

## A Look Back at ISFAA's Winter 2004 Conference

*Conversation with ISFAA President Bob Zellers*

**Bob, tell us your thoughts about how the conference went overall...**

"I think the conference went very well. I really do. I'll be honest, I had my concerns heading into the conference about how it would go, for a couple reasons. First, it was so close in time to the MASFAA conference that had just taken place in Indianapolis. Second, because it was in Indianapolis. Some people can skip Sunday night, and still drive in Monday morning when the location is Indianapolis. We had a goal to keep the cost down, so people that couldn't afford to attend MASFAA might be able to attend ISFAA.

"I also have to give great credit to both the Program and Site chairs and committees. They all did a fabulous job. A strong program at a reasonable price will produce a good attendance. Again, thank you to the Program and Site teams for their hard work!"

**What are your thoughts about the location itself, and any possible return to the Crown Plaza and Historic Union Station?**

"My answer to that is different after the conference than what it would have

been before the gathering. I had some reservations (pun intended) in the weeks leading up to the actual event. I am happy to tell you that I think it was a great site! It is obviously a historic place, and the renovation and maintenance that must go into creating a location like that, is fascinating to see. I was a bit surprised, but in a very good way!

"I was informed of a few temperature problems and a question or two about signage, but I think all of those items were addressed quickly and handled. I also feel that the food was tremendous, and I will vouch



Zellers

personally for the Presidential suite! As far as a return by ISFAA, I have recommended that we go back as a group in 2007."

**Would you share with us your favorite moment at**

## Spring Conference will Celebrate 70th Anniversary

Gerald Lewis

The Spring Conference will offer relaxation, education, and the opportunity to exchange ideas with our peers.

The setting in Southern Indiana should be a welcoming venue for all of the ISFAA membership. In many ways I view these meetings as the spring training of our membership. It is hoped that the membership will attend, learn, enjoy, and experience renewed enthusiasm for our profession.

Mr. Judkins should inspire attendees with the importance of their contributions to the many people we impact. The tools for continuing those contributions will be provided by SSACI and the Department of Education.

See you in attendance, and bring your guidance for future sessions.

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**the conference, or a fond memory that stands out in your mind?**

"My favorite moments are the opportunities to interact with new members of ISFAA or members I haven't had the chance to get to know yet. I also truly enjoy the exchange of thoughts and ideas with other directors from across the state. These things are favorites at every conference, but there was one other thing that really stood out to me about this gathering. The pre-conference training by Jamie Malone and Lois Kelly was wonderful. I'm pleased that many people were able to attend and hear what Jamie and Lois had to say."

**Did you have a least favorite moment, or was there something that you wished had been done differently?**

"I was not thrilled with the attendance at the dinner, Sunday. There are a variety of reasons for the level of turnout. Those that were there, however, know what great food was served, and they had great entertainment and in-

formative speakers to enjoy. Enough about that.

"The one thing I would have changed would have been something I had an easy opportunity to do. I had thought we had a certain order to the events on Sunday night, but somehow I had switched the order in my head. My mistake was pointed out to me in time to make everything right, but my introduction of a guest was not nearly up to the standard I like to have for myself. Any confusion that occurred was my fault, and I thank those that helped me get back on schedule!"

**Share with us your thoughts about ISFAA as an organization as it approaches 70 years.**

"It is an outstanding organization. It's outstanding, because of the people. ISFAA has done great things for students. ISFAA will continue to do great things for students because the people in ISFAA are committed to doing good things for those students. For this reason, the longevity ISFAA has had does not surprise me at all. ISFAA will need help with this task over time."

(continued)



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LOOK BACK, from page 1

**Finally, do you have any comment about something I didn't ask or topic that's been on your mind?**

I would just like to wrap up by thanking all of the people involved in making the Winter conference a success. That thank you goes out to all of the committee chairs and members of their committees—and to everyone who did all of the little things behind the scenes, that made it so successful.

I would also like to thank all of our associate members for their monetary support and the great work they do on committees and in other ways to help ISFAA. I tried to personally thank each of them at the conference, but if I missed anyone, I apologize, and I want to thank them now.

"I hope to see everyone at the Spring conference in Clarksville so that together we can make it as great as the Winter conference!"

## The Department Announces Spring Series

Jamie Malone

The Department has announced our spring training series. It will be a series of one-day workshops held at various sites nationwide.

The topic is *Managing Audits and Program Reviews*. The training will discuss independent audits, program reviews, and Office of Inspector General reviews. Through group activity, it will assist you in formulating corrective action plans in response to these reviews. We will also review the FSA Assessments as a tool for self-evaluation. The workshop is designed for those thoroughly familiar with the Title IV programs.

The Indiana workshop will be on May

3, 2005, at the Indianapolis campus of Indiana Wesleyan University. Thanks to Lois Kelly for agreeing to host.

For those of you closer to Chicago, there will be a workshop in Chicago, at the Department's regional training facility. The date is May 12, 2005.

The announcement is posted to IFAP at <http://ifap.ed.gov/dpcletters/ANN0502.html>

Registration is required and is available at <http://www.ed.gov/offices/OSFAP/training/specific.html#managing>

Please let me know if you have questions. Hope to see you there.



Joyce Hall  
Director of Financial Aid  
Purdue University

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## '05 Leadership Symposium: A bit of cutting up – and not just cardboard!

Jacki Switzer

Should you ask any of the individuals who attended the 2005 Leadership Symposium to describe their experience to you, grab a nice, cold can of soda, sit back, and get ready to be regaled with stories of the fun they had! I believe all nine symposium graduates would describe the event as informative, relaxing, and just plain fun. The Marten House Hotel & Lily Conference Center in Indianapolis was *the place to be* on February 10-11.

The attendees were: **Amanda Day**—St. Mary-of-the-Woods College, Terre Haute; **Brenda Hopper**—Ivy Tech State College, Logansport; **LuAnn Hastings**—Rose Hulman Institute of Technology, Terre Haute; **Bill Wozniak**—Indiana Secondary Market, Indianapolis; **Michael Schmaltz**—Ancilla College, Donaldson; **Marga-**

**ret Richards**—EdFund, New Albany; **Ann Weitgenant**—Valpo University, Valparaiso; **Gabe Hinds**—Ivy Tech State College, Bloomington; and **Norm Newman**—IPFW, Ft. Wayne.

Each attendee brought a different and unique perspective. However, they worked well together. So well, in fact, that the judges had an impossible time choosing a winner for the team project.

The group was split into thirds and given a task to complete during the evening on Thursday. Each group was given specific items and told to build a sturdy, durable house with their items. Each team was given a cardboard box and sent off to work.

Boy, did we ever learn some really neat tidbits about every one of the

participants! It was unanimous that Gabe Hinds should really be doing architecture instead of financial aid! Amanda Day came out with green hands from the markers, and Norm Newman had quite a first-time ISFAA experience working with LuAnn and Ann.

Judging a winner was so difficult that we had to send out for additional prizes in order for each team member to receive a prize! There was no way to choose between them. Now that's talent!

You will get the opportunity to see the designs and artwork at the Spring 2005 Conference where they will be on display. Be sure to ask the participants about their experience.

The faculty for this year's symposium

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LEADERSHIP SYMPOSIUM, from page 4

was outstanding. Former ISFAA member **Vikki Goeke** was so kind to assist us with this project, and I was grateful for her input and assistance.

**Maralee Clayton** was the project mastermind, and without her help I definitely could not have managed all the preparations for the symposium.

**Richard Nash**, our resident photographer, was a big help in assisting our guest speaker on Thursday. I am sure

Richard will have some good photos to share during the Spring Conference.

**Janis Coopridner** made sure all the participants had a very nice welcoming gift—as well as making sure I stayed together!

I would like to extend a special thanks to **Bob Zellers**, ISFAA President, for being on site and networking with the participants.

The Leadership Symposium is the responsibility of the ISFAA Training Committee and occurs every other year...the next one will be in 2007. Other events which the Training Committee is involved in are: the NASFAA Workshops (Fall 2005) and the Support Staff Workshop (2006). I encourage everyone to watch for upcoming information about these ISFAA-sponsored events.

# ISFAA 70<sup>TH</sup> ANNIVERSARY CELEBRATION

## Spring Conference – April 10-12, 2005

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# TEAM ASA

## Thousands of Indiana Students and Families Receive Help With Financial Aid Forms at College Goal Sunday

On Sunday, Feb. 13, 2005, more than 3,700 Indiana students and parents attended College Goal Sundays to receive free professional assistance filling out the *Free Application for Federal Student Aid* (FAFSA), the financial aid form required by post-secondary educational institutions nationwide. Of the 3,751 attendees, 1,516 were students.

More than 420 individuals volunteered at College Goal Sunday sites in Indiana. Volunteers included college financial aid advisors, Twenty-first Century Scholars Program professionals, high school guidance counselors and other community volunteers with financial aid expertise.

"The Indiana Student Financial Aid Association (ISFAA) is proud to offer College Goal Sunday, an event that benefits thousands of families each

From 2 to 4 p.m.,  
financial aid  
professionals helped  
students and  
parents complete the  
FAFSA at 34 sites in  
29 cities across  
Indiana.

year," said Robert Zellers, ISFAA president and director of financial aid at Ball State University. "The FAFSA can be complicated, but ISFAA's volunteer financial aid professionals

make the process easier by providing free, expert assistance."

From 2 to 4 p.m., financial aid professionals helped students and parents complete the FAFSA at 34 sites in 29 cities across Indiana. Individuals seeking grants, scholarships and loans for higher education at any college or technical school nationwide are required to submit this federal form, which must be received by the federal processor by March 10. In the past 16 years, College Goal Sunday has helped nearly 70,000 individuals properly apply for financial aid.

Several College Goal Sunday sites showed an increase in attendance from last year, including Goshen, the Lawrence Central High School site in Indianapolis, Logansport, Marion, Michigan City, North Vernon and Plymouth. Nearly 1,000 students and

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## College Goal Sunday

families attended the six Indianapolis sites. The largest statewide attendance percentage increase came from the Goshen site, where 70 individuals including 22 students—participated in College Goal Sunday compared to 36 attendees last year, resulting in a 91 percent increase.

This year 11 sites offered assistance with FAFSA on the Web, which was used by 112 students and families, a 90 percent increase from last year. Additionally, 10 sites offered Spanish translation services.

“This year we saw many Hispanic students and families take advantage of the College Goal Sunday services in Goshen,” said Judy Moore, associate director of student financial aid at Goshen College and College Goal Sunday site coordinator in Goshen. “Our site offered three Spanish translators to provide these families the extra assistance they needed.”

From Jan. 1 through College Goal Sunday on Feb. 13, the Helpline received 415 calls from individuals.

Students who attended College Goal Sunday and submitted a completed evaluation form were entered into a drawing to win one of three \$300 educational prizes. Winners were announced in March, and prizes were sent directly to the higher education institutions selected by winning students.

College Goal Sunday is sponsored by the Indiana Student Financial Aid Association, in cooperation with Learn More Resource Center, the State Student Assistance Commission of Indiana and The Twenty-first Century Scholars Program. It is funded by Lilly Endowment, Inc., Lumina Foundation for Education and USA Funds, three Indiana-based nonprofits with a particular interest in higher education.

## USA Funds Accepts Applications for \$3 Million in New Scholarships

Kevin McKeown and Angela Spero, USA Funds Services

USA Funds® announced a total of \$3 million in new scholarships to assist college students with financial need.


Access to Education Scholarships® were offered to qualified students nationwide for the 2005-2006 academic year. In addition to the new scholarships, USA Funds awarded renewal scholarships to qualified recipients.

The program offers \$1,500 scholarships to qualified full-time undergraduate, graduate and professional students and \$750 scholarships to qualified half-time undergraduates.

Applicants for the scholarships must be enrolled or plan to enroll in coursework at an accredited two- or four-year college, university or vocational/technical school.

The program targeted students from households with annual incomes of \$35,000 or less.

The application deadline was March 15, 2005. Anticipating next year, remember to check out the USA Funds' web site at [www.usa-funds.org](http://www.usa-funds.org) and selecting “Scholarship Information” from the “Express Links” menu.



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## USA Funds Helps Schools Avoid Errors in Default-Rate Appeals

**Kevin McKeown and Angela Spero, USA Funds Services**

To expedite and ensure the accuracy of your cohort-default-rate-data appeal, USA Funds® recommends that you review the following list of five common errors:



### Bits and Bytes

William M. Wozniak, Editor

*Bits and Bytes* is published quarterly on behalf of the Indiana State Financial Aid Association

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**1. Student leaves one school and enrolls at another school before the grace period expires from the original school.** If a student's grace period has not expired, loans will not enter repayment until the student withdraws, drops to less-than-half-time attendance, or graduates from the subsequent school. Borrowers are not included in the cohort-default-rate calculations until one of their loans enters repayment. To determine if students have enrolled in another institution, schools should review National Student Loan Data System information for all schools for students. Providing information that a student left school in a different fiscal year is not, by itself, sufficient for challenging the data. Schools must be able to show that students did not attend another institution

after withdrawal. Schools that file a cohort-data challenge should include a screen print from NSLDS showing enrollment detail "For All Schools" for each student included in the challenge. Schools that file enrollment-status updates through the National Student Clearinghouse should include screen prints from the Clearinghouse so that guarantors can verify when status updates were reported.

### **2. Untimely or inaccurate updates.**

Lenders often will use the anticipated graduation date (shown on the loan certification by the school) as the last date of attendance if the school never has reported that the student has withdrawn or dropped to less-than-half-time attendance. In a cohort-data challenge, schools must be able to show that student-status changes were reported in a

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## Default-Rate Appeals

timely and accurate manner. The fact that a student withdrew or dropped to less-than-half-time attendance is one element of the challenge, but schools must be able to verify that the information was reported to the lender or the guarantor in a timely manner. For additional information and documentation to be included with a cohort-data challenge, refer to Chapter 4.11 (pages 4.11-2 through 4.11-8) of the U.S. Department of Education's Cohort Default Rate Guide, available online at [www.ifap.ed.gov/drmaterials/finalcdrg.html](http://www.ifap.ed.gov/drmaterials/finalcdrg.html).

**3. Student attends a school for a term, drops out for a term (or longer), and then later reenrolls.** When schools receive the Loan Record Detail Report, they may see the name of a student who currently is enrolled and decide that the data must be in error. If the student did not attend the school for a period of at least six months, some of the student's loans may have entered

repayment before the student reenrolled. Prior to filing a data challenge, schools should look carefully at the loans listed in the LRDR to be certain that the information listed for the specific loans actually is the information that needs to be corrected. In the data challenge, if you provide information that may be pertinent to other loans but has no bearing on the loan listed on the LRDR, your challenge for that loan will be denied.

**4. Correct cohort year for the date entered repayment versus the last date of attendance.** The "date entered repayment" is six months plus one day after the last day of attendance (or last date of half-time attendance). For example, if the student's LDA was March 30, 2003, or March 31, 2003, the DER would be Oct. 1, 2003 (FY 2004 cohort year). If the student's LDA was March 30, 2004, or March 31, 2004, the DER would be Oct. 1, 2004 (FY 2005 cohort year).

**5. Inclusion of Stafford loans that have been canceled or PLUS loans.** Schools mistakenly may try to include loans that have been paid in full by the student before the loan enters repayment. Stafford loans that are canceled or paid in full before they enter repayment status are not included in the cohort-default-rate calculation. Likewise, PLUS loans never are included in the cohort-default rate. Certain defaulted consolidated loans, however, may appear in the cohort-default-rate calculation when the underlying Stafford loans entered repayment during the cohort-default period. For a detailed explanation of which loans are included in the cohort-default rate, refer to the Cohort Default Rate Guide, Chapter 2.1 (pages 2.1-9 through 2.1-11).

USA Funds' policy staff can answer questions about the cohort-default-rate appeals. To reach the policy department, send an e-mail to:

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## NASFAA Launches National College Goal Sunday Web Site

### — Indiana Initiative Growing Nationally —

Washington, D.C. – The National Association of Student Financial Aid Administrators (NASFAA) has launched a Web site at [www.CollegeGoalSundayUSA.org](http://www.CollegeGoalSundayUSA.org) that provides essential information on financial aid for college. College Goal Sunday, currently offered in 18 states and the District of Columbia, is a free program that helps students and parents complete the universally required financial aid application form.

Over the past 15 years, College Goal Sunday has already helped more than 100,000 students clear the paperwork hurdle when applying for college financial aid. One day each year, traditionally a week or two after Super Bowl Sunday, qualified volunteers fan out to selected community sites across a state to help families fill out the Free Application for Federal Student Aid

(FAFSA), which is required to determine eligibility for most federal and state aid programs.

Rigorous public relations campaigns along with outreach strategies unique to each state are developed to reach the targeted population, which includes students from low-income families and those who are the first in their families to enroll in college. The success of College Goal Sunday de-

pends on the volunteer efforts of financial aid administrators and professionals from other organizations and community agencies working together to increase access to postsecondary education.

The national College Goal Sunday Web site links to participating states' College Goal Sunday sites, where details on dates and locations are provided. For those states that do not yet

*Additional support is provided through a College Goal Sunday electronic communications network, which connects states to each other to share best practices.*



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Web site home page for College Goal Sunday USA

have an active program, site visitors will find a link to financial aid resources in the state as well as a link to NASFAA's financial aid resource page at [www.StudentAid.org](http://www.StudentAid.org).

The College Goal Sunday Web site also provides technical support both for states that currently offer College Goal Sunday programs and states that are planning a program. Financial support for planning and implementation is provided by grants from Lumina Foundation for Education. NASFAA works with Lumina Foundation to provide training for new states.


Additional support is provided through a College Goal Sunday electronic communications network, which connects states to each other to share best practices. An "E-Newsletter" is also planned.

With Lumina Foundation support, NASFAA undertook management of the College Goal Sunday program in 2004 with the expectation of expanding it to at least 15 more states over a three-year period. "The response has been greater than we expected," said NASFAA President Dallas Martin. "We are delighted that states are contacting NASFAA in large numbers for assistance in applying for grants."

College Goal Sunday began in Indiana in 1989. The program was originally a joint project of the Indiana Student Financial Aid Association (ISFAA) and the State Student Assistance Commission of Indiana (SSACI) with funding from Lilly Endowment, Inc. Over the years, Lumina Foundation and its predecessor organizations have co-funded the Indiana program

and led the expansion into other states. In 2005, programs will be offered in Alaska, Arizona, Delaware, Hawaii, Illinois, Indiana, Kansas, Kentucky, Maine, Maryland, Massachusetts, Michigan, Missouri, Montana,

Nevada, Ohio, Oklahoma, Wyoming, plus the District of Columbia. Eight additional states are planning programs for 2006. For more information contact Marcia Weston, at [westonm@nasfaa.org](mailto:westonm@nasfaa.org).



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**ISFAA Series – Installment 1**

# Change Management: Oxymoron or Secret to Success?

What is Change Management? Giant Shrimp, Military Intelligence, Living Dead and Working Vacations all qualify as oxymoron's—matched words with opposite meanings. **Change Management** should be added to that list. Management's focus is on control and standardization. Change flies in the face of that control.

What about **Change Leadership**? Change is going to happen—sometimes whether we like it or not. The secret to making change a positive experience, both for your organization and for the people who inhabit it, requires a few basic steps that the usual Change Management completely overlooks.

- The first is to assess your staff and their receptivity to change in general. Some folks naturally love change, from hairstyles to wardrobes, from vehicles to residences, from work processes to office designs. These people love change and getting them on board is not the challenge. Others on your team, by their very nature, are resistant to change. Some simply get into a same ol', same ol' habit pattern.

For these people to welcome change requires some *selling* from the leadership. People willing accept change if they see how they personally will benefit. For leaders to blindly assume that everyone will jump at the "opportunity" for the good of the organization at the expense of the people is both naïve and wrong. There are others on your team who resist change, not because they are in a habit pattern, but because they truly are afraid of what might happen. For leaders to *sell* to these employees is a waste of time. They aren't concerned about benefits. They are afraid. Leaders need to include these employees *early on* in the planning process, *educating* them about how the new operation will work and providing them with the training so they can run the new software or implement the new process.

- Secondly, leaders need to include their staff in the change process. **You cannot over-communicate during a time of change.** Communication includes establishing a sense of urgency, a

reason why the change is needed, and how that change fits into the vision of the leader and enhances the mission of the team. Again, the *pioneers* on the team will jump at the drop of a hat, but the *settlers* will need to be brought along as the change is designed, implemented and finalized.

- Thirdly, leaders need to develop an *implementation plan*. Change will happen on its own if left unattended. Leaders need to develop a formalized *project plan*: including key phase diagrams, gantt charts, activity lists, and resource allocation matrices—so the change delivers the desired results.

Change can be fun when it is properly led. Change can blow up in your face when it is merely managed. Take a look at the changes you need to implement during 2005 and determine whether you have the right people, the right processes, the right tools and the right mindset. Be a *leader*, not a *manager*.

## ...and Finally...

Why is this picture here?

- A) To intimidate other state organizations
- B) Because Bob Z wanted it here
- C) To fill space

- or -

- D) To show the smiling faces of the Leadership Symposium attendees

