a great success. Because of their financial generosity, we were able to ensure that our members had an outstanding conference. We are deeply grateful for their support of PASFAA and its members. Along that venue, our membership showed their generosity by giving a total of $720 and 14 boxes of toys and supplies to the Ronald McDonald House in Hershey. Thank you to all of you who contributed to this year's conference community service project.

As I mentioned in my acceptance speech at the conference closing business meeting, I want to encourage everyone to get involved with PASFAA this year. You can contribute in many ways to our association – by serving on a committee, by volunteering to assist with Spring Training registration, by serving as a presenter and/or moderator at our annual conference or the Guidance Counselor Workshops, by stuffing conference bags, and the list goes on. Beyond just volunteering, I want to continue to foster a spirit of continuous improvement; so your ideas and suggestions on how we can improve our association are welcomed. Your input is invaluable to ensuring we have an even stronger association that is responsive to the diverse needs of our membership. If you have never volunteered before, try stepping out of your comfort zone and committing your time and talents to PASFAA. You will find it a very rewarding and fulfilling experience. You can download the PASFAA 2002-2003 volunteer form from the PASFAA website at www.pasfaa.org. Feel free to contact any Council member or committee chair if you have questions.

Lastly, if you were unable to attend this year's conference at Hershey, I hope you will make plans now to attend next year's conference at Seven Springs Resort. It promises to be another great conference with many informative sessions and fun activities planned for everyone. Our featured speaker will be Homer Hickam, author of the book, Rocket Boys: A Memoir (the 1999 movie "October Sky" was based on this autobiography). I am sure his homespun approach to life will challenge and encourage us all.

I hope that you and your loved ones had a joyous holiday season. If you have any questions regarding PASFAA, please contact me.

Sincerely,

[Signature]

Bob Thorn
PASFAA President

Below is the final report for the 2001-2002 fiscal year ending June 30, 2002. This information is provided to the membership in accordance with the By-Laws, Article III, Section 4.

### BEGINNING CASH BALANCE, June 30, 2001

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### TOTAL FUNDS

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### BALANCE (Total Funds minus Expenditures)

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### CASH ON HAND, June 30, 2002

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Submitted by: Ronald P. Dawson, Treasurer
2002-03 Election Results

I am pleased to announce the election results from the 2002 Conference recently held at the Hershey Lodge and Convention Center in Hershey, PA.

Elected to the position of President-Elect was Jean M. Walker, the Director of Financial Aid at Butler County Community College. Jean has been very active in PASFAA and brings a lot of experience with her. This position is a three-year commitment, and I am confident that she will provide great leadership for the Association.

Elected to the position of Vice-President was David R. Smedley. Currently the Director of Financial Aid at Valley Forge Military Academy and College, David has been involved in a number of activities the past few years and has a great personal interest in government relations issues. He has served on the Government Relations committee and as Vice-President, he will be the Chair for that committee for the next two years. I am sure David will be an active vice-president and keep us aware of the upcoming Reauthorization.

Elected as Secretary for the next two years was Kimberly J. McCurdy. She is currently the Assistant Director of Financial Aid at Mansfield University of PA. Kim has been on a number of committees and is excited about being Secretary. She has an interest in journalism and already is doing a good job on keeping minutes for the Council meetings.

Elected as Treasurer for the next two years was Sheryle A. Proper. She is the Associate Director of Financial Aid at Allegheny College. The Treasurer does an important job for PASFAA, and Sherry has a great interest in dealing in fiscal management matters. I have already seen that Sherry has the right dedication to be a good Treasurer for the Association.

Elected to the position of At-Large Sector Representative was Margaret F. Hynosky, who will serve a two-year term. She is Associate Director of Financial Aid at the University of Scranton. Margaret served in this position for 2001-02 completing the final year of a two-year term when her predecessor had to step down. She has been active in PASFAA for a number of years and is looking forward to working in this position to help improve the Association.

Since no one ran for the Business, Trade and Technical Sector Representative, Robert Thorn, PASFAA President, appointed Stephen Helfrich, Associate Director of Financial Aid at York Technical Institute, to fill the position. The appointment was approved by Council for a one year term.

Thanks to all members who ran for office this year. It's not too early to think about running for an office or sector representative for next year. All sector rep positions, except the at-large sector representative, are up for election next year in addition to the president-elect.
A record 562 conferees came aboard the PASFAA Express during the annual conference October 20-23 at the Hershey Lodge and Convention Center. Conferees found seven tracks to follow (or jump) throughout the conference: Professional Development, General, Technical, Experienced, Graduate, Novice, and Loan Issues. Examples of the many options included Analyzing Tax Returns, Would You Want to Be Your Own Customer?, 'C' Codes, Enrollment Management, E-Signature, Graduate Cost of Attendance, The Financial Aid Team - Steps to Success, One-Stop Shop, Program Reviews and Audits, Using Your Skills for Professional Advancement, Section 529 Plans, Cost of Borrowing, Program Reviews and Audits, Reauthorization Issues, Communicating with the Millennium Student, and Consortium and Contractual Agreements, just to name a few in each category. Whether a newcomer to the membership or a 'Soothsayer,' this year's attendees found sessions of interest for everyone.

Registration began on Sunday afternoon, as did the first group of concurrent sessions. Those arriving in the lobby were greeted by specters of conferences past (no, this isn't a reference to the Council members who served as greeters!) garbed in PASFAA attire and conference bags from through the years. These were followed by the opening business meeting, which included prizes for some lucky attendees! Then came the President's Reception and the opening dinner where members renewed friendships and first-time attendees were welcomed to the group. Dessert entertainment was provided by Phalanx, Elizabethtown College's premier men's a cappella group. This student-directed vocal ensemble was a hit with the audience! After dinner, conference attendees were free to check out the Lodge's various entertainment options and enjoyed receptions sponsored by our lender partners.

On Monday, the Express stopped for sector meetings and 24 sessions from which to choose. Monday's luncheon featured Assistant Secretary for Postsecondary Education, Sally Stroup, with an update on projects that the Department of Education is currently pursuing. Former U.S. Congressman, William Goodling and PHEAA President and CEO, Michael Hershock recognized Ms. Stroup for her years of service to the financial aid community. After such a busy day working on the railroad, conferees relaxed at happy hour in the Exhibit Hall with the vendors. This was followed by dinner featuring guest speaker Kathleen Smith, the former federal relations director for PHEAA and now a Professional Staff Member for the Majority Staff and working for the House Education and the Workforce Committee. Resort entertainment and more receptions rounded out the evening.

Tuesday found the Express stopping at the computer users segmented meetings. These were followed throughout the day by 18 more sessions to choose from. Tuesday morning...
Stop in Chocolatetown

also featured the fabulously entertaining Capitol Steps! They provided some welcome hilarity in the midst of the conference, with their admitted politically incorrect irreverent humor. Tuesday’s highlights also included the annual Membership Luncheon, where a number of PASFAA members were recognized for their volunteer efforts. The closing business meeting brought the passing of the gavel to PASFAA’s 35th President, Bob Thorn of California University of Pennsylvania, and featured many generous prize giveaways from the vendors.

Tuesday evening was capped off with a ride on the fun Circus Train! Conferees were invited to try their hand at a variety of carnival games to win cool PASFAA prizes. Also on board the circus train were a magician and clown and yummy carnival snacks. Finally, photos were available for friends and colleagues to remember another fun conference.

On Wednesday morning, attendees enjoyed looking through the pictures from the Circus Train on the way into the federal and AES/PHEAA updates. These sessions marked the end of this year’s conference. Afterwards, attendees picked up their box lunches and headed home to mark next year’s PASFAA Conference on their calendars for October 19-22, 2003 at Seven Springs Mountain Resort.

PASFAA extends a big thank you to all of our conference sponsors who supported the conference activities and made this year’s conference such a sweet success! The Conference Committee extends our appreciation to all of the vendors, presenters and members who contributed so much to this year’s conference through your involvement. Thank you! See you next year in Seven Springs.

Conference photos throughout this issue courtesy of Donna Cerza, Alisa DeSifiano, Greg Gearhart, Linda Malchano, Tim McGowan Studio, Mary Miller, Michiale Schneider.

Ronald McDonald House Benefits from Conferees’ Generosity

Submitted by Joetta Bradica 2002 Conference Committee

PASFAA conference goers generously supported this year’s community service project for the Ronald McDonald House in Hershey. The 2002 Conference Committee would like to thank everyone who contributed in any way. Its success reached far beyond our expectations. We presented Todd Laser, house manager, a check for $720 and loaded his van with 14 boxes of donated toys and supplies for the house. A special thanks to the group from Reading Area Community College, who collected over $100 for this project along with donations of toys and supplies. Congratulations also to our raffle winners, Joan Holleran, who won the luggage, and Scott Miller who won the footlocker.

PASFAA received a lovely thank you letter from the Ronald McDonald House Charities of Central Pennsylvania indicating their appreciation of our support in helping them to provide a ‘home away from home’ for families during the difficult time of their child’s illness and hospital treatment. The overwhelming support for this project just confirms the generosity and dedication that is so characteristic of the PASFAA membership.
2002 Membership Service Awards

Submitted by
Gary Means
Past President

The Membership Luncheon was held on October 22, 2002 at the Conference and we recognized a number of members who volunteer to make this organization successful. Volunteerism was an important issue for me the past year and I was glad to see so many people willing to volunteer to serve PASFAA. At the luncheon, we gave out some special awards to a few members to recognize their exceptional service to PASFAA.

Distinguished Service Award

The Distinguished Service Award is a special award given to an individual who has provided exceptional service to PASFAA over the years. It is not based on just one activity but is based on continual service to the financial aid profession.

This year’s recipient, P. Vincent Raccula, has been involved in this profession for over 30 years and has provided great leadership and assistance to our Association. Vince started as a graduate assistant in Edinboro’s Financial Aid Office, worked in the public schools for one year and then joined PHFIA in the State Grant area, first as a Government Career Trainee and then as an Administrative Officer. He followed that with a year in the FAO at Carnegie Mellon and then returned to PHFIA as Coordinator of Financial Aid Office Services helping to develop the remote network in programs such as Need Analysis, DataLink, and OneLink. In 1999, Vince was appointed Senior Vice President for State & Federal Programs and continues in that role today. Many of us have had the pleasure to work with Vince, and I have always found him to be easy to talk to, as well as a caring and knowledgeable person. He is well deserving of this recognition.

Leadership Award

The Leadership Award is given to those individuals who have provided outstanding leadership to our organization in the past year. This year, the award goes to Ken Grugel, who is the immediate past Vice President of PASFAA and is the Director of Financial Aid at Clarion University of PA. Ken has served on a number of committees over the years and most recently has been the chair of the Government Relations Committee. Ken was instrumental in creating the Legislative Guide that won a NASFAA State Award this past year. Also, when the prior PASFAA vice president had to step down, Ken agreed to finish the year left on the term and was elected to a two-year seat after that. Ken also served as faculty for the Don Raley Summer Institute this past year and will serve again next year. Congratulations to one of PASFAA’s fine leaders.

Emerging Leader Award

PASFAA Council created this award to help encourage and give recognition to those newer members who have shown interest in being involved in PASFAA and have been active on committees or other activities.

This year the award goes to Brian Blackburn from Widener University. Even though he has only been in aid three years, Brian has already shown his desire to be active in PASFAA and has served on a few committees. He has been on the Newsletter Editorial Board and the Financial Aid Awareness Committee. This year he steps into the role as Chair of the Financial Aid Awareness Committee. Brian also attended the Leadership Training held before the conference. Thank you, Brian, for taking the initiative to get involved early on in your career.
President's Award

This award is given by the PASFAA President to recognize an individual who has provided exemplary service to PASFAA and assisted the president in carrying out his or her goals for the Association.

This year’s recipient has been very active in PASFAA and always made herself available to me during my term as president to bounce off ideas and ask her opinions. She served as Chair for the first Leadership Training Seminar and is the President-Elect of PASFAA. She is a prime example of someone finding and making time to volunteer and contribute to this Association. I admire her for her hard work and dedication to PASFAA. This year’s recipient of the President’s Award is Jean M. Walker, Director of Financial Aid at Butler County Community College.

Congratulations to all the Award recipients. Thanks for your contributions to PASFAA.

PASFAA Wants You to Help Improve Federal Student Aid Programs

Uncle Sam and Uncle PASFAA want you! Yes, you – to offer comments and suggestions on how the law that governs federal student aid programs could be changed, in your view, to better assist students. The law which governs federal student aid programs, known as the Higher Education Act of 1965, comes up for “reauthorization” in Congress next year. This process provides Congress with the opportunity to make changes in the existing law. NOW is your time to be a part of this process because, as working financial aid professionals, you have firsthand knowledge of how federal student aid programs work, and no doubt have suggestions about how it could be changed to make it better – for students AND for financial aid professionals such as ourselves.

NASFAA and EASFAA have been active in gathering proposals for reauthorization, and PASFAA will be joining the call, too, with your help. I want to challenge everyone who reads this message to think about how you would make changes in the existing law governing federal student aid programs – what you would change and how? Doing so does not have to be sophisticated – in fact, it can simply take the form of jotting down an idea or two that you think might work.

Think about how you would change federal student aid programs. Then send your idea(s) to be by email at dsmedley@vfmac.edu, or fax it to me at (610) 989-1596. I will compile all ideas received in order to prepare a position statement on HEA Reauthorization for PASFAA. No idea is too small or insignificant. We would like to hear from a cross section of financial aid professionals – especially support staff and counselors, in addition to those in the administrative hierarchy of FAOs. We all serve students, so think about how we could improve federal student aid programs to help more students to pursue post-secondary education.
Award Recipients Express Thanks

Dear Friends and Colleagues:

I want to thank the PASFAA membership for honoring me with the Distinguished Service Award at our recent conference. Being recognized by the Association with this award left me speechless, and those of you who know me would find that to be extremely unusual! My few words of thanks at the podium do not come close to describing my heartfelt appreciation for this honor.

I am truly blessed to have a career that afforded me an opportunity to work with such outstanding and caring professionals as those in PASFAA. Since attending my first PASFAA conference in 1975, I continue to be inspired by the many lifelong friendships we share and the camaraderie that exists in our state organization. I share this award with the many dedicated members of my staff, and those past and present with whom I have worked in the aid community. Serving PASFAA has been a privilege and I look forward to continuing to work together as advocates for higher education in the Commonwealth.

Once again, my sincere thank you to the PASFAA membership for this award and for your continued support and friendship.

P. Vincent Racculia, Executive VP, State Grant & Federal Programs, AES/PHEAA

Dear PASFAA Colleagues,

This note is to express my heart-filled thank you for presenting me with 2002 PASFAA Leadership Award.

As a member of our organization for the past 26 years, and having been involved with many programs and activities, I must say that receiving this recognition is the capstone of my professional career in the field of financial aid administration.

Again, allow me to say ‘THANKS’.

Kenneth E. Grugel, Director of Financial Aid, Clarion University of PA

Dear Gary,

I was both honored and touched to be presented with the President’s Award at this year’s conference. As I see it, my service and contributions to PASFAA pale in comparison to the benefits I have reaped in return. I credit PASFAA and its members for my professional growth and development, and I will always appreciate the mentoring and professional advice you and other Association members have so selflessly given to me over the years.

Serving as Chair of the Leadership Development Committee this past year was both exciting and rewarding. Knowing that I would be directly involved in developing training for future PASFAA leaders while accomplishing one of Council’s long-standing goals was very satisfying. The Leadership Training was a success because of Council’s support, the hard work and dedication of my fellow committee members, the willingness of the presenters to donate their time and talents, and the enthusiasm of the participants. I am grateful to everyone who was involved with the project and thank you all for your contributions.

Congratulations to you on a successful year as PASFAA’s 54th President. I am looking forward to serving on Council with you during the coming year, and again, thank you for this wonderful recognition.

Jean M. Walker, Director of Financial Aid, Butler County Community College

Dear Gary, Members of Council and PASFAA Members:

Words cannot begin to express how much I appreciated being selected as the recipient of the 2002 Emerging Leader Award. While sitting and listening to Gary give his presentation, I did not realize he was talking about me. There are so many deserving people that this award is not solely mine, but belongs to each and every volunteer who gives so freely of their time and talents.

Thank you to everyone who has encouraged me to become more involved, especially the best mentors an aid professional could ever ask for: Gary Means, Ethel Desmarais and Valerie Mockus. I hope that I can someday provide the leadership that these individuals have given to me.

Again, thank you for honoring me with this award. The plaque is hanging in my office and serves as a daily reminder of the value of volunteering.

Brian K. Blackburn, Financial Aid Counselor, Widener University
This article begins a series of reflections about the business of financial aid from a variety of viewpoints.

From the Perspective of a New Professional

All aboard? Prior to attending my first PASFAA conference, it almost felt like I was running behind the train, instead of boarding it with all the other "passengers." I have only been a professional in the financial aid field for about six months. I have had prior experience in financial aid as a work-study student and a graduate student (at IUP), adding up to nearly six years of exposure to the field. I was anticipating the conference with much excitement, excited to meet new people in the profession, network, and learn and share new ideas. It doesn't take long to realize that as much as you think you know in the profession, there is always something else to learn.

As a new professional, I attended the Fundamentals Workshop prior to the conference. The presenters did a terrific job of giving an overview of financial aid. Once the conference started and everyone arrived, the excitement grew. I was eager to meet new people, but a little intimidated by the experienced professionals. Throughout the conference, my nervousness and worry were put at ease as I met so many friendly and knowledgeable people. Meeting the professionals who have been in this field for more than 35 years was extremely inspiring to me. In fact, meeting those in the field more than five years was inspiring! I was one of the very few who said, "I want to go into financial aid as a career." No, really, I did say that, and yes, people did look at me as if I were crazy.

Attending the PASFAA conference and meeting people in the field was a great opportunity for me. PASFAA is a great way to meet new people, network, and share ideas, which is exactly what happened at the sessions I attended. I found them to be very informative and valuable to me as a new professional. I had a hard time choosing which session to attend because there were so many good sessions offered. I had an excellent time at the conference thanks to the conference committee, the vendors/sponsors, the presenters, and the other attendees. There is so much to learn as a new professional, and I am truly fortunate I had the prior experience and mentors who were so willing to help me learn. This field can be so intimidating and overwhelming to a new professional, but by finding the right networks, identifying mentors, and having a willingness to learn, I have found that you can thrive in this profession. I am looking forward to many more years in financial aid, meeting new people, and getting more involved with PASFAA. I can't wait until next year's conference!

The "What Would You Do?" series explores situations involving professional judgment, ethical questions or other sticky issues. Send suggestions for future topics to the editor.

What Would You Do?

Submitted by Judy Rilee
Newsletter Editorial Board

Here's the scenario: The student and her parents complete the FAFSA during January of her senior year in high school and submit it to the processor. In February, on her 18th birthday, she moves out of her parents' house and moves in with a friend. When she gives you a copy of her SAR, you see she is selected for verification. The parents, when contacted, refuse to give you any of the verification documents, because she is no longer living in the household. She claims she moved out of the household because they 'didn't get along' and wants to be considered independent because she does not rely on them for any financial support. She has a part-time job, but relies on the generosity of friends for food and housing. There is no documentation of physical or emotional abuse.

What do you think - is she dependent or independent? What would you do?
2002-03 Training Programs Offer Something for Everyone

The 2002-03 training year is offering a variety of programs designed to meet the varied training needs of our membership. From novice to veteran, our goal is to provide events that will enhance our professional development while simultaneously serving as a vehicle for networking within our profession.

The year kicked off with the **Fundamentals Workshop** and **Leadership Development Training**. Both events were conducted on October 19-20 preceding our annual Conference.

The **Fundamentals Workshop**, held at the Hershey Lodge, provided 38 attendees with an overview of basic financial aid principles and offered guidance on interpretation of policies and procedures. The levels of participants’ experience ranged from one week through one year. All benefited from the expertise of our faculty. Brandi Darr and Alisa DeStefano, who did an excellent job. Many thanks to them for sharing their time and talents. Thank you to the committee chair, Linda Malchano, and committee member, Wendy Dunlap, for the efforts involved in orchestrating the training event. Also, much appreciation is extended to our friends, Diana Sheehan and Tina Reinholtz, both of AES/PHEAA, for all that they do to ensure the success of this program.

Under the leadership of Jean Walker, Chair, the first **Leadership Development Training** program was conducted at the Hilton Garden Inn, Hummelstown, PA. Twenty program participants, who aspire to develop as leaders within the organization, were offered an excellent opportunity to “learn from the pros.” The presenters offered attendees their experience and guidance on very pertinent topics. Included was a panel discussion involving the shared experiences of those who have held leadership positions in PASFAA, EASFPA and NASFAA. For additional information on this very successful training event, see Jean Walker’s article in this newsletter. Thanks are extended to the Leadership Development Training Committee, presenters and PASFAA Council for their efforts and support of this very worthwhile program.

The annual **High School Counselor Workshops** were conducted throughout the state during the month of November. This annual event is planned and presented as a cooperative effort by PASFAA and AES/PHEAA. Chair, George Gerhart, reported 39 sessions were conducted to audiences of high school counselors and others who work with higher education bound individuals. Hats off to all who shared in the event by preparing, presenting, staffing binders or serving as site registrars.

The **Teleconference**, lead by Kim Adamson, Chair, will be held on Friday March 14 from 10-12 noon followed by a chat session from 1-2 p.m. The Conference is entitled “Eyes on the 1’s.” This promises to be an interesting session focusing on tax issues (excluding verification) and international student issues.

**Juli Louttit**, Spring Training Chair, announced **Spring Training** will be held both in the east and west during April 2003. The western event is scheduled for Wednesday, April 9 at the Sheraton Inn, Worrendale. The eastern session is scheduled for Wednesday, April 16 at the Drexel Brook in Drexel Hill. The committee has requested your input for sessions by distributing surveys to our membership. Please remember to complete the survey and share your ideas and interests.

One final note - on behalf of the Training Committee, I would like to extend our best wishes to our colleague, Randy Harmon, who is relocating to California. Randy has served PASFAA in many capacities including Training Chair during 2001-02. Most recently he served as the 2002-03 Chair of the Intermediate Training Committee. During his 8 years of service to PASFAA, Randy has left his legacy of mixing hard work with good humor. He is known as a coach, a mentor and a good friend to many of us and will truly be missed. Good Luck Randy!
High School Counselor Workshops Wrap Up for 2002

Submitted by
George Gerhart
Chair, High School Counselor Workshop Committee

The annual high school counselor workshop series was conducted in the fall at 39 sites across the state. PASFAA members and the AES/PHEAA Regional Directors presented the sessions to approximately 1,700 counselors from high schools and other agencies.

Evaluations by the attendees were extremely positive. The binder with the workshop information and related materials that was given to each counselor was deemed to be extremely helpful for use as a resource throughout the year.

The success of the workshop is due to the many PASFAA volunteers and AES/PHEAA staff members who served on the committee, prepared the materials and the binders, and served as presenters and registrars of the sessions.

Committee Members:
George Gerhart (Chair)
Maryann Dudas
Steve Fekete
John Gorman

Jennifer Liedtka
Donald Shade
Dana Suter

Clarke Paine speaks to high school counselors at the Elizabethtown College site.

Binder Preparers:
Wendy Dunlap
Cindy Farrell
Cheryl Gerber
George Gerhart
John Gorman
Donna Hoffman

Thanks also to Vee Blaine and Karla Roach at AES/PHEAA who directed the printing and its distribution, and to Dan Johnston who created the Powerpoint presentation. (Editor's note: Thanks to Dan Johnston and Bruce Diefenader for photo coverage.) Thanks also to the students and staff members at Penn State-Shenango.

Binder Preparers:
Dan Johnston
Kerry Paolletta
Jordan Peterson
Patty Peterson
Amy Sloan

Presenters:
Thomas Ball
Bonnie Lee Behm
John Bleryla
Kathryn Blaisdell
Cheryl Browning
Jim Cardinale
Sandra Cronin
Peter D'Annibale
Brandy Darr
Bruce Diefenderfer
Cindy Farrell
Anita Faust
Greg Gearhart
George Gerhart
Ragan Griffin
Patty Hladio

Melissa Ibanez
Dan Johnston
Jennifer Liedtka
Christina Marrone
Curt Marshall
Sally Ann McCrea
Kimberly McCurdy
Ellen McGuire
Gary Means
Tom O'Donnell
Tim Opgenorth
M. Clarke Paine
David Pearlman
Pete Rautzhan
Liz Rihl Lewinsky
Judy Rile

Julie Salem
Don Shade
Stanley Skrutski
Amy Sloan
David Smedley
Nan Sinski
Steve Stere
Barb Struble
Dana Suter
Jim Treiber
Christopher Vaughn
Melissa Walsh
Joan Willertz
Christine Zuzack

Registrar:
Dottie Brehm
Cheryl DePaolis
Sheree Fecto
Cheryl Gerber

Jane Gilbert
Carolyn Julian
Bill Kellaris
Lisa Kend

Bernard McCree
Kyle Mosley
Mirtha Wilczynski

Jim Treiber checks his notes at the Gannon University location.

Peter D'Annibale reviews the financial aid process with high school counselors.
First Leadership Development Training a Success

Submitted by
Jean Walker,
Chair, Leadership Development Committee

PASFAA's first ever Leadership Development Training was held at the Hilton Garden Inn in Hummelstown, PA, on Saturday and Sunday, October 19-20, 2002. The event was planned as a pre-conference activity prior to PASFAA's annual conference held this year October 20-23 at the Hershey Lodge and Convention Center.

The inaugural training workshop was limited to 20 participants who were selected based on recommendations from the eight sector representatives with input from PASFAA officers and committee chairs. The training was tailored for individuals with 3-15 years financial aid experience who were thought to have the potential and aspiration to develop as leaders within the Association. As graduates of the Leadership Development Training, the participants will be expected to take on a more active and stronger participation within PASFAA.

Participants included the following individuals:

Kim Adamson  Cedar Crest College
Margaret Barton  CCAC, Allegheny
Brian Blackburn  Widener University
Marguerite Borst  Albright College
Valerie Carles  Juniata College
Jeanne Cavalleri-Grover  Chestnut Hill College
Donna Cerza  College Misericordia
Patty Cegelka  University of Scranton
Debra Cross  Educaid, a First Union Company
Karen Fox  Lancaster Bible School
Mary Gazal  California University of PA
Michael Grover  National Education
Randy Harmon  King's College
Heather Kuhn  Pennsylvania State University
Annette Kelly  Delaware County Community College
Jennifer Liedtka  Lebanon Valley College
Bernard McCree  Thaddeus Stevens College of Technology
Kimberly McCurdy  Mansfield University
Stacey Vascavag  Arcadia University
Melissa Walsh  Villanova University

The training sessions, along with the presenters, are listed below:

Encouraging Teamwork, Time Management and the Art of Delegation
Gary Means  Westmoreland Co. Comm. College

Dealing with Conflict
Valerie Mockus  The College Board

Regulatory/Government Relations Issues
Scott Miller  AES/PHEAA

How to Run a Successful Meeting
Mary Miller  AES/PHEAA

Leader as Coach/Mentor and Other Effective Leadership Styles
Jean Walker  Butler County Community College

Leadership Roles Within PASFAA, EASFAA, NASFAA
Bill Burke  University of Scranton
Bill Irwin  Lock Haven University of PA

Selling your Staff and Administration on your Participation in PASFAA, EASFAA, NASFAA
Rachael Lohman  Wilkes University
Mary Miller  AES/PHEAA
Chris Zuzack  Indiana University of PA
David Knapp, Ph.D., President and CEO of Clear Ideas Consulting in Englewood, CO, was the keynote speaker at dinner on Saturday evening. Dr. Knapp has conducted leadership training throughout the United States and Europe and presented The 12 Myths of Leadership for the attendees.

The training event was very well received. The written evaluations received from the participants were as positive as the verbal feedback we received during and following the training workshop. Based on the feedback from the participants, committee members, and presenters, I am happy to report that Council approved the continuation of the leadership training for future offerings. The training will be offered again next year and then on an every other year cycle after that.

The 2002-2003 Leadership Development Committee under the direction of Chair, Lisa Kendi, will use the comments and suggestions received from this inaugural training to revise and revamp the leadership seminar for next year. Look for information regarding the 2003 Leadership Development Training in future Newsletter articles, on PASFAA’s website, and through announcements in the PASFAA electronic bulletin board.

I very much enjoyed being involved with such a fun and worthwhile project. I want to thank Council for their support and for giving me the opportunity to be chair of the Leadership Development Committee. The committee members including Lisa Kendi, Bill Burke, Gary Means, Mary Miller, and Valerie Mockus were all great to work with, and I want to thank them along with the presenters for their hard work and dedication in making the event successful. The participants were all enthusiastic and eager to learn, and I am confident that we will see these individuals making great contributions to PASFAA in the future.

### PASFAA Scholarships Awarded at Conference

Submitted by
Bob Thorn
PASFAA President

Once again, PASFAA awarded 10 scholarships for $1000 each to member schools at the annual conference. The recipients were selected at random from the membership list and did not have to be present to win. The following schools are this year’s recipients:

- Bucks County Community College
- Allentown Business School
- Pittsburgh Institute of Mortuary Science
- Bunker Hill Community College
- West Virginia University
- Montgomery County Community College
- Cabrini College
- University of Pittsburgh
- McCann School of Business and Technology
- Temple University
What Say Ye?
Nuggets of Wisdom from the Financial Aid Soothsayers

Financial aid royalty, of sorts, visited the 2002 PASFAA Conference to bestow their experience and 'pearls of wisdom' to the throngs of loyal financial aid subjects (okay, there were about 50 of us). Introduced in grand style was Her Majesty, the Queen (Rachael Lohman), Prince Vince (Vince Raccalia), the Wizard (Bill Burke), the Doctor (Bill Irwin), and the Gypsy (Anna Griswold), who made her appearance in the Magic 8 Ball as she was not in 'physical form' at the conference.

Although this session was designed to help novices understand the emotional battles of financial aid and how to get through the day without ulcers, most of the attendees were those with many years of experience under their belts and were hoping that the panel would be able to share from their wealth of experience on how to get through the day, period, and maintain long-term sanity. Here are the 'royal' soothsayers' suggestions:

"Wizard" Bill Burke's Quotes of Candor

Don't Shoot a Dead Horse
"Forgetting about the poor horse, the saying really means do not waste your time and energy." There are some 'processes that could waste a lot more time and effort for the rest of my staff.' For example, if a reduction in income will obviously not make a difference (i.e. $300,000 income is reduced to $150,000), the Wizard's institution won't encourage the family to pursue a special consideration reprocessing of eligibility.

My Secret Words
"I have some secret words that I am willing to share with you – please and thanks. While we certainly have authority and power over many that we deal with, we are not exempt from common courtesy. No one can use the word thanks too often. Use it at the end of every e-mail, memo and letter."

Don't Ever Give an Auditor More Than He or She Asks For
"Never volunteer information, unless specifically requested. Always provide summary information first. Only answer the question asked and do as briefly as possible. The only good question to ask an auditor is 'Why do you want that information?' Never ask an auditor how things are going during the course of a review. Moreover, remember always to say thanks at the end of a review."

"Prince" Vince Racculia's Musings

Perspective
"Keep everything in perspective. Deal with it, but don't dwell on it once it is handled. Don't get caught up in things you can't change. Do your job first. The more you worry about how others do their jobs, the quicker you will burn out in the financial aid environment."

It's About Education
"Remember that it is all about helping students get an education. If that's not your goal, you are in the wrong job. Your satisfaction has to come from your contribution, not from your compensation. You have to sincerely believe that the students you help now will eventually help make the world better for your grandchildren."

You're Not Alone
"Don't ever believe you're in this all alone. Working with people sharing the same 'lot' in life gives us a chance to commiserate with each other and find support and assistance on how to handle issues and problems."

"Doctor" Bill Irwin's Prescriptions

Turkeys
"One year we developed an idea in the office where we were going to get turkey stickers to put on the folders of students who proved themselves to be the biggest turkeys. Just having this plan among ourselves proved therapeutic as we could say 'potential turkey' after a particular trying encounter."

There Are Greater Concerns Out There
"Keep in mind it's important to not take situations too seriously. We are not curing cancer here. In the overall scheme of things, there are far greater concerns than some of the issues we expend considerable personal energy on."

Whose Fault Is It Anyway?
"Something the good doctor has observed with repeat offenders. 'If you have problems with your financial aid every year, then maybe the problem isn't with financial aid.'"

Regarding our own errors, Dr. Bill states, 'What is the worst thing that can happen if you make a mistake? (Because we are going to make mistakes; it is part of the human condition.) Since you probably won't be shot at dawn, getting fired is the worst thing, and how likely is that really?"
'Her Majesty, the Queen' Rachael Lohman's Gems of Wisdom

Out of the Office

'If you are assuming a leadership role that takes you out of the office, prepare your staff for your absence. Your absence should not create roadblocks for them in accomplishing their work. Do not expect your staff to do the work that you volunteered to do as a member of a professional association. Just because you decide to be 'involved' does not mean that your staff should inherit more work.'

Personality Test

'Know your staff's personalities. Some individuals work best on a 'need-to-know' basis while others like to know all of the possibilities and be part of the decision-making process.' You are working with individuals; treat them like individuals and be aware of their needs. Don't let your time out of the office short change your attention to your staff; they are the ones who will get it done when you are not there.

'Gypsy' Anna Griswold's Magic 8 Ball Insights

Ethical Dilemmas

'When faced with an ethical dilemma, always search for the high road. When you think you have found it, take that road. Always try to do the right thing and think about how your decisions will affect all the people who will have a stake in your decision. Admit when you make a mistake and don't dwell on the mistake.'

Teamwork

'We are not just administrators. We are educators. That makes you think a little differently about your role. We are infinitely better working as a team than working as individuals. When solving a problem, think about how you want the outcome to look... Plus, 'Never underestimate the value of humor and laughter in the workplace.'

As I sat listening to this panel at the conference (and I wish you could have seen it if you didn't) — it was quite interesting to see them in costume, especially Vince Raccula in tights. I found myself encouraged and relieved for a few reasons: 1) We all make and will continue to make mistakes — don't get hung up on this and move on. 2) We are all educators and not just administrators — we teach students responsibility and accountability. 3) It's important to keep everything in perspective — my job does not decide whether someone lives or dies. And finally, 4) it is very important to come up with humorous ways to deal with the day, and laugh — a lot — which you would have done if you had seen Vince Raccula in tights. Thanks to the panel for being good sports and for sharing their 'infinite wisdom.'

WASHINGTON UPDATE

Of Elections, Lame Ducks & Next Year

Submitted by
Scott Miller
Federal Relations
Director, AES/PHEAA

With the results of the November 5 election still being analyzed and scrutinized, Congress convened for a 'lame duck session' the week of November 12, 2002. From the time the gavel fell, it was clear that both Democrats and Republicans wanted to keep this lame duck session short.

To do so, they have, in effect, 'punted' final decisions on key issues to the next Congress. Most significant is their adoption of another long-term continuing resolution, rather than individual appropriations bills. This means that, for the time being, no increases have been approved for any federal spending programs related to higher education. Under the continuing resolution, funding is maintained at the levels approved for the 2002 Federal Fiscal Year. Congress still has a chance when it returns in January to finalize a more thoughtful package of appropriations bills, including those covering education programs. Whether they will be able to reach agreement on new funding levels in January is still an open question. So, we still do not know if there will be an increase in the Pell Grant maximum or in any of the other student aid programs for the 2003-2004 academic year and we won't, until sometime after Congress reconvenes on January 7, 2003.

It is also not clear if and how the results of November's elections will impact the upcoming reauthorization of the Higher Education Act. The one sure thing is that Senator Judd Gregg (R, NH) will lead the Senate's efforts on reauthorization in his role as the Chairman of the Senate Committee on Health Education Labor & Pensions (HELP). Senator Edward Kennedy (D, MA) is expected to be the ranking Democrat on the HELP Committee and will still play a major role in the reauthorization. No major changes are expected on the House side, but final decisions will not be made until early next year. Early speculation is that with the Republicans in control of the House, Senate and the White House, the reauthorization effort may be on track to be finalized in 2004. There had been some concern that partisan differences could have slowed the process down and stretched it out beyond 2004. Hearings should begin in earnest early in 2003 and continue at least through the summer. Legislative drafting may begin as early as the fall, especially on the House side.

For those of us in higher education, this means that we can't wait too long to advance proposals and identify issues of concern. Those proposals and issues should be transmitted as soon as practicable to your Members of Congress and Senators, to the education committees in the House & Senate, and to the associations that represent your interests in Washington, DC.
Annual Teleconference in the Works

Submitted by
Kim Adamson, Chair
Teleconference Committee

The annual Teleconference will be held on Friday, March 14, 2003 from 10 am to noon, followed by a live chat room from 1-2 pm. This is a change in time from prior years to accommodate our viewers on the West Coast.

Our theme this year is "Eyes on the I's: Income Tax and International Student Issues". We are fortunate to have representatives from the IRS and INS as part of our panel. Also, Scott Miller will be closing our teleconference with his Federal Update. Mark your calendars for this important event.

Financial Aid Handbooks Now Available with New Name

Submitted by
Kathy Myers
AES/PHEAA

2003-04 guides to financial aid are now available. My Mentor Guide to Financial Aid is the new name of the improved publication, previously known as Moving On to Higher Education.

The My Mentor Guide to Financial Aid handbooks are provided free-of-charge by American Education Services to students and their families who are interested in obtaining financial aid. The handbook provides information on financial aid options, how to determine one's financial need, how to apply for aid and what programs are available. It provides a checklist and timeline to aid students in meeting financial aid deadlines and offers information about online resources that can make the entire process quick and convenient. To order copies of My Mentor Guide to Financial Aid, please call 717-720-2509.

Default Prevention and Money Management CD Available

A new CD-ROM, Money Matters, is now available from YouCanDealWithIt.com to assist college graduates in gaining financial independence. The Money Matters CD provides interactive features to help young adults increase their financial literacy, avoid loan default and find loan repayment options.

Money Matters uses interactive worksheets, quizzes and calculators to help users in understanding their student loans, creating a realistic budget, managing debt and saving money. An in-depth section on student loans provides borrowers with information on their rights and responsibilities, loan repayment, grace periods, tax deductions and the consequences of default. Borrowers may also find the debt management portion of the CD especially helpful as they learn how to pay off credit balances and avoid the hidden dangers of long-term interest.

The YouCanDealWithIt.com Money Matters CD-ROM is available to students at their school's financial aid office or in a downloadable format accessible at www.youcandealwithit.com. The CD-ROM was also distributed at the Federal Stafford Loan Fall Workshops.

The YouCanDealWithIt.com Website is sponsored by AES in an effort to help recent and soon-to-be college graduates avoid student loan default. The site offers tips on résumé writing, job searches, apartment hunting, the pros and cons of buying versus leasing a car, information on savings, advice on credit card borrowing, links and calculators to assist in budgeting. Debt management, student loan tax advantages, career development and debt survival information was added as a component of the recent Website redesign. The site was launched three years ago in a proactive approach to lowering student loan default.
Financial Aid Awareness Activities

As of November 9, there are 51 volunteers listed on the Financial Aid Night Presenters Map on the PASFAA website under the Guidance Personnel subheading. Several more volunteers are still to be added with a call for more going out over the PASFAA listserve.

The National College Fair in Philadelphia on November 17 was fully staffed with 15 volunteers representing the PASFAA table. Brian Blackburn, Bonnie Behm and Chanel Greene along with AES/PHEAA representatives were presenters at the fair. AES/PHEAA staff discussed state funding while the PASFAA representatives covered federal and institutional funding. Special thanks for the volunteer who came from the farthest distance, Allison Seagle from Pittsburgh Technical Institute, who took time out from visiting friends in Philadelphia to work the morning shift.

The committee is exploring an online Financial Aid Chat Night as a supplement to our current activities. AES/PHEAA has given us tentative approval to use their office and computers as a base for this project. Committee members would serve as the chief responders, with some of our more seasoned PASFAA members invited to participate as well to provide the widest knowledge base possible. A tentative target date would be late January or early February.

Two openings exist on the Awareness Committee with a call going out to Western PA PASFAA members who might have an interest in helping cover activities in the western part of the state. The Awareness Committee for 2002-2003 currently includes:

- Brian Blackburn (Chair)
- Kathryn Blaisdell
- Patty Cegelka
- Mysty Dinger
- Patsy Hutchins
- Jamie Kosh
- Liz Rihi Lewinsky
- Keith New
- Christine Soda
- Mirtha Wilczynski
- Widener University
- Franklin & Marshall
- University of Scranton
- IUP - Culinary
- Haverford College
- Penn State - Altoona
- Arcadia University
- AES/PHEAA
- Arcadia University
- University of Scranton

What's New on the PASFAA Website?

Have you visited the PASFAA website recently? It is brimming with tons of new resources! Additions you may find worthwhile:

- **Conference Presentations:** There are 19 presentations from Hershey 2002 in the "Members Only" section. If you were unable to attend the conference or had a conflict with another session, you may find this a valuable resource. This is the first year that we asked presenters to submit their documents for web publication. We appreciate the Conference Committee's efforts to make this happen and the cooperation of the presenters.
- **PASFAA Volunteer Form:** Anyone interested in helping with the Association can print out the Volunteer Form and send it to Gary Means. It's never too late to get involved!
- **2002 Resource Guide:** The Resource Guide is available on the website in a color printable version. You will find it in the "Member Only" section. The Technology Advisory Group has distributed all the available guides. Anyone wishing to print and copy the guide may do so. We ask that you do not alter it in any way.
- **PASFAA Membership Directory:** Have you looked someone up in the Membership Directory and wished you could just click on the e-mail address to send a message from that page? The Directory has been upgraded to provide that link.

**Technology Tip:** Microsoft Word can help you find that perfect word. Use the thesaurus located in the Tools section (click on tools, language, thesaurus) or highlight the word you wish to replace and hit shift + F7. Word will provide you with a number of synonyms to use in place of your selected word.
News from EASFAA

Submitted by
Gary Means
EASFAA Liaison

EASFAA met in Burlington, VT on Sunday, October 27. The meeting was well attended and reports were given by committee chairs and state representatives. Listed below are some of the highlights of the meeting:

- Discussion of tax status for EASFAA
- Many states are active in training and other activities.
- Jeff Dannies, from Salomon Smith Barney, spoke on EASFAA investments.
- Conference 2003 at Hershey Lodge May 14-17 (Wed – Sat) with time to attend Hershey Park being reviewed.
- Membership is at 915 (Massachusetts at 244, New York at 151, Pennsylvania at 110).
- EASFAA Website is being updated – using separate group, ATAC, to do website and deal with membership issues.
- Graduate Symposium postponed until Feb 23-25
- Leadership Committee formed, chaired by Bill Irwin, developing a leadership plan—one idea is Council Orientation
- Volunteer process and committee selection is being reviewed.
- Training – 15 sites for Fall Training (FA dates are Nov 13 at Butler Co. Community College and Nov 20 at Immaculata University. Trainers will be Bill Irwin and Donna Cerza. Spring Training is being planned.

2003 EASFAA Conference Coming to Hershey

Submitted by
Mary Miller
AES/PHEAA

Come join your EASFAA colleagues at this year’s conference in Hershey, PA! From Wednesday through Saturday, May 14-17, the Hershey Lodge and Convention Center will be the site of the 2003 EASFAA Annual Conference.

Check out the EASFAA website at www.easfaa.org for the very latest in conference news. The conference committee has been hard at work since last August to plan a conference full of information-packed sessions, professional networking, exciting social events, and – of course – chocolate!

Make your reservations today to help EASFAA ‘Raise the Bar’ in Hershey!

NASFAA’S Best Practices Symposium Returns for 2003

Submitted by
Mindy Kaplan Eline
NASFAA

For the second year, NASFAA will host a training opportunity to explore critical issues facing financial aid professionals. *In Search of Best Practices – A NASFAA Symposium* will be offered as a day and a half symposium at four sites in 2003.

- **Orlando, Florida, February 9-10**
  Rosen Plaza Hotel, 9700 International Drive, Orlando, FL, (800) 627-8258
- **Minneapolis, Minnesota, March 30-31**
  Holiday Inn Select, 3 Appletree Square, Bloomington, MN, (952) 854-9000
- **Las Vegas, Nevada, May 21-22**
  Hampton Inn Tropicana, 4975 South Industrial Road, Las Vegas, NV, (702) 948-8100
- **Denver, Colorado, June 2-3, Regis College, in conjunction with the RMASFAA Summer Institute**
  Lodging information will be available at www.RMASFAA.org in March 2003.

Symposium topics will include Financial Aid Office Organization and Structure, Project and Resource Management, and Legal Issues. The subject matter will be targeted towards intermediate and advanced financial aid administrators who have high competency levels in the nuts and bolts aspect of each subject area.

The cost per registrant is $175 and includes one meal. Registration is available to NASFAA members only. For more information, hotel rates, and a registration form, visit www.NASFAA.org or call Judy Schneider, 202-785-0453 x144 or shneiderj@nasfaa.org.
The Past President’s Club recognizes the achievements of former leaders of PASFAA and appears periodically in the Newsletter.

Past President’s Club

featuring

Sheila Checkoway, PASFAA President 1987-88

Submitted by
Kimberly McCurdy
Newsletter Editorial Board

Like most financial aid professionals, Past President Sheila Checkoway never intended to pursue a career in financial aid – she ‘stumbled’ into it. Some 24 years later, she has put her stamp on financial aid in many ways.

Sheila’s official start in financial aid began in 1978. After earning her bachelor’s degree in English education from Northeastern University in Boston, and after several education-related jobs, Sheila was working as registrar for a small business college in Ohio. When her husband took a job with a small private college in Vermont, she applied for the Director of Financial Aid and Placement position that was vacant – and convinced them she was the gal for the job. The rest, as they say, is history.

In 1980, Sheila came to Pennsylvania as Director of Financial Aid at Albright College. Over the years, she gained the title of Associate Dean and changed the office name at that time to Student Financial Services to recognize the broader work accomplished with families. Sheila recognizes Renee Saleh as her mentor who ‘stood out when I first arrived in PA as someone well-respected, knowledgeable, and most importantly, willing to share information and help a fledgling financial aid officer. She always responded to my questions, but also made me think. I remember a few years down the road when Renee called to ask me a financial aid question. After responding to her, I realized that I had ‘arrived’ if the student had been able to help the teacher.’

And arrive she had. Sheila earned her master’s degree in Higher Education Administration from Lehigh University and became very involved in the PASFAA organization and the then PAATP training program. She served as PASFAA secretary and newsletter editor in 1986 and moved into the presidency for the 1987-88 academic year.

After 11 years at Albright, an opportunity presented itself to help build a counseling business from the ground up. Always interested in assisting families in understanding the financial aid process and college financing for their individual situations, Sheila jumped at the chance to do something challenging and exciting. Her company needed funding options for families and partnered with Knight College Resource Group. Soon the companies merged and Sheila moved back to Massachusetts. Knight became Key Education Resources, and she continues with the company today. I never pictured myself as a lender or a sales person, except I let folks know that my dad really did sell used cars, so it must be in the genes,” Sheila said.

Sheila has seen many changes in financial aid through the years and urges her financial aid colleagues to ‘embrace change. It’s the one constant – in financial aid and in life!’ Her secret to longevity? ‘Look for the constants, which can be few and far between. What can you have control over and what must you relinquish? Helping students and families finance their education is a very noble helping profession. Yes, it is long hours and dedication but I hope you can have fun with it – or find the rewards. I used to say that it only took one student’s thank you note to erase 10 of the not so nice appointments and comments. A glass half full approach goes a lot farther than half empty.’

Sheila urges folks to get involved. Every time she opens the PASFAA newsletter or a conference agenda brochure, she remembers helping to change those formats and improve the organization. Sheila challenges folks who would like to get involved to start thinking about skills you have that could help in some small way to get you started.

‘Some folks can only dream of finding work that interests them, challenges them, rewards them and constantly presents new opportunities. I’m very lucky to have found the niche that works for me. I particularly enjoy that what I do is cumulative; what I know and learned while in financial aid and working at colleges comes to bear on my work everyday as I meet with colleagues on campus, train new sales reps at Key, and help improve processes for staff and families in our office.’

Sheila would not change a thing about her career. Her motto is ‘no regrets’ and she finds she has none. As we thank Sheila for her years of continuing service to PASFAA, we appreciate the opportunity to get to know this past president. Her dedication and positive attitude through the years serves as an example to PASFAA members new and experienced.
Upward Bound!

Let Citizens Bank Be Your Students’ Launch Pad!
Citizens Bank is committed to helping make education a reality for your students. Our full line of Education Finance products and services includes low cost borrowing options and a FREE Student Financial Success Guide. We’ll make your job easier so your students can receive the attention they deserve. To discuss your specific needs, contact us today!

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“Ask the Expert - College Bound” Continues

Submitted by
Nancy Chalker
Newsletter Editorial Board

Once again, Citizens Bank sponsored ‘Ask the Expert – College Bound’ at KDKA-TV Pittsburgh and KYW-TV Philadelphia. The call-in hotlines, offered October 9 in Pittsburgh and October 16 in Philadelphia, were staffed with Financial Aid and Admissions representatives from area colleges and universities.

At both locations, over 300 calls were answered. Most callers inquired about admissions requirements, state grants and how to best save for college. During the Pittsburgh hotline, KDKA-TV aired a half-hour show consisting of three segments. The first segment covered Admissions/Testing/Choosing a College. The second segment was Financial Aid Overview: Steps in the Process, and the panel participants were Jim Popovich, Citizens Bank; Betty Davis. CCAC; Patty Mary Miller, AES/PHEAA. The third segment promoted our lender partners.

Without the support from local colleges and universities, we would not have been able to provide this valuable service to the community. Citizens Bank thanks the panel participants (listed above) and those individuals (listed below) who staffed the hotlines. It is reflective of their personal and professional dedication to higher education.

Hotline Panel Participants:

Allegheny College
Robin Szilas
Arts Institute of Pittsburgh
Lisa Harasyn
Carnegie Mellon University
Tiffany Aloi
Chatham College
Monique Davis
Penn State
Carrie Guerrini
Patty Brady
Robert Morris University
Kathryn Herbert
Mary Minahan
Stephanie Thompson
Mark Labbett
Steven Planey
Shari Payne
Saint Vincent College
Michael Hall
Comm. Coll. of Allegheny Cty.
Toni Ball
Margaret Barton
Duquesne University
Frank Dukovich
Indiana University of PA
Vonnie Hunter

LaRoche College
George May
Hope Schomberger
Pittsburgh Technical Institute
Alison Seagie
Doug Cerminara
Slippery Rock University of PA
Jim Zuzack
Patty Hladio
University of Pittsburgh
Barry Duerr
Cindy Henderson
Colleen O’Neil
Joanne Getsy
Western School of Health and Business
Ellen Randolph
AES
Michael Burke
Arcadia University
Stacey Vascavage
Elizabeth Rhii Lewinsky
Cheney University
James Brown
Community College of Philadelphia
Carmelo Miranda Lopez
Chestnut Hill College
Kristina Wilhelm

Delaware County Comm. College
Raymond Toole
Eastern University
Connie Mints
Holy Family College
Janice Helrick
Immaculata College
Serena Gayle
Lincoln University
Heather Sperratore
Nicola Thompson
West Chester University of PA
Dana Parker
Molly Leese
Widener University
Brian Blackburn
Neumann College
Joseph Henderson
Philadelphia Coll. of Osteopathic Med.
Bernadette Anyzech
Peirce College
Steven Bird
Rosemont College
Judith Rile
Temple University
Lisa Aubrey
Valley Forge Military College
Donna Speranza

Thank you to the following sponsors who are providing generous support for PASFAA activities for the 2002-03 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, Fleet, Key Education Resources, M&T Bank, National City, PNC Bank, Sallie Mae

Gold ($6,000 - $7,999): Academic Management Services, CitiBank

Student Loan Corporation

Silver ($4,000 - $5,999): Beneficial Savings Bank, Chase, Educaid-a First Union Company, Nellie Mae, Sovereign Bank, USA Funds

Bronze ($3,000 - $3,999): College Board, EdAmerica, Suntrust Education Loans, Wells Fargo EFS

General (Up to $5000): AllFirst Bank, College Loan Corporation
STATE SYSTEM of HIGHER EDUCATION SECTOR

Many thanks are in order for several in our sector. Thanks to Dana Parker as he completed his term as Past-President, and to Bob Thorn who now serves as PASFAA President. Our thanks also go out to Kim McCurdy who is the Association's Secretary. We also have many sector members who chair and serve on committees, and who also have taken active roles in both EASFAA and PASFAA.

PASFAA Executive Council met on November 10-11 to begin a busy year for the members of the organization. Thanks to all the lenders who volunteered for the coming year. Although many of the committees are full, we are looking to place as many volunteers as possible throughout the year.

PELA Lenders live an excellent live website presentation at the PASFAA Conference. All PELA representatives helped in displaying our new look and feel of our web data. We have to emphasize this one more time - whenever there is a change made to the Alternative Loan products of a Lender organization, you will see these changes updated immediately. Your lender representative is responsible for the accuracy of the information concerning the products that they offer.

We have updated interest rate information to our site so Financial Aid Administrators can review current changes in Prime, Libor, and T-Bill. Visit us at www.pelalenders.org.

INSTITUTIONAL SUPPORT SERVICES SECTOR

PASFAA Executive Council met on November 10-11 to begin a busy year for the members of the organization. Thanks to all the lenders who volunteered for the coming year. Although many of the committees are full, we are looking to place as many volunteers as possible throughout the year.

PELA Lenders live an excellent live website presentation at the PASFAA Conference. All PELA representatives helped in displaying our new look and feel of our web data. We have to emphasize this one more time - whenever there is a change made to the Alternative Loan products of a Lender organization, you will see these changes updated immediately. Your lender representative is responsible for the accuracy of the information concerning the products that they offer.

We have updated interest rate information to our site so Financial Aid Administrators can review current changes in Prime, Libor, and T-Bill. Visit us at www.pelalenders.org. Coming in 2003 from PELA are some of the following items:

- The ability to e-mail a lender rep via PELA e-mail.
- The 'Ask PELA' column in the newsletter for questions on products or concerns.
- Ordering your entrance or exit materials from your lenders online.
- Online ordering of marketing materials for your students or materials for a high school night.
- Request a Power Point presentation from your lenders.
- John Southwood, formerly of Educaid/Wachovia has undergone yet another surgery on his back. Get well wishes can be sent to him at home to 1059 Wallace Avenue, Chambersburg, PA.

Coming to a Theater Near You!

15 lender organizations have made a commitment to sponsor the first ever Northeastern PA College Fair on May 5 at the First Union Center in Wilkes Barre, PA. PELA members are working hand in hand with PACAC to bring this event to Northeastern PA. Over 140 colleges and universities have already registered for the event, which will run the entire day in order to meet the expected demand.

And The Winners Are:

Five schools were the recipients of the PELA $1,000 scholarships at the recent PASFAA Conference. The winners that will bring back the money to their schools are:

- James Treiber - Gannon University
- Joan Holleran - Kutztown University
- Michael Sritie - Messiah College
- Cheryl Dufault - University of Pittsburgh/Greensburg
- Moneta Chylack - Ursinus College

PRIVATE SECTOR

I now begin serving the second year of my two-year term. Looking forward, I want to encourage my colleagues to consider becoming PASFAA's Private Sector Representative. If you are interested, please contact me so I may share with you the responsibilities and benefits of this position.

Our sector met December 19, 2002 at AES/PHEAA. The agenda included discussions on loan consolidation, TAP and Upromise.

Our state lobbying association, AICUP, provides me weekly updates that I disseminate to our group. If you are not receiving them from me, please contact me so that I may include your name on our list.

PASFAA held a Leadership Development Training workshop this year. One of the workshop goals was to provide training that would encourage individuals to seek leadership roles within our association. We look forward to hearing about the workshop and the benefits it has for PASFAA and our profession. There were a total of 20 participants and our sector was represented by the following people: Kim Adamson – Cedar Crest College, Brain Blackburn – Widener University, Marquise Borst – Albright College, Valerie Carles – Juniata College, Jeanne Cavalieri-Grover – Chestnut Hill College, Donna Cerza – College Misericordia, Patty Cegelka – University of Scranton, Karen Fox – Lancaster Bible College, Randy Harmon – King's College, Jennifer Liedtka – Lebanon Valley College, Stacey Vascavage – Arcadia University, Melissa Walsh – Villanova University.

Next year, the conference will include a longer period of time for us to meet as a sector. Please communicate to me topics that you would like to discuss. As always, I appreciate your comments and thoughts. Please continue sharing them with me.

INSTITUTIONAL AT-LARGE SECTOR

Hello to all in PASFAA Land. I want to thank all of you for giving me the chance (again) to serve PASFAA as the At-Large Sector Rep.

This year, Council will be trying to make the volunteer process more streamlined and effective. Council decided that the volunteer forms for 2003-04 will be available in Spring – earlier than in the past few years. Since some committee chairs would be forming their committees around that time and since some of the committees are on a different cycle, the information would be more accurate and timely. This will ensure that volunteers are considered to coincide with these cycles. Council has also asked the committee chairs to provide us with updated policies on length of membership for committees, procedures and duties. Please forward any suggestions or concerns that you may have to me at hynoskyml @scranton.edu or (570) 941-3925.
NURSING SECTOR
Submitted by
Tracey Wassel
Nursing Sector Representative

Here's to a Prosperous New Year for the Nursing Sector! I hope that everyone found peace, hope and love this Holiday season. Now, back to the one-man office task masters that we love to be. With the nursing shortage, we are now busier than ever and it becomes even harder to leave our office confines for meetings.

The eastern part of the state held their Fall meeting on November 15. My apologies for not being able to attend. I will hopefully make the Spring meeting in the East. The western part of the state held their Fall meeting on December 20. Issues continue to link the two parts of the state with lack of funding in the hospital budgets being a constant. We as a sector continue to struggle with the fact that money is just not budgeted for Financial Aid Administrators for yearly conferences such as PASFAA, let alone the ability to travel to a central part of PA for an 'East meets West' sector meeting.

Once again I implore you to be proactive in regards to Reauthorization. Let your views be known. E-mail PASFAA Vice President, David Smedley, at dsmedley@vfmac.edu. He is composing the PASFAA position paper. Remember to speak now or forever hold your peace, we don't tolerate reactive whining!

Next on my soapbox is the topic of volunteerism. We as a sector need to start getting involved. I am aware of the time out of the office aspect as well as the budget issue. But start small by volunteering to be on a committee. There are still a few committees looking for representation for this current 2002-03 year as I write this. Remember, PASFAA pays your expenses, except at conference time. This is a great selling point for your directors: 'You don't need to cover any of my expenses, just give me the day or days.' Look to the future and plan to volunteer for 2003-04. You can check out the committees and their functions on the PASFAA website under the policy and procedures section.

Good luck as you plan the upcoming academic year, as they vary for us all. It should be a busy one to say the least. Take care and remember to smile!

PUBLIC TWO-YEAR SECTOR
Submitted by
Mary Rosin
Public Two-Year Sector Representative

It was great to see so many of my colleagues from the Public Two Year at the recent PASFAA conference in beautiful Hershey! I was also pleased with the number of attendees at our sector meeting at the conference. We had over 50 members in attendance. A wide range of topics were discussed at the meeting including default prevention, awarding procedures and the new leadership development training. We also discussed possible presenters for the November meeting at the Best Western. Representatives from PHEAA have been invited to discuss Special Programs such as PATH, TANF awards, etc. We will also get an update from Educational Services on new initiatives.

As always, I thank all of you for your support within our sector and PASFAA. We have many members who are volunteers and leaders within the association. Please continue to offer your wisdom and guidance to the association. It is definitely worthwhile.

BUSINESS, TRADE & TECHNICAL SECTOR
Submitted by
Stephen Helfrich
Business, Trade & Technical Sector Representative

Greetings to all, and I hope you had a safe and happy holiday season. I am the Associate Director of Financial Aid at York Technical Institute in York. I am very pleased to have been appointed to represent our sector, and having been a PASFAA member for five years, I look forward to the challenges that lie ahead in this new position.

As history indicates, it has been a challenge for our sector to meet on a regular basis due to location and office constraints. In July of last year, approximately 12 B.T.T schools had formed a South Central PA sector branch to meet and discuss issues and concerns specific to our sector. We intend on meeting quarterly, and our next event will be scheduled for March 2003. I will have additional information available as far as where and when the meeting will occur in the near future. Those who have attended agree the meetings were beneficial. I also encourage the remainder of the sector to consider forming other sector branches, appoint team leaders, and have those persons convey your issues and concerns to me so I may convey this information to the PASFAA Executive Council. Feel free to contact me for suggestions as to how to start the process.

I realize that not all of us may be able to meet on a regular basis, but it is very important that we embrace the opportunities we have as a group to work together. Believing not only each individual school, but our sector as a whole. I encourage you to contact me with your concerns, questions and issues you may have. I also encourage you to get involved and participate in PASFAA. It will be worth your time and effort, can be reached by telephone at (717) 757-1100 ext. 356, or by email at helfs@yl.edu. I look forward to working with all of you during this upcoming year.

STATE-RELATED SECTOR
Submitted by
Robert Snyder
State-Related Sector Representative

Greetings to all in the state-related sector. For those of you who were fortunate enough to attend the fall conference in Hershey, I hope you enjoyed the time away from the office and meeting with your friends and colleagues.

At our sector meeting, we talked about issues that we are all facing such as significant increases in tuition and how to help students and families find ways to finance a college education. Clearly, additional loans are the way most students and their families are going in order to finance a college education. Most of the discussion focused on alternative loans and how different schools are working with various awarding agencies to provide the best options for their students. We also discussed making sure students are aware of the loan debt that they are accumulating and how credit card companies are very visible on our campuses. Again, thanks to all who participated in the discussion. It's always nice to hear how other schools are dealing with various issues that we all face.

I think those who attended PASFAA this fall at the Hershey Lodge and Convention would agree that it was a great facility for a conference. EASFAA will be holding its annual conference at the same location next May 14-17. Keep that in mind as you are looking at your travel budget. What a great opportunity it is to have the EASFAA conference in our own backyard.

If there are any issues that you would like me to present at a future PASFAA Executive Council meeting, please do not hesitate to contact me by email at rms5@psu.edu or by phone at (814) 863-0507.
FROM THE EDITOR'S DESK

This issue covers the recognition of PASFAA members chosen to receive service awards at the annual conference. We are an Association blessed with members who give of their time and talents to educate our membership and support higher education funding and ultimately, to better serve our students and their families. So it is fitting that the recipients of this year’s service awards were selected.

P. Vincent Racculla, this year’s Distinguished Service Award winner, has 32 years in student aid to his credit, Ken Gruegel, the Leadership Award recipient, celebrated 28 years in financial aid and Jean Walker, who received the President’s Award, has 16 1/2 years of service. Our “new kid on the block,” Brian Blackburn, recipient of the Emerging Leader Award, comes in with 3 years working in aid. But length of service is not the reason these faithful members were recognized for their accomplishments. It is the commitment and dedication they have shown to the field, and especially to our Association, that make them stand out as shining examples of why our Association is flourishing. We applaud them and thank them for their service.

Joan L. Holleran
PASFAA Newsletter Editor

PASFAA BULLETIN BOARD

Darcie Stephens, Mansfield University, and husband, Alan, welcomed the birth of Zachary Alan Stephens on September 15. Zachary weighed in at 5 lbs. 13 oz.

Dana French, National City, has decided to leave the banking industry for awhile to become a full-time mom to daughters, Jordan and Natalie.

Kristen Moore is the new Assistant Director of Financial Aid at Swarthmore College.

Tonya Anthony filled the Assistant Director of Financial Aid position at Millersville University of PA.

Congratulations to Erin Fritz, Seton Hill College, and husband, Ryan, whose second child, a baby boy, was born on September 29.

Ragan Griffin, Clarion University of PA, and husband, Sean, welcomed their second son, Quinlan Peter, on September 27. Quinlan weighed in at 6 lbs. 3 oz. and joins big brother, Aidan in the Griffin household.

Farewell to Randy Harmon, formerly at King’s College, who is relocating to California.

Congratulations to MaryKay McCaughan, Villanova University, who married Phil Klara on October 19.

Sally Treadwell, formerly with PNC, joined the staff at SunTrust as Account Executive. PASFAA also extends condolences to Sally, whose mother passed away October 27 after a lengthy illness.

Shawniquë T. Kent, formerly at Valley Forge Military College, gave birth November 11 to an 8 lb. 2 oz. baby boy, Bryce Alexander Kent.

Donna Speranza, formerly at Harcum College and St. Joseph’s University, is now Assistant Director of Financial Aid at Valley Forge Military College.

Condolences to the family and co-workers of Carolyn Dent, Bryn Mawr College, who passed away October 7.

Diane Pelli, formerly at Harcum College, joined the staff at Widener University, as Associate Director of Financial Aid.

Danell Schoemaker, formerly at Reading Hospital School of Nursing, is the new Student Accounts Coordinator at Berks Technical Institute.

Chris Richardson, formerly at Gettysburg College, is now an Associate Director at Bryn Mawr College.

The nursing sector welcomes two new financial aid officers. Rob Schalles filled the financial aid position at Conemaugh Hospital School of Nursing, and Rick Buren is at Washington Hospital School of Nursing.

Georgia Prell, East Stroudsburg University of PA, is now Director of Enrollment Services and Pheilis Swinson is now the Associate Director of Enrollment Services/Financial Aid. ESU also welcomes Terri Proctor who filled the Enrollment Services Counselor/Financial Aid opening.

Betty Davis, Community College of Allegheny County, has had a change of title and is now the Dean of Enrollment Management.

Condolences to Carolyn Speidel, West Chester University of PA, whose mother passed away November 13.

Congratulations to Dwight Horsey, Millersville University of PA, who was selected by Black Opinion Magazine, as one of its 2002 Black Achievers. He was one of 15 persons chosen for the honor because of their personal achievements and contributions to their profession, employers and local communities. A profile of Dwight and the other Achievers appears in the fall issue of the magazine.
2003 Conference Planning Begins

Submitted by Sheree Fetcho
2003 Conference Chair

Mark your calendar to join us at the 35th Annual PASFAA Conference at Seven Springs Mountain Resort from October 19-22, 2003. Although it seems like a long time away, planning has already begun! As was announced during the closing business meeting in Hershey, we will have the pleasure of hearing an inspirational story from our guest speaker, Homer Hickam, author of 'October Sky.' We feel honored to have such a special guest for our 35th Annual Conference! You can find out more about our special guest by visiting his website at: www.homerhickam.com or by reading one of his books:

(Book cover art reprinted with permission.)

The first official Conference Committee meeting will be held on December 8-9. Please send any session ideas or suggestions for next year's conference to one of the following 2003 Conference Committee members:

Sheree Fetcho, Chair
Donna Wilkoski, Co-Chair
Cindy Hall
Lisa Kendi
Bonnie Lack
Elena Lubimtsev
Linda Malchano
Patti McCarthy
George Santucci
Doug Vore

California University of PA
Bucks Cty. Comm. College
Point Park College
Fleet Bank
Carnegie Mellon University
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dvore@drexel.edu

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 October 23 and November 11, 2002 meeting on the PASFAA website at www.pasfaa.org or by contacting the PASFAA secretary, Kim McCurdy, at kmccurdy@mnsfld.edu.

"I thought I'd heard it all until..."

Submitted by Ron Dawson
Philadelphia University

We received the standard e-mail response from AES indicating that a student had successfully completed the loan entrance interview. We could not identify the student as one of ours, so we e-mailed the student to ask if he was planning to come or to inform him that he needed to do the session again with the correct school. His response was, "I'm sorry for the discrepancy, but I am actually enrolled at Carnegie Mellon University. I selected Philadelphia University in the window only because Carnegie Mellon was not an available option when initiating the Stafford Loan counseling session. Since Carnegie Mellon did not appear as an option, is there a way to transfer the credit?"
Activity Almanac

February - March
February 20
February 26
March 12
March 27
(Additional site yet to be determined at press time)

February - March
Need Analysis Workshops
PHFAA
Luzerne County Community College
Westminster College
Wexford Campus - Slippery Rock Univ. of PA
PHFAA

March 14, 2003
Teleconference: 'Eyes on the I's: Income Tax and International Student Issues'

April 2003
April 9
April 16

April 2003
Spring Training Seminars
Sheraton, Warrendale
Drexelbrook, Drexel Hill

May 14-17, 2003
EASFAA 2003 Conference, Hershey, PA

June 16-20, 2003
Don Raley Institute (for New Aid Administrators), Dickinson College

June 16-18, 2003
Intermediate Summer Institute, Dickinson College, Carlisle

July 9-12, 2003
NASFAA 2003 Conference, Salt Lake City, UT

October 19-22, 2003
PASFAA 2003 Conference, Seven Springs