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# Bits & Bytes

Newsletter of the Indiana Student Financial Aid Association

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## 2022 Counselor Workshop Series Recap

The 2022 edition of the Counselor Workshop series is now over but the events that covered Indiana from Hammond to Evansville, and Hanover to Fort Wayne, grew from 2021 and were very well received. Just short of 700 counselors registered for one of the 13 workshops that once again featured presenters from the Commission for Higher Education and ISFAA experts as well.

Updates on state and federal aid including important changes that are coming were again main topics for the morning events. A special focus on the 21st Century Scholar program and a look at the latest news on

all student loan forgiveness items were also on the agenda.

ISFAA sends a "thank you very much" message to our partners and friends from the Commission who presented at every workshop. A thank you as well to the ISFAA experts who gave their time for this important initiative, and of course to the schools that opened their doors and rolled out the red carpet to make this all possible.

Survey responses and emails have been very positive and the hope for 2023 is another successful series of workshops and even more attendees to participate!

[more photos on page 2](#)



## 2022 COUNSELOR WORKSHOP SERIES RECAP— CONTINUED



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## President's Perspective

Happy Fall ISFAA Members!

It was so nice to see the leaves start turning colors as it started to slow down in the office. Our students are back in school and most are getting ready to register for spring classes. In case someone hasn't already said it, thank you for all of the hard work and dedication you give to your students every day.

We are coming up on a very busy fall for ISFAA. Our High School Counselor Workshop committee wrapped up their visits to 13 sites this fall. We also have our Support Staff Workshop scheduled for Wednesday, November 16th at IUPUI from 9am-3:30pm. Registration is now open and is free to all ISFAA members. Please register on our website at [ISFAA.org](https://www.isfaa.org)

College Goal Sunday is asking for volunteers for their fall event on Sunday, November 6th. You can register to be a volunteer on their website at [collegegoalsunday.org](https://collegegoalsunday.org). The committee was able to secure 39 sites this fall. We will again be awarding scholarships for filling out a survey at the event.

Our conference program and site committees are working hard to plan our annual conference. Make sure to save the date for March 8th-10th, 2023. It will be at the Drury Plaza Hotel on the north side of Indianapolis.

We've also been working hard on a 5-year strategic plan for our organization. We will present the plan at our annual conference. We want to increase and enhance ISFAA membership; continue to offer professional development

opportunities; and bring more opportunities to our members. We will have a full plan to present as well as ways we will attain those goals.

Our electronic communication committee has been hard at work updating our organization's website. There are many new features available, and more are still planned to be added. Our Outreach committee updated the high school regional coordinators list to help high school counselor's find financial aid professionals that can present in their area. We've started to add the board minutes to the website so you can learn more about what happens at those meetings. We've also created a page for leadership and standing committees. You will find the names of those on the board, and in chair positions. And a new resource page was created for Access, Equity, And Diversity resources for our personal growth and for our profession.

We are currently asking for members to volunteer for the upcoming year with Megan Watson as president. The volunteer form is available on our website. Please complete the form to let us know you are interested in helping with our activities and events.

As you can see we are working hard behind-the-scenes to create more member opportunities. We are trying to deepen our focus on the members, so we can present more avenues or things you need the most for your job. Please stick with us as we unfold our plans for the organization. It is a great time to be involved with ISFAA, and I look forward to unveiling our plans to you soon.



**Lisa Bridgewater**

We are trying  
to deepen  
our focus on  
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for your job.

# Committee Spotlight: Pat Wilson Scholarship

by: Kelly McGuire



Pat Wilson

What is legacy? A legacy gives you an opportunity to live for a purpose that's bigger than yourself. It allows you to foster change for generations to come. It's making the active decision to bless those around you. Although I never had the privilege of meeting Pat Wilson, I believe she lived for helping others.

In talking with friends and former colleagues, I've learned that she was extremely serious about her work always striving to find new and improved ways to help students. From creating resources and presentations, to conducting Financial Aid Nights and Entrance/Exit counseling sessions, she was up for any challenge. She was also very passionate about ISFAA.

Pat was a long-time member of ISFAA, very active on committees and promoting the goals of our association. She received the ISFAA Distinguished Service Award in 2001, and continued to inspire her friends and colleagues during her battle with cancer. Sadly, she lost that battle in 2005. ISFAA wanted to honor

her and her legacy so beginning in 2007 a scholarship was created in her memory. Each year a silent auction is held with 100% of the proceeds going to the scholarship fund. From those funds a \$1,000 scholarship is awarded to a student from the institution of the current ISFAA president. The mission of this scholarship is to recognize students who are devoted to helping others within their community by being involved in supportive activities that provide encouragement and assistance with access to financial information in order to fulfill their educational goals.

As we inch closer to this holiday season I encourage you to consider making an additional purchase of an item for the silent auction. Pat was passionate about supporting students in their academic endeavors and was willing to do anything within her power to provide support and opportunities. An item for the silent auction helps to ensure this scholarship continues to be available for future students and that Pat's legacy lives on.

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# Indiana's New Messaging Strategy Promoting the Value of Education to Launch in November



## INDIANA COMMISSION for HIGHER EDUCATION

Over the past 18 months, the Indiana Commission for Higher Education and its partners at the Governor's Workforce Cabinet and VOX Global have undertaken in-depth qualitative and quantitative research, focus groups and surveys to understand why Hoosiers are – or increasingly aren't – choosing to pursue higher education.

The Commission's [most recent](#) data show just over half (53%) of students are pursuing college after high school graduation (first-time students pursuing anything from a short-term credential up through a four-year degree). There has been a steady decline in the college-going rate in Indiana for several years, however, from a previous height of 65% in 2015.

Through its "[Education Value Movement](#)," the Commission has created a new message framework to better deliver positive messages around the value of higher education for individuals and for the state as a whole. Based on the Commission's research, state leaders believe a positive messaging and communications movement can overcome the negative narrative that increasingly overshadows the

benefits of higher education. This can be accomplished by equipping trusted messengers – such as family, friends, educators and community leaders – with tools, information and resources to encourage high school students and adult learners to pursue a degree or credential beyond high school.

As part of the movement, the Commission is training and providing new resources to its partner state agencies, educators, non-profit organizations, community- and faith-based groups, philanthropic teams and more about the importance of language and messaging about college with a goal of helping to stem the college-going decline and encourage more Hoosier students and adult learners to pursue some form of education or training beyond high school.

In November, the Commission will relaunch the [Learn More Indiana](#) website with a fresh look and feel, easier navigation for students and families, updated resources for educators and [21st Century Scholarship](#) recipients. The Commission will also debut a new marketing campaign promoting the value of education.

Anyone who is interested in learning more about the Commission's work or connecting with a staff member can provide a training opportunity can reach Charlee Beasor at [cbeasor@che.in.gov](mailto:cbeasor@che.in.gov) or by calling 317-232-1060.

## ISFAA.org Website Tip:

If you or your organization are looking for potential job candidates within the financial aid community, ISFAA.org can help. Simply send your listing to Nathan Lohr at [lohrn@uindy.edu](mailto:lohrn@uindy.edu) or Brandon Kuntz at [bjkuntz@iufw.edu](mailto:bjkuntz@iufw.edu). Please include the position title, location, and posting timeframe when submitting a listing.



Current job postings can be seen at: <https://www.isfaa.org/employment-listings>, or by selecting "Employment Listings" in the "Quick Links" panel of ISFAA.org.

## Executive Committee Member Focus

### Joel Short



Joel Short

#### **1. Please tell Bits and Bytes about your current position at Notre Dame**

I'm a Senior Assistant Director of Financial Aid at Notre Dame. A primary focus of my job is completing financial aid decisions for both Incoming and returning students. I also oversee our R2T4 process, VA benefits, and help assist with state aid administration.

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

Directly out of college, I was offered a job in the Admissions Office at Goshen College. I worked as an admission counselor for two years and found that I really enjoyed working in higher education. However, I knew that job wasn't a sustainable position for me. Luckily, there was an opening for a financial aid counselor job at Goshen College. I applied for that and was offered the job. Sixteen years later, I'm still working in financial aid.

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

I'd been involved with ISFAA for a long time before I ever considered running for a position on the Executive Board. Initially, my main involvement was working on the College Goal Sunday committee. I've also served on the Training and Development committee, and I currently serve on the VA advisory committee. After many years of being a member of ISFAA, I finally decided to run for one of the delegate at large positions on the board in 2019 and surprisingly I was elected. I served in that role for two years before being asked to serve as Commissioner for Internal Operations, which is my current position on the board.

#### **4. You have been involved with financial aid for 16 years. Do you have a memory about a student(s) you helped that stands out in your mind that shows the good work that FA folks do?**

There are several students who come to mind that came from lower income, first generation families. There wasn't anything magical about what we did, but we tried to provide a welcoming space where they could get the assistance they needed in terms of filling out forms and accessing the funds they needed to get into college. Seeing those students not only enroll in college but thrive during college and eventually graduate and become successful professionals is probably the most rewarding part of this profession for me.

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

I was fortunate to be able to take the inaugural Certified Financial Aid Administrator (FAAC) test. I was asked by NASFAA to serve on a taskforce to help write questions for future FAAC tests. The process took most of a day and a half, and was done entirely through zoom. I had never been apart of anything like that before. I often hesitate to say yes to things because I feel like I'm not qualified, but I'm so grateful that I said yes to that opportunity.

#### **6. You joined ISFAA in 2006. Please share your thoughts about the organization after 16 years as a member...**

I love being a part of ISFAA, which has allowed me to meet so many wonderful colleagues from across the state. This was incredibly helpful to me when I served as Director of Financial Aid at Goshen College as I had a network of colleagues to reach out to when I needed counsel from other financial aid experts. Certainly, the past few years I feel like ISFAA has done a good job of providing training opportunities to its members.

Continued on page 7



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

There are many things that I love about being in this profession. I guess my favorite thing is seeing the reaction of a student and their family realize they can afford the college of their choice.

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

Besides dealing with angry parents, I think the other least favorite part of the profession is when I know I've done everything I can to help a student or parent, but it still just isn't enough.

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

I would encourage people to get involved with ISFAA by attending a conference, joining a committee, or even consider running for an elected position. Being a part of ISFAA and other professional organizations has been one of the most rewarding parts of my career. I'm also very grateful for my bosses both current and former and the fact that I've worked at two wonderful institutions that have encouraged and supported my involvement in ISFAA and other professional organizations.

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## Indiana Represented at NASFAA and MASFAA Conferences



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## Delegate-At-Large, Nicole Trice



**Nicole Trice**

Education has made a huge impact in my life! Financial Aid has been a part of my life since 2000 when I first started attending college. After graduating college, I have had the privilege of serving students seeking higher education for over 17 years. I worked for 10 years as an Advisor and Assistant Director for the Educational Opportunity Center (EOC), a TriO program,

where I assisted students with reaching their college goals through the completion of FAFSA's and other financial aid requirements. Wanting to continue to grow that experience and assist more students, I found a new path at Purdue Fort Wayne in the roles of Compliance Coordinator, Assistant Director and then as an Associate Director. During that time, I became a member of ISFAA, MASFAA and NASFAA. I was able to earn several NASFAA Credentials through MASFAA as well as give back by teaching some credentials for ISFAA members. In February I accepted the position the Director of Financial Aid Processing at Ivy Tech Community College.

My experience with committees and being involved in financial aid memberships was a little out of order. I have served on the MASFAA Program Committee and was also taught a few credentials during the Summer Institute. Within the first few months of starting in financial aid, I was able to attend MASFAA. It was an eye opener to how much I still needed to learn. I was able to attend the MASFAA Summer Institute the first summer of being in financial aid. While there, I learned a lot about financial aid, achieved several NASFAA credentials as well as met several financial aid professionals who made a significant impact in my financial aid career. MASFAA was where I learned about ISFAA and how I can be a part of my state organization.

Education continues to play a major role in my life. Currently, I am serving as part of the Training Committee and as a Delegate-at-Large for the Executive Committee. Several responsibilities cross between these two positions. I enjoy learning of new ideas and concepts that my peers are able to share as well as what our financial aid community wants to learn. I have enjoyed learning more about the history of ISFAA, how it has grown and the direction it is going. ISFAA is a valuable asset to the community! We are all here with the same goal in mind, which is to serve our students and help them to be productive members of society.

*"Knowledge is power. Information is liberating. Education is the premise of progress, in every society, in every family."*

-Kofi Annan

ISFAA has opened many doors for its community and members. Some of the opportunities that stand out to me the most are helping to train our financial aid community through offering NASFAA credential training and tests and the conferences held each year. To do this, it takes several different committees to make this possible. ISFAA provides helpful services such as bringing in state, regional and national representatives to help us stay up to date on regulations. ISFAA also provides opportunities for us to learn from one another through connecting and networking with other financial aid professionals, institutions and agencies. I encourage all to get involved in ISFAA, not only as a member, but on a committee. Thank you ISFAA for allowing me to have this experience and I look forward to all of the opportunities ISFAA has yet to come.



**Save the Date**  
**NASFAA 2023**  
**June 29<sup>th</sup> – July 2<sup>nd</sup>**  
 at the  
**San Diego Conference Center**

## Information from the Strategic Planning Committee

The last few years for financial aid professionals have been interesting. We've had to learn to be adaptable and flexible with our changing circumstances. Just like the financial aid profession our association has also had to be adaptable. With our strategic plan outdated, our board felt it was time to create a new plan that will carry our association forward the next several years and help us refocus our goals and initiatives.

Late 2021, ISFAA partnered with outside consultants, Stephen Hundley, and Caleb Keith from IUPUI to help guide us down a path of creating a new strategic plan for our association. A committee was formed with a diverse group of members to represent various institutions across our state and varying levels of involvement with ISFAA. Our committee has spent time evaluating the current landscape of higher education and conducting a situational analysis of ISFAA. February 2022 a membership survey was sent out to collect feedback and ideas. We've been using that feedback to guide our process.

ISFAA's vision is to be a dynamic, affordable, broadly representative member-driven organization providing advocacy, mentorship, and professional development for its members to promote and advance the field of financial aid administration in the state of Indiana through intentional engagement with students, families, and other stakeholders.

While the committee is not ready to unveil the entire strategic plan at this time, we can share some of the goals that the committee has identified during this process.

1. Increase and enhance ISFAA membership and member engagement by promoting the distinctiveness and benefit of ISFAA to various association stakeholders.
2. Offer ongoing professional development opportunities to meet ISFAA members' needs.

Continued on page 11

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3. Embed diversity, equity, and inclusion within and throughout ISFAA operations, including the leadership pipeline and infrastructure.

4. Increase outreach and cultivate partnerships to promote student aid and postsecondary education's benefits to ISFAA's stakeholders in various communities and contexts.

5. Create and maintain an infrastructure for sustainability, planning, and fiscal stewardship to support ISFAA's ongoing mission to be an engaging, member-driven association.

The committee is in the final phases of the strategic planning process. It is our intention to share the full plan with membership at our upcoming conference in March. We hope that you will continue to share ISFAA's vision and help us accomplish the goals that we have outlined, by volunteering and getting involved with ISFAA. Lastly, a special thank you to all the committee members that have volunteered and engaged in this fundamental process.

- Megan Watson (IUPUI; ISFAA President Elect)
- Alex DeLonis (Wabash; ISFAA Training Commissioner)
- Joel Short (Notre Dame; ISFAA Internal Operations Commissioner)
- Jennifer Reeves (IU Bloomington; ISFAA Treasurer)
- Kelly McGuire (Trine; ISFAA Pat Wilson Scholarship Chair)
- Melissa Smurdon (Butler; ISFAA Delegate at Large)
- Vinny Vincent (Franklin; ISFAA Training Chair)
- Julie Wonderlin (Ivy Tech Terre Haute; ISFAA Past President)
- Rob Wirt (Ball State; ISFAA Past President)
- Steve Queisser (Student Connections; ISFAA Associate Committee Chair)
- Sarah Owen (Ivy Tech; ISFAA Past Treasurer)
- Sarah Soper (IU East; ISFAA Past President/ Membership Chair)
- Scott Thum (Indiana Tech; ISFAA Member)
- Tammy Murphy (Indiana Wesleyan University; ISFAA Member)

- Candice Sutliff (Rose Hulman; ISFAA Outgoing President)
- Lisa Bridgewater (IUPUI; ISFAA Incoming President)
- Stephen P. Hundley (External Consultant)
- Caleb J. Keith (External Consultant)



**ISFAA**

# Support Staff Workshop

**When**  
November 16, 2022  
9:00a - 3:30p

**Where**  
IUPUI  
420 University Blvd  
Indianapolis, IN 46202

**Cost**  
ISFAA Members: FREE  
Non-ISFAA Members: \$50  
(includes membership)

*Parking and Lunch Included*

**REGISTER AT [WWW.ISFAA.ORG](http://WWW.ISFAA.ORG)**



# Comings and Goings

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

Sue Allmon

## Comings

**Heather Hunt-Gonzalez** joined the Ivy Tech-Bloomington FA team as an Assistance Director. Heather will be taking on the oversight of the Federal Work Study program in addition to other counseling and administrative duties.

**Gwen Tucker** has been recently hired as part of Ivy Tech-Bloomington's F.A.S.T. Office (Financial Aid Support Team). Gwen is a Financial Aid Assistant and provides support for customer service, scholarship awarding and general administration.

**Eugene Johnson** has landed a gig at INvestEd as the Program Director, Indiana Career Accelerator Fund.

**Barbara Auman** will be joining the Ivy Tech Community College- Terre Haute campus as an Assistant Director of Financial Aid on October 24, 2022. Barb worked part-time at the campus a few years ago and recently worked in the financial aid office at Indiana State University. She is taking the position left by Heather Frye (see Deaths below).

## Transitions

**Sarah Soper**, Executive Director, Student Financial Services, IU-East will be transitioning to Jenny Stephens position with Indiana University upon her retirement (see retirements). Sarah will assume the role of University Director of Financial Aid, University Student Services and Systems for Indiana University

## Promotions

**Alex Williams** was promoted from Assistant to Associate Director for Ivy Tech-Bloomington in August, 2022 (just in time for the start of the school year!). In addition to counseling and other duties, Alex oversees the foundation scholarship management and awarding processes, serves on statewide committees and provides training to financial aid and other Ivy Tech staff.

## Retirements

**Angela Reshad**, University of Evansville, retired from the University on May 31, 2022.

**Carrie Bishop**, Director of Financial Aid Training & Compliance for Ivy Tech Community College officially retired on September 2, 2022. Enjoy your retirement Carrie – very well deserved!

**Jenny Stephens**, University Director of Financial Aid, University Student Services and Systems for Indiana University will be retiring on December 31, 2020. Side bar: I am SO jealous!! Best of luck Jenny in your retirement and new endeavors!

## Births



Aquila James Tipton

**Garnet Tipton**, Associate Director for Graduate Studies, Hanover College and his wife have added to their family! In July, 2022 they welcomed their third child, Aquila James who is being closely supervised by his two older sisters



Bo Kacee

**Desire Contreras**, Financial Aid Administrator for Western Governors University, has recently become a Great-Grandmother! Great Grandson Bo Kacee was born on 9/25/2022.



Jack

**Catherine Nickens**, Senior Assistant Director, Student Financial Assistance at the University of Southern Indiana has recently become a grandparent! Jack arrived on October 9, 2020 and he is a cutie!

## Deaths

**Heather Frye**, Assistant Director of Financial Aid, Ivy Tech Community College – Terre Haute passed away on August 16, 2022. She was a vital member of the financial aid team in Terre Haute and she will be greatly missed.

**David Hoover**, retired Financial Aid Director, St. Joseph's College passed away on October 6, 2022. His daughter, Erica, wrote that he had emergency abdominal surgery on August 19th and just was not able to bounce back. She said he always wished that he would have been able to get back to one of the monthly meetings-he so enjoyed catching up with everyone.

## Good News Announcements

**Patt McCafferty**, Financial Aid Director, Ivy Tech-Bloomington presented FA 101 for a parent high school financial aid night at Bloomington South High School in September. This marks the 30th year for Patt to present at this school! Way to go Patt!!

## Support ISFAA by shopping at AmazonSmile

Did you know you can support ISFAA each time you shop on Amazon? ISFAA is one of the charities you can choose on AmazonSmile. ISFAA will get a donation each time you shop at no additional cost to you! In 2021, we received almost \$50 in donations from AmazonSmile to help fund ISFAA, and we are very close to that already for 2022.

You can add ISFAA as your charity by using ISFAA's direct link – <https://smile.amazon.com/ch/35-1597706>. After you've selected ISFAA as your charity, you can shop via this link, from [smile.amazon.com](https://smile.amazon.com), or on the Amazon app with AmazonSmile activated.



*Shopping on the regular [amazon.com](https://amazon.com) site without "smile" at the beginning, does not generate a donation to ISFAA.*

For more information about the AmazonSmile program please visit:

<https://smile.amazon.com/charity/smile/about>

## From the Training Committee...

The Training Committee is hard at work setting the training schedule for the 2022-23 academic year. As we continue to secure locations, set dates/times and prepare our training materials, we want to inform ISFAA members of our current status:

### **NASFAA Training Credentials being offered: R2T4 and Cash Management**

- Dates/Times and locations being finalized

### **Monthly Virtual Training opportunities**

- Date/Times being finalized

### **THE FUTURE OF FINANCIAL AID Town Hall mini-series**

- Episode 1: FAFSA Simplification, Wednesday, September 14 *COMPLETED*
- Episode 2: Professional Judgment - Tips, Tricks & Best Practices, Tuesday, December 6 (make sure you SAVE THE DATE!)
- Episode 3: Operation Fresh Start and President Biden's targeted Student Loan Forgiveness (TBD)

Once dates/times and locations have been finalized, an announcement will be sent to membership so you can all mark your calendars accordingly!



**Coming Soon**  
**Annual ISFAA Conference**  
**March 8<sup>th</sup> -10<sup>th</sup>, 2023**  
**Drury Plaza Hotel**  
**Indianapolis Carmel**



**Bits and Bytes**

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