

Pennsylvania Association of Student Financial Aid Administrators

PASFAA

NEWSLETTER

SPRING 1994

VOLUME XXVII

Dear PASFAA Colleagues:

As I pondered what to include in the cover letter for this issue, one of my hobbies come to mind, and I thought of how it impacts even on an organization like PASFAA. Those who know me are aware that the study of weather occupies some of my time. It is something that I have termed amateur meteorology.

By the time this newsletter gets to offices, we will hopefully have experienced some nice, Spring days; but as this is written, we are in our 45th day with snow-covered ground. That is a record or near record for the Harrisburg region according to the professional meteorologists. How does that relate to PASFAA?

It made me think of the spirit of dedication exhibited by those "volunteers" who perform the many functions of our organization. We just completed the scheduled Executive Council Meeting on Valentines Day, only two days after one of the worst snow storms of this winter or any other. Yet most Council members were undeterred and made the trip to Harrisburg for the two-day meeting.

The Hotline was conducted under the most unusual and adverse weather conditions in the history of that event. Ron Dawson who chaired that activity called several times from his home to give updates on the emergency conditions due to ice in Philadelphia and Harrisburg. Ron co-ordinated the event from his home, because icy winter conditions closed his institution. Yet he and the many hearty volunteers plunged on and conducted most of the four-hour evening shifts. In addition to our phone answerers, PNC personnel in Pittsburgh and Philadelphia and PHEAA staff in Harrisburg braved the elements to provide the necessary space and telephones. Pittsburgh volunteers were able to conduct all five evenings of call answering, and they were at times inundated because on a few evenings they were the only active 800 number. Statistics will reveal that the number of calls answered fell below normal activity, but proved to be higher than the "low" experienced during the Persian Gulf War.

The Guidance Counselor Workshop Series was lucky with weather conditions as November and early December presented none of the weather problems that have occasionally disrupted that series. Volunteers for that program worked hard, and in some cases (especially the Northern tier) traveled distances to "spread the word." The individuals who caused the GCW to happen are recognized within this newsletter.

We cannot be too frequent in our recognition of those within our body who give extra of their time and energy for the betterment of our profession. As I have occasion for contact with each of these individuals, it makes me pleased and proud to be part of our association.



26th
Annual
Conference
THE HOTEL
HERSHEY

WHAT'S INSIDE:

SECTOR REPORTS

1994 PASFAA Conference Plans
1993-94 NASFAA Research
Hotline 94 (1621 Calls)
1993 Guidance Counselor
Workshop Report
Training Needs Survey
Directory Updates
Increasing Your Success Rate

1993-94 PASFAA EXECUTIVE COUNCIL

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Editor Excerpts

1. NEWSLETTER EDITORIAL BOARD FOR 93-94

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Mary Frances Waite
Sally Whiteman
Ragan Watson
Rich Esposito
Joan Holleran
Randy Rennell

2. PUBLICATION SCHEDULE

Articles, position openings, or newsworthy items can be submitted to any of the Board members according to the following publication schedule:

Summer 94 issue:	articles due June 1
Fall 94 issue:	articles due August 15
Winter 94 issue:	articles due December 1
Spring 95 issue:	articles due February 15

3. IMPORTANT MESSAGE

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

Pasfaa Potpourri

1. MOVING OR CHANGING POSITION? PASFAA membership belongs to the individual and not your institution. All changes in name, address, or title should be submitted to Georgia Prell, Financial Aid Office, East Stroudsburg University, East Stroudsburg, PA 18301. This is where our membership list is maintained.

2. 1993-94 PASFAA COMMITTEES

Government Relations Linda D. Brittain
Membership and Elections Betty L. Davis
Professional Standards and Training Christine Zuzack
Public and Professional Information Bonnie L. Behm
1994 Conference Clarke Paine
1994 Hotline Ron Dawson

3. MEMBERSHIP IN PASFAA

Subscription to the PASFAA Newsletter is included in your yearly membership fee. Contact Betty Davis CCAC-South Campus for information about 1993-94 PASFAA membership.

4. LETTERS TO THE EDITOR

Do you have an opinion to share? Do you have a question to ask? Do you want to vent your frustrations? Do you wish to send a message to the readership? Do you wish to share an anecdote? If you have answered yes to any of the questions above, then you will be happy to know we are beginning a new column in the Newsletter to specifically address those types of issues, thoughts, and feelings.

Please send your letters to: Joyce M. Ballaban, Editor
PASFAA Newsletter
Albright College
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Reading, PA 19612-5234
FAX: (610) 921-7530

All letters must be signed and we reserve the right to condense or edit if necessary.

PUBLIC TWO-YEAR SECTOR REPORT

*submitted by: Fran McKeown
Bucks County CC*

The public two-year sector met at the Harrisburg Hilton on November 4 and 5. Both Rick Irvin and Janet Weiss attended our meeting to update us on the new common loan application process as well as the status of the technical amendments regarding reauthorization. Many other topics of interest to the members were discussed including pro-rata refunds and the pro-ration of Federal Pell Grants. We had an in-depth discussion on how different institutions attempt to perform

outreach with their students to inform them about the financial aid process. Generally, the feeling is that as financial aid officers, we get so overwhelmed with complying with federal regulations that the counseling aspect of the job gets overlooked. There were many good suggestions on how to be proactive in this respect. The spring meeting of the public two-year sector will be held April 21 and 22 at the Harrisburg Hilton.

PRIVATE FOUR-YEAR SECTOR REPORT

*submitted by: Cate McIntyre
Allentown College*

The four-year private sector met at Dickinson College in Carlisle, Pennsylvania on December 13, 1993. The meeting was well attended by sector members.

The morning program consisted of updates from PHEAA personnel, Vince Racculia, Mary Beth Kelly and Rick Irvin. The group also heard from Dr. Jane Stockdale, Commonwealth of Pennsylvania Department of Education, on the SPRE regulations set forth in the Reauthorization of the Title IV Higher Education Amendments. SPRE relates to the state program review entity that will be responsible for conducting program reviews for recommended institutions.

After a wonderful lunch provided by our host, the afternoon session was led by a panel consisting of Bill Burke, Wendy McLaughlin and Ruth Cramer. The panel discussion went

very well, with all attendees participating in the lively discussion on some "hot" topics. Some of the topics discussed were: enticement awards, May 1 Candidates Reply Date, merit aid vs. need-based aid, need-blind admission, tuition discounting, preferential packaging to name but a few topics debated with vigor.

A special thanks goes out to the PHEAA staff and Dr. Jane Stockdale for bringing their expertise to our meeting. Many thanks to Don Raley and his staff for graciously hosting our meeting and providing us with excellent facilities and delicious refreshments. I would also like to thank all sector members who attended and participated in the meeting and would encourage them to communicate their comments and suggestions for future meetings.

NURSING SECTOR REPORT

*submitted by: Patty Zink
Washington Hospital
School of Nursing*

The Southwestern Pennsylvania Nursing Sector Association met on November 3, 1993.

Jan Poluha, Ohio Valley Hospital School of Nursing, was elected Vice President and will assume responsibilities of President in June, 1994 when Ginny Kopko, Sewickley Valley Hospital School of Nursing, steps down. Adrienne Miller, Shadyside Hospital School of Nursing, was elected Secretary to replace Patty Zink, Washington Hospital School of Nursing.

Discussion was held on state grant certifications, specifically the 25% reduction in educational costs and whether uni-

forms are included in this calculation. PHEAA will be contacted for clarification.

Discussion was also held on the following issues: loan regulation which became effective 2/93 regarding student loan proceeds, conversion of clock hour/credit hours and whether nursing schools are exempt from this new regulation (we have been informed we are NOT exempt), direct lending, and completion/graduation rates.

It was very informative day!

Our next meeting is scheduled for February 22, 1994 at the Sheraton Inn, Warrendale.

1994 PASFAA THE HOTEL

OCTOBER

The 1994 conference committee has had one planning meeting to date. In conjunction with the PASFAA council meeting we met December 5 and 6, 1993 at the Hotel Hershey.

Hotel Description

"The Only Grand Hotel in the Heart of Pennsylvania"

A member of the prestigious Historic Hotels of America Registry, this legendary year-round resort is styled after the famous 19th century grand hotels of the Mediterranean. Old World elegance accompanied by all the modern conveniences you need for a meeting of today.

Hotel Rate

Double \$ 115/nite* plus 6% PA Sales Tax and service charge

Single \$ 170/nite* plus 6% PA Sales Tax and service charge

*Full American Plan - rates include overnight accommodations, three meals daily beginning with dinner on the day of arrival, concluding with luncheon on day of departure. Parking is free!

Committee Members

M. Clarke Paine

Michael Bertonaschi

Todd Frankford

Vali Heist

Christine Koterba

Karen Pryer

Fran Stefany

Elizabethtown College, CG 02266

LaRoche College, CG 01535

PNC Education Loan Center, 717-232-9423

Alvernia College, CG 00007

Widener University School of Law, CG 02014

Harrisburg Area Community College, CG 01140

St. Joseph Hosp. Sch. of Nursing, 717-291-6044

CONFERENCE

HERSHEY

*submitted by: M. Clark Paine
94 Conference Chair*

23-26, 1994

If you have ideas, thoughts and/or recommendations to share with the committee, please contact one of us or complete the following form and mail it to M. Clarke Paine, Financial Aid Office, Elizabethtown College, Elizabethtown, PA 17022.

PROGRAM SESSION RECOMMENDATION

Title of Program: _____

Content of Session: _____

Recommended Presenter(s): (feel free to recommend yourself) _____

Name(s) _____

Institution _____

City/State _____

Phone _____

Name(s) _____

Institution _____

City/State _____

Phone _____

KEYNOTE SPEAKER RECOMMENDATION

Name _____ Title _____

Organization _____

Address _____

Phone _____

Please use an attached sheet to share any additional ideas you might have toward the making of a productive PASFAA Conference for 1994.

Signed _____ Institution _____

City/State _____

Phone _____

1993-94 NASFAA Research Committee Report

submitted by: *Deborrah Glen-Long*
Yale University

With changes from Reauthorization, new regulations and an overwhelming number of aid applications to be reviewed, who has time for research? A survey or simulation analysis or full-scale research project may not be at the top of your priority list right now, but there's no doubt that some of the information out there could be useful in your daily work and it may even make your job a little bit easier.

For example, did you know that the NASFAA Research Committee and KPMG-Peat Marwick have been working on the development of a staffing model for financial aid offices? Preliminary information about current staffing levels has been made available at some state and regional meetings this fall and a summary of current salary levels was published in November 8, 1993 *NASFAA Newsletter*. The final phase of this project is being worked on now and it is expected that a full report will be available in late spring or early summer. This particular project is different from anything that has been done before because it will offer suggested staffing compositions based on a comprehensive set of criteria, including level of automation, type of institution, number of aid recipients, functions performed in the aid office, amount of financial aid delivered, etc.

If a national project does not translate well to your own situation or you have questions about topics other than staffing, you may be interested in a Research Manual that is being developed by NASFAA. The first few chapters will provide basic information for the research novice and then become progressively more complex for the research whiz. It is designed to be a "how to" handbook for doing research and, just as importantly, interpreting and using the results of either your own or others' projects. Jerry Davis from PHEAA is serving as the editor and is being assisted by several professionals, including practicing aid administrators, who have "willingly and enthusiastically" donated time to write chapters. A complementary piece to the Research Manual is the Bibliography that was assimilated by the 1992-93 NASFAA Research Committee and is available on diskette upon request.

Believe it or not, there are some people in this world who devote most or all of their time to financial aid research. The National Postsecondary Student Aid Study (NPSAS) is a national database that contains information about students and their family finances, types and amount of aid received and cost of attendance. For the past several years, NASFAA has encouraged use of this database by way of the Sponsored Research Grant Program. All researchers sponsored by the Grant Program, whether or not they use NPSAS, are asked to consider publishing their results in the *Journal of Student Financial Aid*. Aid administrators are encouraged to apply for grants and may do so by submitting the materials requested in the Call Proposals, which is published every fall in the *NASFAA Newsletter*.

That brings us to the point about the importance not only of conducting research to do our jobs more effectively and to distribute our limited resources more equitably, but of communicating the results so that our friends and colleagues can benefit from our findings. You have probably seen summaries of the surveys conducted by the Rapid Survey Network (RSN) published in the *NASFAA Newsletter* and on PEN. These can be particularly helpful in serving as a barometer of our members' concerns, such as the one on need analysis methodology recently conducted by the NASFAA Need Analysis Standards Committee. Other RSN surveys are conducted due to the timeliness of an issue, which was the case in 1992-93 with Direct Lending.

Whether your interest is at the institutional, state, regional or national level, we hope you will take the time to share your research with others. The NASFAA Research Committee is currently compiling a list of projects undertaken in 1993-94 for publication in the *NASFAA Newsletter* to encourage networking within the financial aid community. If you or someone you know is working on some research or recently completed a project, please submit the title (or one line description), names of the researchers and completion date to: Deborrah Glenn-Long, Assistant Director, Yale University, Undergraduate Financial Aid, P.O. Box 208288, New Haven, CT 06520-8288.

94 PASFAA HOTLINE

submitted by: Ron Dawson

94 Hotline Coordinator

Perhaps it would be more appropriate to refer to 1994's version of the Financial Aid Hotline as the "Coldline"!! Either Mother Nature would have preferred a different week or was expressing in dramatic fashion an opinion on aspects of the 94-95 delivery system. Due to inclement (now there's an understatement) weather, the Hotline was cancelled on 3 nights in Harrisburg and 2 nights in Philadelphia. Hats off to Pittsburgh for having all 5!

The next issue of the Newsletter will contain a complete breakdown of the number and type of calls. Briefly, this year's total was 1,621. Pittsburgh handled 964 calls, Harrisburg 372 and Philadelphia 285. Excluding the factor of weather-related problems and concerns, it appears that the number of calls was consistent with recent years.

Thank you to all those who volunteered to help with the Hotline. Without your help, many students, parents and grandparents would still be wondering where to mail something, how to apply for a loan, how to answer a particular question etc. Thanks to your efforts at least those families have a clearer picture of what to do.

Since this type of an effort cannot be done without the assistance of many individuals, PASFAA would like to extend special thanks to Arlene Hassinger of PHEAA, and Laurie Sapp, Lanella Hooper and Sally Whiteman of PNC. Without the financial and personnel support of PHEAA and PNC, the Hotline would not be possible.

Thanks also goes out to the site coordinators: Wendy Dunlap of Point Park, Carolyn Wharton of Elizabethtown and MaryKay McCaughan of Villanova. Their work really makes the actual week run smoothly.

Once again, thanks to all who volunteered their time, talent and energy. Any event with the scope of the Hotline only happens as a result of many people reaching out to help.

FINDING SCHOOLS FROM OE CODES

Institutions with PHEAA terminals can find the institutions belonging to specific OE codes by typing XLC/OE CODE/OE. For example XLC/003322/OE would be Kutztown University.

ENGAGEMENTS:

Leona Frech, Student Aid Counselor at University of Pittsburgh, Johnstown, recently became engaged to Daniel Yunnetz. They are planning an August 1994 wedding! CONGRATULATIONS LEONA!!!!

BIRTHS:

Mary Frances Waite, Financial Aid Director at Ursinus College, is a new MOM! Emma Claire, born January 25th, weighed in at 7lb. 10 oz. and is 20 1/2 inches long. CONGRATULATIONS MARY FRANCES AND JOEL!

MESSAGE FROM NORA

I am sure that many of you have heard that Rich Esposito has accepted a financial aid position at Duquesne University. The proprietary sectors loss is the private sectors gain. I have been approved by PASFAA council to take Rich's place as proprietary sector representative until a special election take place. I am encouraging proprietary sector members to contact me with any issues or concerns that they may have. The next PASFAA council meeting is scheduled for April 11, 1994. I can be reached by PHEAA Terminal (CG00656), phone (610) 352-1776 or fax (610) 352-1834.

GET WELL WISHES

On February 3, Kutztown University's Director of Financial Aid, Anita Faust, was involved in a one-car crash on her way home from work. After surgery to repair a seriously broken ankle, Anita is now recuperating at home. PASFAA colleagues who wish to extend get well greetings may send cards to Anita at her home address : 2611 Eagle Road, West Chester, PA 19382-6320. PASFAA wishes Anita a speedy recovery!

1993 Guidance Workshop

The 1993 Guidance Counselor Workshop Series was conducted at 38 sites throughout Pennsylvania from November 2 to December 3. The GCW Series is a PAATP activity through the joint efforts of PHEAA and PASFAA. The workshops attracted 1128 participants from the ranks of high school guidance counselors, OVR counselors and other social service personnel. The PHEAA Regional Directors along with thirty-seven PASFAA presenters and twenty PASFAA registrars presented half-day programs which informed participants about the 1994-95 delivery system, program updates and other much-needed information.

Not to be forgotten in the process are last year's Professional Standards and Training Committee who took responsibility for PASFAA syllabus development, transparency production, hand-out reproduction and other important tasks. That dedicated committee consisted of the 1992-93 sector representatives (JoAnn Bonfatto, Joanne Parke-Davison, Bob Heyl, Margaret Hynosky, Georgia Prell, Patricia Serianni and Don Shade.)

This year it is appropriate to acknowledge the other PASFAA volunteers. PASFAA program presenters and site registrars at the various workshops were:

NORTHWEST (Sharon R.O.)

Nov. 2 - U-Pitt Bradford
Nov. 2 - Clearfield H.S.
Nov. 9 - Warren Co. Vo-Tech
Nov. 10 - Gannon Univ.
Nov. 12 - Midwestern IU4
Nov. 16 - Crawford Co. Vo. Tech
Nov. 18 - Riverview IU

Presenter

Ragan Watson (Clarion)
Kelly Snyder (Penn State)
Barbara Wood (Mercyhurst)
Jim Treiber (Gannon)
Ken Grugel (Clarion)
Cindy Farrell (Thiel)
George Gerhart (PSU- Shenango/Beaver)

Registrar

Tammie Hannon (UPB)

SOUTHWEST (Pittsburgh R.O.)

Nov. 1 - CC of Beaver Co.
Nov. 2 - Laurel Highlands H.S.
Nov. 3 - W & J College
Nov. 8 - U. Pitt - Gbg.
Nov. 10 - Somerset Area Vo. Tech
Nov. 15 - U. Pitt - Jtown
Nov. 16 - Arian Int. U.
Nov. 17 - Hollidaysburg H.S.

Bob Latta (Westminster)
Deidre Smith (Point Park)
Karen Pratz (Waynesburg)
Pat Loughran (St. Francis)
Leanne Frech (UPJ)
Julie Salem (UPJ)
Christine Zuzack (IUP)
Randy Rennell (Juniata)

Pattie Hladio (Chatham)

Brandi Darr (Triangle)

Sally Abrams (IUP)
Joanne Park-Davison
(Altoona Hospital)
Lauren Chorney
(Lenape Sch. PN)

Nov. 19 - CCAC (North)

Sharon Platt (CCAC-North)

NORTH CENTRAL (Wmspt. R.O.)

Nov. 4 - Susquehanna U.
Nov. 5 - Wmspt. Sch. of Comm.
Nov. 9 - Bloomsburg U.

Helen Nunn (Susquehanna)
Karen Bloom (Lycoming)
Tom Lyons (Bloomsburg)

Suzanne Sparrow
(Ursinus)

DIRECTORY UPDATE

"The best laid plans of mice . . ." came apart with the weather. So, if you anticipated the PASFAA Directory in January and you didn't see it, you know that it's not floating around in your mail, it's still at the printer! With the closing of our printing facilities, the Directory sat, along with many other materials, until we reopened. It is scheduled to be mailed to members in late February . . . or earlier, if our plans are on schedule this time. In the meantime, please include the following members with your Directory. When you do receive your Directory, review your information to make sure That the listing is correct. For changes or corrections to the Directory, please contact me by phone (412) 469-6241 or fax (412) 469-6371 or by terminal CG00525.

ADDITIONS

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CORRECTIONS / CHANGES;

RICH ESPOSITO - Moved to : Duquesne University
600 Forbes Avenue
Pittsburgh, PA 15282-0299
(412) 434-6607

JOYCE CALAMIA - Change of Address: Abington Memorial Hospital
2500 Maryland Rd., Suite 200
Willow Grove, PA 19090-1284

Many of you have already received your PASFAA Directory. For those who have not received it as yet, it's on its way to you? Weather conditions have prevented an earlier mailing, but it's finally done. However . . . the beautiful cover has an error on it . . . the directory indicates its the "1994-1995" directory, when in fact, it's the "1993-1994" directory! I must have had some crazy day when that was done . . . maybe I'm just anxious for the year to end. Please make a large note of this on your covers or if you're like me, just leave it untouched?

Thanks for your understanding Betty Davis

Counselor Series

*submitted by: Ron Shunk
President*

	Presenter	Registrar
Nov. 12 - Mansfield U.	Chris Vaughn (Mansfield)	
Nov. 16 - Towanda H.S.	Chris Vaughn (Mansfield)	
Nov. 19 - South Hills B.S. State College	JoAnn Bonfatto (South Hills)	Roberta Hardin (PSU)
SOUTH CENTRAL (Carlisle R.O.)		
Nov. 1 - Gettysburg College	Ruth Cramer (Wilson)	Ron Shunk/Zack Kelly (Gettysburg College)
Nov. 5 - Susquehanna H.S.	Gordon Bateman (Elizabethtown)	Lynell Shore (Lebanon Valley)
Nov. 8 - Penn State - York	Suzanne Schlager (F&M)	Carolyn Wharton (Elizabethtown)
Nov. 12 - East Juniata H. S.	Ray Randall (Bucknell)	
Nov. 22 - Millersville U.	Richard Frerichs (Millersville)	
NORTHEAST (Wilkes-Barre R.O.)		
Nov. 8 - W'minster Theo. Sem.	Bonnie Behm (TJU)	
Nov. 10 - Bucks Co. Com. Col.	Donna Wilkoski (BCCC)	
Nov. 17 - Lehigh Co. Com. Col.	Cate McIntyre (Allentown C.)	Phyllis York (LCCC)
Nov. 18 - Easton IU20	Georgia Prell (East Stroud.)	Susan Longyhore (ESU)
Nov. 19 - Berks Co. IU14	Joyce Ballaban (Albright)	Joan Willertz (PSU - Allentown)
Nov. 22 - Wilkes Barre AVT	Barbara Schmitt (Keystone JC)	
Nov. 23 - Marywood Coll.	Margaret Hynosky (Scranton)	Patrick Fanning (Lak. JC)
Dec. 3 - S. Schuylkill Vo.	Judy Rile (Albright)	Joan Holleran (Kutztown)
SOUTHEAST (Philadelphia R.O.)		
Nov. 18 - Chester Co. IU24	Beverly Yager (Immaculata)	M.F. Waite (Ursinus)
Nov. 23 - Delaware Co. IU25	MaryKay McCaughan (Villanova)	Cheryl Browning (Berean)
Nov. 30 - LaSalle Univ.	Wendy McLaughlin (LaSalle)	Tricin Gray (Court Rept. Inst.)

* R.O.= Regional Office

TRAINING NEEDS SURVEY

submitted by: Barbara Schmidt
Keystone Jr. College

PASFAA and PAATP are interested in knowing your training needs. The survey will take only a few minutes of your time, but will help in the program planning process. Please return the survey to Chris Zuzack, Financial Aid Office, Indiana University of Pennsylvania, 308 Pratt Hall, Indiana, PA 15705-1093.

PLEASE COPY AND DISTRIBUTE THIS SURVEY TO ALL FINANCIAL AID PERSONNEL IN YOUR OFFICE, EVEN IF THEY ARE NOT A MEMBER OF PASFAA.

1. Are you a member of PASFAA?
 YES NO
2. What is your current position?
 A. Director/Administrator
 B. Counselor
 C. Support Staff
 D. Other
3. How many years have you worked in a student aid office?
 A. Less than 1 year
 B. 1 to 3 years
 C. 3 to 5 years
 D. 5 to 8 years
 E. 8 to 10 years
 F. More than 10 years
4. What factors would prohibit you from attending training?
 A. Cost D. Office Coverage
 B. Location E. Other
 C. Time
5. Please indicate the most time you would be willing to spend at a workshop?
 A. 1/2 day C. 1 & 1/2 to 2 days
 B. 1 full day D. more than 2 days
6. What is the maximum distance you are willing to travel to attend a workshop?
 A. 1 to 20 miles C. 45 to 60
 B. 20 to 45 miles D. More than 60
7. What is the best time of year for you to attend a workshop?
 A. Fall C. Spring
 B. Winter D. Summer
8. Please rate each of the following areas as to level of training need:
 1 = Very helpful 2 = Somewhat helpful 3 = Not helpful
 A. Supervising professional, clerical or student staff members
 B. Application process
 C. Packaging and Awarding
 D. Communicating w/ students and families
 E. Auditing and Program Reviews
 F. Understanding and implementing regulations
 G. Professional issues (Please specify) _____
 H. Federal campus-based aid program reg.
 I. Federal Pell Grant program reg.
 J. Fed. Family Education Loan Program reg.
 K. PHEAA Grant program reg.
 L. Direct Lending
 M. Ethical and Legal Issues
 N. Stress Management & Positive Work Environment
 O. Pro-rata refunds
 P. Professional Judgement
 Q. Verification process
 R. Understanding the 1040's
 S. Outreach programs/Counseling Tech.
 T. How to set-up a Fin. Aid Office
 U. Info session on other sponsoring agencies such as; JTPA, SPOC, New Choices, OVR and their relationship to packaging
 V. Communicating w/ campus departments
 W. Calculations for credit hour/clock hour conversions
 X. Exploring career alternatives for Fin. Aid Administrators
 Y. Your ideas? (Please) _____

 Would you be willing to be a trainer or could you recommend someone whom you feel would be a good instructor?

- Yes. Name: _____
 No
 I Recommend: _____

Increasing Your Success Rate

John G. Bannister
Director of Financial Aid
University of South Carolina

Introduction

Student Financial Aid is one of the most important services on any college campus. Student aid programs range from tens of thousands of dollars at small institutions to tens of millions of dollars at large institutions. Regardless of program size, the effective management of the student aid office is essential to the recruitment, admission and retention of students. Therefore, it is important that the aid administrator be knowledgeable about more than student aid. The aid officer must be alert to trends and problems in higher education as a whole and at his/her institution in particular. The aid administrator must develop skills in institutional finance, in academic know-how and in public relations.

The primary context of this paper will address the importance of the aid administrator as an effective communicator and public relations specialist. Most of the problems we encounter whether with students, parents, other administrators, or even our boss, are often the result of a misunderstanding. Since our success often depends on how well we communicate with our superiors, it is important for aid administrators to develop good public relations skills and know-how. This publication will provide guidelines and suggest techniques to assist in communicating with the boss, meeting the supervisor's expectations, and establishing campus credibility with all the aid administrator's constituencies.

What Our Superiors Want From Us

The financial aid director is a campus leader. Respect is earned, it is not bestowed by title of office. In all his/her actions, the financial aid administrator should conduct himself as an educator and a professional. This course will lead

to acceptance and believability. An effective aid administrator has been defined by one college president as someone who:

- Keeps top level administration informed
- Develops an awareness of the college community
- Is a valuable member of the college community
- Engages in meaningful research projects to support financial aid programs
- Writes effective memos
- Has a viable and active financial aid committee
- Stresses the importance of academic performance for financial aid recipients
- Establishes goals and objectives (and communicates them)
- Incorporates federal and state financial aid guidelines into overall institutional guidelines
- Takes "shortcuts" where possible
- Has good (up-to-date) brochures/publications
- Utilizes students to disseminate information
- Works actively with other components of the institution
- Has an active staff development program
- Is up-to-date in computer technology
- Sees himself/herself as an educator.

These suggestions alone are a prescription for being successful. However, there is much more that the effective administrator can do. Let us examine some other techniques.

Communicating With Your Boss

Writing in the *Wall Street Journal* (8/1/86), Peter Drucker notes that few managers seem to realize how important it is to "manage" the boss or worse yet, believe that it can be done at all. Drucker comments further that it is both the subordinate's duty and in the subordinate's self-interest to make the boss as effective and achieving as possible.

Depending on the size of the institution and the organizational structure, financial aid administrators report to persons with a wide range of titles. Regardless of what the boss's title may be, President, Vice President, Dean or something else, your boss will be keenly interested in the following:

- Funding trends
- Default rates and audit exceptions
- News media events involving your office
- Statistical facts about your office operations
- Things your boss can brag about
- Political contacts
- Conflicts of interest
- Continuing personnel problems
- Student problems with institutional implications
- Information about your staff
- Problems you need help in resolving
- Things your boss should not talk about
- Any departure from the norm.

In as much as possible, minimize the problems in your office to the boss. If you must involve your boss in problem resolution, suggest alternative solutions and the consequences of each alternative. Establish your reputation as one who can make a

decision and resolve problems. Alert your boss if you know a problem from your office is headed his/her way. Try to resolve student problems without them ever reaching your boss. Never let your boss be surprised by something about which he/she should have been forewarned by you. Be sensitive to your boss's management style. Learn how and when it is best to approach your boss. By approaching him/her at the right time, you will significantly increase your successes with your boss.

At least once a year, go to your boss and ask: "What do I do and what does my staff do that helps you do your job? And what do we do that hampers you and makes your job difficult?" Report your mistakes. You don't get in trouble for making mistakes; the trouble comes when you try to cover them up. Exercise your responsibility. Seize the initiative; express your opinion. If a matter is one of opinion, your opinion should prevail. However, you should preface your opinion with a comment such as "this is my recommendation but here are some other alternatives you may wish to consider." And finally, if there is ever any doubt whether you should tell your boss something, tell him/her.

Establishing Campus Credibility

Regardless of whether the financial aid office is held in high esteem or if the image needs improving, there are numerous techniques which can be employed that will return valuable dividends of credibility, positive relationships, broader visibility, and greater institutional support and respect. Some important actions an aid administrator who is on top of his/her public relations program can take are:

- Anticipate things; provide information before questions are asked.
- Get to know as many people on campus as possible; get involved at the institutional level; get appointed to a committee; teach a class; volunteer your services at every opportunity.
- Be honest in all your relationships.
- Establish a reputation as one who is informed, thorough, accurate and dependable.
- Don't tell anecdotal stories which reflect unfavorably upon students and your profession.
- Be quick to respond to cynical and demeaning comments about students' abuse of financial aid with success stories and statistical data illustrating the effectiveness of financial aid.
- Always do your homework and have the facts to support your position.
- Invite and welcome suggestions; admit your mistakes and be willing to change if it can be demonstrated that there is a better way.
- Produce and distribute a good annual report stressing the impact of financial aid on your campus and the positive accomplishments of your department.
- Utilize a financial aid advisory committee; provide the committee good information and seek their approval of major policy recommendations.

Summary

- Seek student input; conduct user perception studies and utilize student advisory groups.
- Keep top-level administrators informed about major developments, trends and important happenings in the financial aid office.
- When you read an article or news item you want your boss or other institutional administrator to see, send a copy to that person's attention.
- When someone on campus requests that you do something for a student, do it, unless it is a violation of regulations or your professional ethics; be sure to follow up with a telephone call to let that person know what you have done.
- be proactive, not reactive; stay off the defensive; maintain a positive attitude.

There is much misinformation about student aid programs and financial aid recipients. Many stories are repeated which undermine the positive aspects of financial aid. The public tends to hear all the horror tales about financial aid abuse and misuse. As the individuals on campus who know about the many positive attributes of financial aid, it is our professional responsibility to make sure that others have a similar appreciation.

At the heart of effective financial aid program administration is the need for a well-defined managerial philosophy. Financial aid administrators, no less than key institutional officers, need a rather high degree of philosophical consciousness in order to deal effectively with numerous constituencies that have different and often conflicting expectations of him/her. The ability to defend one's position as well as to learn from one's critics requires a principled starting point. Sometimes the most difficult and often the most embarrassing questions that administrators encounter are why a particular decision was made or why a particular policy was adopted.

Knowing what one is trying to do is a prerequisite for knowing whether one is doing it successfully. A well-conceived and seasoned rationale serves as a vital ingredient for effective management. There is a great need for the financial aid officer to develop a philosophical and theoretical underpinning...a way for him/her to put into perspective and to conceptualize problems, organizational objectives and alternate operational styles.

Once one's philosophy has been defined, it is then fairly easy to determine goals and to set objectives for the aid office. The first and primary function of any manager is to ensure that the goals of his/her organization are clearly stated and understood. A written plan, showing what is to be accomplished, by whom, and when, should be followed using a set of written policies and procedures by which the plan is to be carried out. If the aid administrator's role is to be successfully fulfilled, he must have a well-defined and clearly articulated managerial philosophy.

Increasing Your Success Rate Prepared by John G. Bannister

July 1988

This publication has been prepared at the request of President Vernetta Fairley as one of the special projects identified by her to be accomplished during her tenure as SASFAA's twenty-fifth president. Rather than focusing on a single major project, Vernetta set a goal of several service projects for the benefit of SASFAA's members. President Fairley's charge to this author was to develop a guide to assist aid administrators in improving public relations with all their constituencies but with special emphasis on improving communication with the aid administrator's immediate superior. To this end, I have drawn upon those experiences and techniques which have been successful for me during a quarter century as an educational administrator.

J.G.B.

References

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- Bogue, E.G. and Saunders, R.L. *The Educational Manager: Artist and Practitioner*. Worthington, Ohio Charles A. Jones Publishing Co., 1976.
- Drucker, P.F. How to Manage the Boss. *Wall Street Journal* 8/1/86.
- Ferguson, J.L. College Presidents and Financial Aid Officers. *The College Board Review*, Fall 1981.

CHANGE IN SECTOR REPRESENTATIVE

submitted by: *Ron Shunk*
President

The representative for the proprietary sector has changed since the election at the 1993 Conference. Rich Esposito has relinquished his duties as representative to that sector because he has taken a new position at Duquesne University, and he is, therefore, no longer eligible to continue. Nora McFadden Downey from Gordon Phillips Beauty School in Philadelphia was elected as the interim representative until the next conference.

This is a good opportunity to review the procedure in this regard. The PASFAA Constitution and By Laws indicate that

during the first year of a representative's term a replacement should be elected by Executive Council to serve until the next conference at which time a special election should be held. That being the case, Nora will serve until October, and she and any other proprietary sector members are eligible to seek a spot on the ballot for a one-year term. The subsequent year there will be a regular election for the full two-year term.

Best wishes to Rich in his new position, and to Nora who has already been busy with her new duties.

POSITION OPENING

Assistant Director of Financial Aid

Indiana University of Pennsylvania, the largest of the state-owned universities in the Pennsylvania State System of Higher Education, anticipates an opening in the Financial Aid Office for an Assistant Director. IUP, located 60 miles northeast of Pittsburgh, enrolls approximately 14,000 students in both undergraduate and graduate degree programs.

A Master's degree and at least one year of experience in financial aid is preferred. Knowledge of automated processes is highly desirable. Excellent communication and interpersonal skills are essential.

The anticipated starting date for this position is late spring or early summer. Interested parties should direct inquires to: Frederick A. Joseph, Director of Financial Aid, 308 Pratt Hall, Indiana University of Pennsylvania, Indiana, PA 15705, (412) 357-2218

IUP is an Affirmative Action/Equal Opportunity Employer

LOAN FORGIVENESS PROGRAMS

The Legislature enacted a new loan forgiveness program for graduates of Early Childhood Education Associate and Bachelor Degree programs. Pennsylvania residents with loans guaranteed through PHEAA who are working full-time at Department of Welfare approved facilities and earning less than \$18,500 may be eligible for loan cancellation. PHEAA will be sending out additional information within

the next few weeks. Funds are limited so borrowers must apply by a specific deadline and may be subject to a lottery.

The Agricultural Education loan forgiveness program was extended until 1997 for PA grads from an agricultural program or veterinary medicine who are working on family farms or with large animals.

LEGISLATIVE NETWORK

submitted by: *Wendy Barron*
Villanova School of Law

On the following page you will find my attempt to place each of your institutions in its appropriate Congressional District, using a 1985 list of institutions where every school is simply a dot on the map and attempting to match that dot to the appropriate district on a congressional map. I have listed the District, the Representative, his DC phone number and his building and room no. I would be most appreciative if you would check this list for accuracy and get back to me [(CG00196) or (610) 519-7015] with any additions or corrections. If your school is not listed please find out your district and then let me know. I would appreciate it also if you would notify me if any of these schools are no longer in existence. Schools in large cities, especially Pittsburgh and Philly may be particularly vulnerable to error because the maps are not very detailed. Thanks so much for any help you can give me.

Please find list of Congressional Districts on page 15.

District I

Thomas Foglietta - 202-225-4731; CHOB-341
Curtis Institute of Music, Hussian School of
Art LaSalle University, Moore College of
Art, Phila. College of Pharmacy and Science,
Pierce Junior College,
Temple University, University of
Pennsylvania Widener University, Univ. of
the Arts, Drexel Univ.

District II

Lucien Blackwell - 202-225-4001; CHOB-410
Art Institute of Phila., Berean Institute,
Combs College of Music, Community
College of Phila., Hahnemann, Medical
College of Phila., Pa. College of Aptometry,
Phila. College of Textiles and Science, Phila.
College of Osteopathic Medicine, St. Joseph's
University, Thomas Jefferson University, The
Phila. Institute.

District III

Robert A. Borski - 202-225-8251; RHOB -2161
Gratz College, Holy Family College

District IV

Ron Klink - 202-225-2565; LHOB - 1130
Comm. Coll. of Beaver County, Geneva
College, Lyon School of Business, New
Castle School of Trades

District V

William Clinger - 202-225-5121; RHOB 2160
Bucknell University, Clarion University of
PA, Lock Haven U. of PA, Mansfield Univ.
of PA, Penn State University, Pitt-Bradford,
South Hills Business School.

District VI

Tim Holden - 202-225-5546; LHOB 1421
Albright College, Alvernia College, PACE
Inst., Kutztown U. of PA, McCann School of
Business, Reading Area Community College,
Penn State-Berks, Randy Rick Beauty
Academy, Advanced Career Training.

District VII

Curt Weldon - 202-225-2011; RHOB - 2452
American College, Cabrini College, Cheyney
University of PA, Delaware County
Community College, Eastern College,
Haverford College, Immaculata College,
Neuman College, Swarthmore
College, Valley Forge Military Academy,
Villanova University, Valley Forge Christian
College, PA Institute of Technology, Gordon
Phillips Beauty School, Advanced Career
Training-Upper Darby.

District VIII

Jim Greenwood - 202-225-4276; CHOB - 515
Bucks County C.C., Delaware Valley Coll.
of Science and Agriculture

District IX

Bud Shuster - 202-225-2431; RHOB - 2188
Altoona School of Commerce, DuBois
Business School of Trades, Juniata
College Penn State - Mont Alto Campus,
Altoona Campus, DuBois Campus,
Susquehanna University, Triangle Institute
of Tech. - DuBois, Wilson College, Altoona
Hosp. Sch. of Nursing.

District X

Joseph McDade - 202-225-3731; RHOB - 2370
Baptist Bible College, Johnson Technical
Institute, Keystone Junior College,
Lackawanna Junior College, Lycoming
College, Marywood College, Northeast
Institute, Penn State Worthington-Scranton
Campus, U. of Scranton, Williamsport School
of Business, PA College of Technology.

District XI

Paul E. Kanjorski - 202-225-6511; RHOB - 2429
Bloomsburg Univ. of PA, College of
Misericordia, East Stroudsburg Univ. of PA,
Kings College, Luzerne Community College,
Penn State- Haxelton and Wilkes Barre,
Wilkes College, Geisinger School of -
Nursing, Radiology, Histotechnology, Nurse
Anesthesia, Dietetic.

District XII

John Murtha - 202-225-2065; RHOB - 2423
Cambria-Rowe Business College, Christ the
Savior Seminary, Indiana University of PA,
Mt. Aloysius College, National Education
Center - Vale Tech Campus, St. Vincent
College, St. Francis College, Triangle
Institute of Technology-Greensburg Center,
Univ. of Pitts. at Johnstown.

District XIII

Marjorie Margolies-Mezvinsky - 202-225-
6111; LHOB 1516
Academy of New Church, Beaver College,
Bryn Mawr College, Dropsie College,
Gwynedd-Mercy College, Harcum Junior
College, Manor Junior College, Manor Junior
College, Montgomery County Community
College, Rosemont College, Ursinus College,
Chestnut Hill, Antonelli Inst. of Art and
Photography.

District XIV

William Coyne - 202-225-2301; RHOB - 2455
Carlow College, Carnegie-Mellon Univ.,
Chatham College, C.C. of Allegheny County
- Allegheny Campus, Duff's Business
Institute, Duquesne University, Electronic
Inst. (Pitt), ICM School of Business,
Pittsburgh Technical Institute, Point Park
College, U. of Pittsburgh, PA Inst. of Culinary
Arts, Pittsburgh School of Aeronautics,
Bradford School, Connelly Technical Inst.

District XV

Paul McHale - 202-225-6411; CHOB - 511
Allentown College of St. Francis de Sales,
Cedar Crest College, Churchman Business
School, Lafayette College, Lehigh
University, Lehigh Carbon Community
College, Lincoln Technical Institute,
Moravian College, Muhlenberg College,
Northampton C. C., National Ed. Cnt.-
Allentown Business School, Penn State-
Allentown, Welder Training and Testing Inst..

District XVI

Robert S. Walker - 202-225-2411; RHOB - 2369
Franklin and Marshall, Lancaster Bible
College, Lancaster Theological Seminary,
Millersville Univ. of PA, Thaddeus Stevens
State School of Technology, West Chester
Univ. of PA, Lincoln Univ.

District XVII

George W. Gekas - 202-225-4315; RHOB - 2410
Elizabethtown College, Evangelical School
of Theology, Harrisburg Area Community
College, Lebanon Valley College, National
Ed. Cnt. - Thompson Campus

District XVIII

Rick Santorum - 202-225-2135; LHOB - 1222
LaRoche College, C.C. of Allegheny County-
South and Boyce.

District XIX

Bill Goodling - 202-225-4836; RHOB 2267
Dickinson College, Dickinson School of Law,
Gettysburg College, Lutheran Theological
Seminary Messiah College, Penn State-York,
Shippensburg Univ. of PA, York College of
PA, Yorktown Business Institute.

District XX

Austin J. Murphy - 202-225-4665; RHOB 2210
California Univ. of PA, Robert Morris
College, Seton Hill College, Washington
and Jefferson College, Waynesburg College,
West Moreland C.C., Pitt-Greensburg.

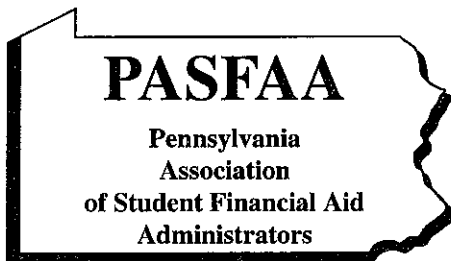
District XXI

Tom Ridge - 202-225-5406; LHOB - 1714
Allegheny College, Behend College of Penn
State Univ., Butler County Community
College, Computer Systems Institute -
Meadville, Edinboro Univ., Erie Business
Center, Gannon Univ., Grove City College,
Mercyhurst College, Penn State Univ.-
Shenango Valley, Shenango Valley School
of Business, Slippery Rock Univ., Thiel
College, Triangel Inst. of Tech. - Erie..

CHOB = Cannon House Office Building
LHOB = Longworth House Office Building
RHOB = Rayburn House Office Building



April, 1994	PAATP Delivery System Workshops (7 sites TBA)
	4/7 State College - Hermitage
	4/8 Nanticoke
	4/12 Philadelphia
	4/13 Carlisle
	4/14 King of Prussia
	4/15 Monroeville
May 22-25	EASFAA Conference, Atlantic City, NJ
June 13-17	PAATP New Aid Administrators Training, Carlisle
June 13-15	PAATP New Student Loan Officers Training, Carlisle
July 17-20	NASFAA, Conference, Louisville, KY



Albright College

**Financial Aid Office
Reading, PA 19612**