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## ISFAA University Spring Term Wrap-up

We had 189 students attend the ISFAA University Spring Term (conference) held at IUPUI on April 16. Many were returning students from our winter term although some new transfer students were eagerly welcomed into the mix as well. Together they brought energy, enthusiasm and a host of excellent questions which sparked very good interaction with our faculty.

It was good to have our special guest lecturer, Joe Russo, Retired Director of Student Financial Strategies from the University of Notre Dame, present with us to open our conference with a delving look at possible options for overhauling our financial aid systems nationally. Several of Joe's out-of-the-box what-if scenarios took us into considering new ways to serve our students and offered ideas on how we can better utilize limited resources to bring about higher levels of educational degree attainment within our state.



Joe Russo and Kim Bennett



Sandy Osborne

The concurrent classes offered a variety of subjects relevant to our daily operations and professional growth. Such topics as Verification for 2013-14, Best Practices in Training, Counseling Families on Education Funding: PLUS v. Private Loans, Non-Standard Academic Programs, Financial Literacy and Financial Leadership, and the 3 R's for Student Success each gave unique perspectives that prompted all audiences to deeply reflect on how we approach our work. The appreciation for the open dialog and idea sharing was evident in each course.

Continued on page 2



ISFAA Distinguished Service Award Recipient Bill Wozniak, and President's Award Winner Robert Sommers



**Angela Smith**

It was a pleasure to once again have our US Department of Education colleague, Angela Smith, join us to give the federal update as well as have one-on-one time to address individual legislative and regulatory questions.

Similarly, it was great to have our guest lecturer, Mary Jane Michalak, Associate Commissioner of the Division of Student Financial Aid for the Indiana Commission for Higher Education, with us to give insights on upcoming changes relevant to our Indiana state grant programs.

It appeared that the ISFAA University Spring Term was indeed a success, the time well worth the effort of all involved. We commend all of our exceptional graduates, and encourage them to take what they have learned and use it to make a difference in their world.



**ISFAA New Professionals Award Winner  
Liliana Ballge with ISFAA President  
Kim Bennett**

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## President's Perspective

As I sit at my desk and look outside of my office window trying to figure out if spring is really here, I am trying to think of what I want my article to say. I wasn't sure where to begin since this journey has been great so far. It's hard to believe that I am taking on a second term as President. But first and foremost I would like to personally thank Heidi Carl and the entire executive committee for all of their outstanding leadership and contributions this past year. They have all personally helped me transition to my role as President. I also want to say a special thank you to Thomas Ratliff for agreeing to serve as past president this year. I am eager and excited about this opportunity and welcome all of the challenges and triumphs that will come with it. I have been working on all of my plans and goals for ISFAA for this year and I am excited to share them with all of you throughout the year. My presidential

retreat will be soon and as I prepare my agenda I look at ISFAA and what we have done and I see so many great things. ISFAA will continue to do great things and I am happy to be a part of that. I want to take my role into a different direction and start to look to the future. What do we want from ISFAA in 5, 10 or even 15 years? How do we want to define who we are? Are there different ways to do things that we do right now? Change is something that we all need to embrace and I hope this is a year that we can start to see changes. Working in financial aid we know that change happens fast and we always have to stay one ahead of the next change. I want ISFAA to stay current and evolve to be one of the best associations in the country. I look forward to working with all of you this year. Remember to cherish the good days and smile as often as you can.



**Kim Bennett**

*I want to take my role into a different direction and start to look to the future. What do we want from ISFAA in 5, 10 or even 15 years? How do we want to define who we are?*



**Heidi Carl**



**Thomas Ratliff**

## SFA News



**Mary Jane Michalak**

Since January, much of my focus has been toward the Statehouse, as the 2013 General Assembly convened. This “session” was a budget session, which means

legislators meet for four months to discuss the budget for the State for the next two years. In total, the state of Indiana will invest approximately \$636 million in student financial aid in 2014 and 2015. Overall, financial aid funding represents 17.5 percent of the total higher education budget – the highest percentage since 1977. (I could make some of you feel old by telling you I was two years old at that time!) Additionally, legislators and Governor Pence supported an increased investment in financial aid by \$75 million over the biennium – 11 percent from 2013 to 2015. From 2013 to 2014, we will see the single largest increase in financial aid funding since 1977 – \$44 million. This increased investment will support implementation of HEA 1348, mentioned later in this article, but also adds funding to the National Guard program by \$800,000 per year.

In addition to keeping an eye on the numbers to ensure our students financial aid is protected, CHE attempted an ambitious legislative agenda, including recommendations to overhaul nearly all of the State’s programs. To give you some context, of the 1,259 bills that were filed, 294 (23 percent) passed; CHE had nine bills total – all of which became law.

The biggest effort came with House Enrolled Act (HEA) 1348, the Frank O’Bannon/21st Century Scholars/Part-Time Grant reform bill. Your Government

Relations team played an integral role in determining the final outcome of the bill, and I think we are all pleased with the outcome, outlined below:

- Beginning with students first entering in 2013-2014, requires students receiving the Frank O’Bannon Award to complete 30 credit hours their first year, 60 credit hours by the end of their second year and 90 credit hours by the end of their third year for an “on-time” award.
- Students who don’t reach those milestones may still receive an award, which will be a slightly smaller dollar amount, but must still complete 24 credits by the end of their first year, 48 credit hours by the end of their second year and 72 credit hours by the end of their third year.
- Beginning with students first entering in 2013-2014, requires students receiving the 21st Century Scholars Award to complete 30 credit hours their first year, 60 credit hours by the end of their second year and 90 credit hours by the end of their third year.
- Students who don’t reach those milestones may still receive an O’Bannon award, but must still complete 24 credits by the end of their first year, 48 credit hours by the end of their second year and 72 credit hours by the end of their third year. They can earn their way back into the Scholars program by increasing their credit completion up to the required levels.
- Beginning with 2013-2014, establishes “Annual Awards” rather than term-based awards, allowing students to have more flexibility in using their state financial aid. Students may use their awards year-round, taking advantage of lower summer tuition and allowing them to supplement their Pell dollars, which cannot be used during summer.
- Sets in law that an appeals process exists for students unable to meet above requirements.
- Sets in law that academic years do not have to be consecutive.
- Beginning with students first entering in 2013-2014, gives incentive for academic/technical honors diploma for freshman year only; these students must still qualify for O’Bannon to receive these awards.
- Beginning with students first entering in 2013-2014, defines academic honors incentive for sophomore, junior, senior year as 3.0 GPA or higher; these students must still qualify for O’Bannon to receive these awards.
- Beginning with students first entering in 2013-2014, defines an accelerated track incentive as 39 credit hours after the first year and 78 credit hours for the accelerated incentive; these students must still qualify for O’Bannon to receive these awards.
- Allows flat-dollar incentives at same amount for all students, regardless of school type student attends.
- Requires the Commission to set guidelines for degree maps by October 1, 2013; all students to receive degree maps for 2014-2015 academic year (publics only).
- Beginning with the 2014-2015 academic year, establishes a grid-

system for base awards based on the EFC of students, regardless of whether the student is dependent or independent. Requires the Commission to adjust the amount of the incentives, rather than the base awards, to stay within the amount appropriated for the awards by the General Assembly.

- Removes the tiered GPA policy and replaces the GPA with Satisfactory Academic Progress as defined by the institution. Removes the probation semester.
- Requires students receiving the Part-Time Grant to complete at least 18 credit hours per year to renew the Part-Time Grant starting with the 2013-2014 academic year.
- Requires students receiving the Part-Time Grant to enroll in at least six (6), but fewer than twelve (12) credit hours starting with the 2013-2014 academic year.
- Effective July 1, requires students receiving the Part-Time Grant to maintain Satisfactory Academic Progress as defined by the institution.
- Effective July 1, allows the Commission to reduce a student's Part-Time Grant if the student is eligible to receive tuition reimbursement from an employer or another outside source starting with the 2013-2014 academic year.

For those of you who may have missed it, at the Spring ISFAA Conference, I announced that SFA would be meeting with your Government Relations team to begin planning the implementation of the bill. This meeting took place on Tuesday, May 8, and we hashed out a number of details. However, there is still work to do, and I would like input from

as many financial aid professionals as possible. As such, I will be touring the state to six different locations in May and June to discuss the implementation and to take questions and comments. Details will be forthcoming both through the ISFAA listserv and our own listservs.

Additionally, the Indiana General Assembly passed HEA 1312, which paves the way for additional changes to the former state work-study program.

The legislation can be viewed in full at <http://www.in.gov/legislative/bills/2013/PDF/HE/HE1312.1.pdf>.

In short, EARN Indiana (Employment Aid Readiness Network) revamps the state's prior work-study program in pursuit of our mission to make college affordable through need-based financial aid programs. Students with financial need will have access to resume-building, experiential, paid internships, while eligible employers receive state matching funds in exchange for hiring these students. EARN Indiana is proud to partner with Indiana INTERNnet to better match students and employers to maximize each student's academic success and career achievement, in addition to assisting employers in finding the perfect fit for their team. Indiana INTERNnet is now fully integrated with the EARN Indiana program. Students and employers can register now at [www.indianaintern.net](http://www.indianaintern.net).

The new law codifies EARN as the formal name of the program and beginning in fall 2013 allows for-profit companies to participate in addition to postsecondary institutes, local or state units, and private, nonprofit organizations. The Commission will give priority to eligible employers that are organized as small businesses. Additionally, it allows students who have been offered a

need-based state financial aid award to participate, regardless of whether they have used the award. Students must be enrolled full-time during the academic year, but may work up to 40 hours a week if the employment occurs during the summer term and the student is not enrolled in courses during the summer term. If the student is enrolled in courses at the time of employment, the student is limited to 20 hours per week.

Students will need to register with Indiana INTERNnet at [www.indianaintern.net](http://www.indianaintern.net) before eligibility can be confirmed. After registration, students can determine their eligibility by completing the short form on their Student Dashboard. By answering a few simple questions, students instantly can learn their eligibility status.

Employers may now begin posting and designating available EARN Indiana positions to the Indiana INTERNnet at [www.indianaintern.net](http://www.indianaintern.net). After the necessary information has been submitted to post the internship, employers will have the opportunity to submit the position to SFA for participation in the EARN Indiana program. If approved, employers will be notified and contacted by SFA with additional information. We will be providing a more detailed guide to this process soon.

Each eligible intern and internship will be designated with the EARN Indiana logo to help both parties make an informed decision when filling the open position. EARN eligible students and employers will be able to search for each other using this EARN designation. Indiana INTERNnet also will consider the EARN status when making automated matches.

For a more detailed look at the program, please visit the EARN Indiana webpage, [www.in.gov/ssaci/2340.htm](http://www.in.gov/ssaci/2340.htm). You can



## SFA NEWS - CONTINUED

direct questions to Amanda Stanley at [astanley@che.in.gov](mailto:astanley@che.in.gov) or [EARNindiana@che.in.gov](mailto:EARNindiana@che.in.gov).

Finally, the biggest bill of the session – the Budget Bill – included several of our recommendations, highlighting their importance to many legislators. It established two student teaching stipend programs – one for Black and Hispanic students and one for individuals who plan to teach in a “high-need” field, which includes special education, and middle and high school math and science. The bill also modified the Minority Teacher Scholarship to allow the Commission to centrally administer the program and removed the occupational and physical therapy components and the special education

component. These three initiatives will reduce the work of financial aid administrators because the payments for the stipends will go directly to the students through the schools in which they student teach, and CHE will be collecting the applications and selecting students for the Scholarship. Many details of these programs have yet to be hashed out for implementation, but we will be establishing relationships with your schools of education to assist us with identification of students with financial need.

One other important note is that the budget bill established a new Primary Care Shortage Area Scholarship of \$3 million over the biennium for students attending Marian University.

As you can tell from the length of this article – if you got this far – we have a lot of work ahead of us, but it is an exciting time to be in financial aid. I am proud of the partnership CHE has built with ISFAA and hope you will join me at the location nearest you to discuss how we can implement these changes in the best ways. As our Commissioner for Higher Education, Teresa Lubbers, has said, “It is not an overstatement to say that Indiana’s future depends on the education level of our citizens. Increasing college completion is our passport to opportunity and prosperity, and we must embrace this challenge with a sense of urgency and shared responsibility.”



## Mark Your Calendars for MASFAA!

Where will you be able to hear the latest from NASFAA’s Justin Draeger and Craig Munier, choose from dozens of financial aid interest session options, and even ride in a race car? At the MASFAA Conference in Indianapolis this October of course!

The 2013 MASFAA Conference will be at the Indianapolis Marriott Downtown in wonderful Indianapolis from October 6th thru the 9th. If you haven’t already marked your calendars please do so now as this is an event you do not want to miss!

Interest sessions aimed to help financial aid administrators at every stage of a career are being prepared. The federal updates that help us with up to the minute news from Washington are on the agenda as well. For those that will be attending your first MASFAA conference there will be an event just for you to help you see you’re absolutely not alone.

MASFAA conference information including agenda items, lodging, transportation, and much more will be posted at [www.masfaaweb.org](http://www.masfaaweb.org). The most important thing right now though, is to mark your calendars to save October 6-9 for the 2013 MASFAA Conference in Indianapolis! The conference that begins the next 50 MASFAA conferences is one you will not want to miss. We’ll see you all in Indianapolis this October!



## Executive Committee Member Focus

### Steve Queisser



Steve Queisser

#### **1) Please tell Bits and Bytes about your current position at Edfinancial Services...**

I am the Vice President and Director of the Midwest Region encompassing all nine MASFAA States. We offer solution services including Call Center Services, Federal Verification Services, Early Intervention/Repayment Education Services and Default

Prevention/Delinquency Resolution Services. I enjoy the ability to travel the Midwest and assist schools with relieving administrative burdens that allows them to focus on counseling and advising students and families.

#### **2) How did you get your start in Financial Aid?**

I met the CEO of Edfinancial Services Tony Hollin over 15 years ago when I was in the radio business and as our friendship developed I included Edfinancial and Edamerica in many promotions and sponsorships. While managing the Tennessee Titans Radio Network he asked me for help finding a replacement for a VP of the Midwest Region who had resigned. I have a sister-in-law that worked for USA Group in Indianapolis years ago so I asked her for names I could offer to Tony. I was very proud of the list I developed and sent to Tony....he told me these people did not have what he was looking for. I gave up and attended a party at his house weeks later when I asked if he ever found a person for the MW job? He told me...and I quote, "No, I have been trying for weeks to hire this one guy but he is simply too stupid to figure it out!" Typical of me I ask if I know the guy and maybe I can prod him a little and help....he says, "It's YOU dummy!" a few drinks and several meetings later.... here I am!!!!

#### **3) Tell us about your current role with ISFAA and being on executive committee...**

I don't know my role yet! I was tricked by my former coworker Jacki Switzer into accepting the commissioner role with no knowledge of what the responsibilities are!! Jacki and now Kim have assured me that they both fully understood my obvious limitations and would make this

position as easy on me as possible. I am VERY excited however to be more involved in ISFAA, I grew up in Indianapolis and look for any excuse to "come home" and now even more! My son is an incoming freshman at Indiana University in Bloomington so meetings and ISFAA events take on new excitement....I get to come home AND see my son!!!

#### **4) You have been involved with financial aid since 2003. Do you have a memory about a student you helped that stands out in your mind that shows the good work that FA folks do?**

Yes, it was a young man at St. Xavier in Chicago. Long story short...he accepted his full financial aid award only to learn due to his tragic circumstances his loan and Pell Grant not only covered his cost of attendance it offered a refund. He thought he asked to return additional dollars but the school left the balance in his student account. Oddly, this continued for 2 years and the balance was accruing interest ...he was so mad at the world. Being a small company I went to Tony Hollin (our CEO) and he said tell the school to return the additional funds and then he did a most extraordinary thing....he paid the accrued interest out of his own pocket. The young man still sends me a Christmas Card every year!!

#### **5) Please tell us about other leadership roles you've had involving financial aid...**

I have been on the local arrangements committee for MASFAA for meeting in Cincinnati, Indianapolis and Chicago. I have presented at least once at every State conference in MASFAA and twice at NASFAA.

#### **6) You joined ISFAA in 2007. Please share your thoughts about the organization after over five years as a member...**

I believe my first ISFAA conference was actually in December 2003 at the Holiday Inn at Union Station....I love ISFAA. You have to understand how Hoosiers are special and when you do not live in the state you long for the camaraderie and traditions that are uniquely Indiana! It is always like a family reunion at ISFAA conferences and events...yes business is always covered, but so are family, friends and life!

**7) What is your favorite thing about your profession?**

The ability to travel and assist schools in any way possible to make their jobs and days a little easier while always serving students best interests!!

**8) Do you have a least favorite thing about your profession?**

Being away from home and missing days and nights with my kids!

**9) Do you have any thought or message that you would like to pass along to the other ISFAA members?**

Indiana is home for me, I love coming home and seeing friends and family. So many ISFAA members mean so much to me ...you helped me learn and navigate the world of financial aid without laughing at me too much. But what sticks out to me is the fact that when my brother and then my father passed away...it was my ISFAA friends and family that sent kind notes, special voicemails and even attended the funerals.....that is why ISFAA and Indiana is so special to me!



Since it's called financial aid, we think it should actually help students.

If you care about student success as much as we do, you should get to know us. We're Inceptia, and it's our mission to help your school help your students. Our holistic approach gives students the resources they need to succeed.

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# Should You Review Your Draft Cohort Default Rate Data? Yes (and How!)

By Doug Hess, Senior Marketing Associate Great Lakes Educational Loan Services, Inc.

While no sanctions or benefits are associated with the draft cohort default rates (CDRs) you'll receive from the U.S. Department of Education (ED) in February, there could be serious ramifications for your school if you don't challenge incorrect data while you can.

You'll have a 45-day timeframe, beginning six business days after rates are released, to challenge incorrect data. If you later discover errors in your official CDR data, certain appeals are unavailable to you unless you first challenged incorrect draft data.

If your CDR is near thresholds for sanctions or benefits, you'll especially want to review your draft CDR reports. But even if your rates are relatively low, keep in mind that, beginning with those entering repayment during fiscal year (FY) 2011, all borrowers will be tracked for three years rather than just two. This expands the length of time they can impact your default rate.

So you can see why it's a good idea to review your CDR data. But let's be realistic: It's hard to recognize incorrect data if you don't know what you're looking at—or for. Here are some basics to help make it easier for you.

## • Understand the CDR Calculation

Your three-year CDR is the percentage of your school's federal student loan borrowers who enter repayment within a cohort fiscal year and default on their loans during that fiscal year or either of the following two fiscal years. A cohort fiscal year runs from October 1 of the previous calendar year and ends on September 30 of the calendar year it represents (e.g., cohort fiscal year 2010 runs from October 1, 2009 through September 30, 2010). For more

information about CDRs and how they're calculated, see Understanding Cohort Default Rates.

## • Understand Your Draft CDR Reports

The report you receive from ED containing your CDR data is called the Loan Record Detail Report (LRDR). It may simply contain incorrect information. You can see page 2.3-6 of ED's CDR Guide for the fields that contain data most often challenged. But it's also possible that your data may incorrectly exclude, or include, borrowers who do, or do not, belong in that particular cohort.

The LRDR contains borrower information for Stafford loans that were used to calculate your school's draft or official CDR—including the borrower's name, Social Security number, last date of attendance, date the borrower entered repayment, date of default (if applicable), and loan type. Borrowers with multiple loans will be counted only once. You should check your LRDRs carefully for accuracy, comparing the information to the repayment date, default status, and cancellations/refunds shown in your school records.

You may find ED's Frequently Asked Questions useful—and you'll definitely want to print out tip sheets from ED's CDR Guide (for example pages 2.3-7 and 2.3-8) and keep them handy as you compare your school's data with your LRDR; they'll help you decipher codes on the report until you get used to them.

## • Avoid Common Errors Easily

When reviewing information in your LRDR, you can avoid two common errors with minimal effort.

**Check NSLDS for a student's enrollment status.** Students who have

withdrawn or dropped to less than halftime status may be taking classes that maintain their eligibility elsewhere. Save yourself precious time by getting the larger enrollment picture from NSLDS.

**If two entities are listed for a loan, make sure you send any challenges to the correct entity** (the one indicated with a usage code of "B" rather than with an "E"). Sending your challenge to the wrong servicer or guarantor can cause you to miss your deadline.

Watch for training opportunities through NASFAA as well as free webinars offered by loan servicers; they can help make this complicated task easier.

*Doug Hess is a Senior Marketing Associate with Great Lakes, serving schools in Illinois and Indiana. You can reach Doug at (800) 308-0161, or by e-mail at [dhess@glhec.org](mailto:dhess@glhec.org). Additional information about Great Lakes can be found online at [www.mygreatlakes.org/web/FAP](http://www.mygreatlakes.org/web/FAP)*

## • SIDEBAR: CDR BRAIN TEASERS

If you're confused about whose loans should and should not be included in CDR calculations, you're not alone! Here are a few case studies to get you warmed up before your draft CDR data arrives.

### Should these students' loans be included in your school's draft 3-year CDR for FY 2010?

#### Andre

Your draft 3-year CDR data for FY 2010 shows that Andre graduated from your school on November 4, 2009 and defaulted on May 8, 2012. His estimated date entered repayment (DER) was

May 5, 2010. According to NSLDS, Andre transferred to another school on February 4, 2010. Should he be included in your school's CDR? What further information do you need?

#### Paige

Paige graduated from your school on June 1, 2009, with an estimated DER of December 2, 2009. Since Paige paid her loan in full on July 1, 2009, should her loan be included in the denominator for your 3-year CDR for FY 2010? Why or why not?

#### Garrett

Garrett withdrew from your school on June 1, 2009, and defaulted on his loans on May 27, 2011. On December 4, 2011, he consolidated three loans in order to

regain Title IV eligibility. Should Garrett's loan be included in your 3-year CDR calculation for FY 2010? Why or why not?

#### Answers:

- No. Had Andre actually entered repayment on May 5, 2010 as assumed by your data, his loan would have been included for FY 2010. **However, if the DER is delayed by re-enrolling in school prior to the end of grace, inclusion in a CDR calculation is also delayed.** You need Andre's actual DER to make a determination. In this case, for example, Andre's return to school delayed his actual DER until (let's say) sometime in FY 2011. Given that actual date, his loan data should be included in CDR calculations for FY 2011 instead.

- No. **An estimated DER based on graduation is replaced by a new repayment date based on the paid-in-full date.** Since Paige repaid her loan in full on July 1, 2009 (in FY 2009) rather than entering repayment as anticipated in FY 2010, her loan should be included in CDR calculations for FY 2009. **This holds true for loans discharged due to death, bankruptcy, and disability as well.**
- Yes. **The date underlying loans entered repayment is the date used in the CDR calculation.** In this case, Garrett entered repayment during FY 2010 for the underlying loans on which he defaulted—and these loans should be included in your FY 2010 CDR despite the consolidation in FY 2011.



## Need another Private Loan option?

## Maybe ISM can HELP



For more information contact Bill Wozniak:  
[wwozniak@ismloans.org](mailto:wwozniak@ismloans.org)

# Indiana Youth Institute's Postsecondary Counseling Institute

The Indiana Youth Institute will be holding the third annual **Postsecondary Counseling Institute** on June 18-19, 2013, in Indianapolis. The PCI is a two-day workshop designed to give school counselors, mentoring organizations, and others who work with youth the skills and tools they need to help students explore a wide range of education options after high school, from traditional four-year colleges to apprenticeship programs. **We are offering workshops related to financial aid literacy**, and continuing education credits are available at no extra charge.

Complete details and registration are available at [www.iyi.org/pci](http://www.iyi.org/pci).

## This year's workshop topics include:

- Enhancing Your Financial Aid Literacy
- Trials and Tribulations of Preparing College Applications
- Navigating and Understanding the Admission Standards of Indiana Colleges
- Creating a College-going Culture
- AP and Dual Credit/Making Every Credit Count
- Indiana Career Explorer/Teaching Career Exploration
- Building Relationships Between Middle and High School Counselors/Preparing Middle School Students for High School
- Apprenticeships, Certificates and Workforce Credentials

- Leadership in Increasing and Supporting AP Participation and Success for Underserved Populations
- Understanding the AP Potential Report to Increase AP Participation
- Dual Credit and the Early College Model

All participants will receive an electronic copy of the College Board's **College Counseling Sourcebook**. And the event includes a free screening of the inspiring documentary **First Generation**.

Registration: **only \$100**. Register today at [www.iyi.org/pci](http://www.iyi.org/pci), plus learn more about the keynote speakers, agenda, and exhibitors.

## Resources for your college questions

WELLS  
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**When it comes to education financing, Wells Fargo wants your students and their parents to make the choice that works for their family.**

Using the variety of resources Wells Fargo provides, your students and parents can get answers to their college questions:

- **CollegeSTEPS® program:** students get emailed information about a range of topics from managing campus tours to navigating the financial aid process.
- **Wells Fargo Community:** students and parents can have conversations about college planning with other students, parents, financial aid officers, and more.
- **Student LoanDown<sup>SM</sup> blog:** students and parents can get information, share stories and ask questions about paying for college, managing debt and more.
- **Calculators and budget worksheets:** families can use these tools to crunch the numbers necessary to plan for college.



**To learn more, students and parents can call or click today.**

**1-800-658-3567**  
**[wellsfargo.com/student](http://wellsfargo.com/student)**



## 2013 ISFAA Spring Conference



Richard Nash, Deb Schumm, and Marvin Smith attended the Leadership & Legislative Conference is an annual three-day event, held in the Washington, D.C. area. The Conference provides intensive preparation for NASFAA

members in association leadership positions, about to assume such positions, or who aspire to association leadership roles.



**College Goal Sunday Wrap-Up Meeting**



**NASFAA President Justin Draeger, Deb Schumm, and Richard Nash**



**ISFAA Government Relations Committee Meeting with CHE and SFA Staff Members**

# SAVE THE DATES!



Nearly 3,000 financial aid professional from across the country attend the NASFAA National Conference each year to learn, network, and share best practices. The Conference offers a wide array of sessions and programming for experienced, intermediate, and beginning financial aid officers. Nowhere else can you get the depth and breadth of professional development opportunities all in one place!



## 2014 NASFAA Conference

Nashville, TN

Music City Center, June 29 - July 2, 2014



## 2015 NASFAA Conference

New Orleans, LA

Hyatt Regency New Orleans, July 19-22, 2015

## NASFAA's 50th Anniversary Conference

Washington, DC

Marriott Wardman Park, July 10-13, 2016

National Association of Student Financial Aid Administrators  
1101 Connecticut Avenue NW, Suite 1100, Washington DC, 20036-4303  
Telephone: 202.785.0453 Fax: 202.785.1487 [www.nasfaa.org](http://www.nasfaa.org)





# Comings and Goings

...and other tidbits of association news .....

Sue Allmon

## Comings

**Kathy Moore** returns! Kathy Moore has accepted a position on Lisa Chambers State aid team for IUPUI. She started working for Lisa on March 18th. Welcome back Kathy to the wonderful land of financial aid!

Ivy Tech Community College – Bloomington is happy to report that **Mary Behling** has joined the financial aid staff as an Assistant Director.

I would like to announce that **Christina (Chris) Maggart** has joined the financial aid community at Anderson University. Chris has worked for the University for eleven years in different departments. She joined the office April 1 of this year. She is married to Glen and between them they have 4 teenage boys. She is also busy with classes and will become an AU Grad this August with a BA degree in Family Science.

A big ISFAA welcome to **David Peterson**, the new Financial Aid Director at IPFW effective May 1st. David comes to ISFAA from Methodist College in Peoria, Illinois where he was Dean of Enrollment Management. He replaces Gerald Curd who was interim Director and has retired from IPFW effective 4/30/2013.

The Commission for Higher Education's Division of Student Financial Aid announces several team changes. We welcome **Rachel Meyer** as a new student financial aid advisor in the Awards Division and **Mark Jones** as a new applications systems analyst in our IT Division.

## Transitions

The Commission for Higher Education's Division of Student Financial Aid announces several team changes. **Amanda Stanley** will serve as the new point person on the EARN program. Finally, **Sam Snideman** will be transitioning to report to the newly promoted **Sarah Ancel**, who now serves as CHE's Associate Commissioner for Policy and Planning. As we announced in March, Sarah continues to have a role in financial aid issues, as will Sam, but both are focusing on broader higher education policy in addition to financial aid. This is part of the continued integration of the former SSACI with the CHE.

## Promotions

**Joel Short** has been promoted to Director of Financial Aid for Goshen College. He starts his new position on July 1st.

**Liliana Ballge** has been promoted to Associate Director of Financial Aid for Goshen College with the retirement of Judy Moore (see Retirements below).

**Jennifer Hull**, with Harrison College, has been promoted and is now the multi-campus Director of Financial Aid for the Fort Wayne and Columbus, OH campuses.

## Goings

**Ben Grimwood**, Ivy Tech Bloomington, has taken a position with the Ivy Tech Admissions Office. Ben was key in coordinating the College Goal Sunday volunteer and media efforts this past year.

**Kristi Eidson**, formerly the Financial Aid Director at Ivy Tech Community College-Evansville has left ISFAA to join the ranks of KASFAA. She has accepted the Director of Financial Aid and Compliance position with Brescia University in Owensboro, KY. She started "on the other side of the river" on April 16th.

**Donna Rush** will be leaving the Financial Aid Office at Purdue University to move to Purdue's ITAP (systems unit). Her last day with the Financial Aid Office will be May 10th.

The Commission for Higher Education's Division of Student Financial Aid will say goodbye to several team members.

**Andrew Troemner** in our Research Division, **Courtney Kneis**, our long-term intern in the Awards Division both departed on May 10, and **Kristin Casper**, our EARN director, leaves May 24.

## Retirements

**Judy Moore**, soon to be retired Financial Aid Director at Goshen College writes, "My last day in FA is June 28. I plan on a trip to Alaska, a new grandchild and lots of time to spoil the others rotten!"



# Comings and Goings

...and other tidbits of association news .....

Sue Allmon

## Retirements continued

**Gerald Curd**, upon his retirement from IPFW, wanted to share this with the membership: *Please put a note in the newsletter about my appreciation for all the support and encouragement I have had in my involvement with ISFAA and the great times I have had in working with a even a greater group of people in the Financial Aid profession. I am retiring after a total of 27 years in the Financial Aid profession, 16 in Arizona and 11 in Indiana. My wife and I will be returning to Arizona to be close to family and to enjoy retirement in a warmer environment. I will miss all the friends I have made in Indiana, my staff at IPFW, and the Fort Wayne area. It has been a great place to wrap up my career.*

*Georgia. My husband and I made a quick drive to Atlanta then stayed up all night in the hospital waiting room to greet the little guy on the morning of his birth."*

## Births



**Doug Irvine**, retired FAD, writes in that grandson "Samuel Robert Irvine, 4/25/2013, w - 8 lb, 3 oz. l - 21 1/2" He joins big brother Thad (2 1/2) and parents Rob and Bethany Irvine. Another reason for more frequent trips to Brownsburg"



Robert Sommers writes Jetty Jane Edgel – born to **Molly and Jeff Edgel**. Molly works in the financial aid office at Huntington University. Jetty was born April 9th and is Molly & Jeff's first child. Significance of name: Jetty is a structure in a body of water that influences the current or tide. Jane means God is gracious. Molly and Jeff pray that their little girl is a graceful influence on her world.



**Linda Hunt**, Hanover College, writes "Townes Stephen Denver Hunt (middle names are from living great-grandfathers) born April 6, 2013 to my son Nate and his wife Allix Magaziner, both attorneys in Atlanta,

## Save the Date



## 2013 NASFAA Conference

July 14th – 17th  
Las Vegas, Nevada



### Bits and Bytes

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### Deadlines for Article Submission

Sept. 25 for October Issue  
Nov. 25 for December Issue  
Jan. 25 for February Issue  
Apr. 25 for May Issue

Thanks