

FEBRUARY 2023

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Conference Preview: Game On!

Greetings ISFAA! The program committee has been hard at work putting together a great conference for you all. The conference is just a few weeks away on March 8th – March 10th. The conference theme is **Game On! Ready for the Challenge. Prepared for Opportunity. Overcoming Change.**

On Wednesday, March 8th the day will start at 9am with the optional pre-conference trainings presented by the ISFAA training committee. If you are ready for a challenge, take your pick of everyone's favorite R2T4 or Cash Management. Successfully completing one of these trainings can earn you a NASFAA credential.

Starting at noon, the site committee will open the registration table. You can check in and take time to visit the vendor booths and talk with colleagues. You will also want to be prepared for the opportunity to bid on the various Pat Wilson Scholarship silent auction items and put in for your chance to win on the 10 times envelope drawing. Be sure to bring cash!

The conference will officially begin at 1pm with ISFAA's very own president-elect, Alex DeLonis, kicking off the



conference with everything you wanted to know about FAFSA simplification. Say goodbye to EFC and hello to SAI. We need all the information we can gather for overcoming this change. We will also hear an update from NASFAA chair, Helen Faith, followed by breakout sessions for you to choose from. The day will end with our president, Lisa Bridgewater, at the ISFAA President's Reception. You'll want to stick around for some hors d'oeuvres, drinks, games and good conversation!

Thursday kicks off with our keynote speaker, Charity Hurst, Executive Director of Youth Empowered Indy, who will be talking with us about cultivating young minds through unconventional learning opportunities. We will offer several quality breakout sessions, from diversity to leadership, and even mental health, just to name a few. Lisa

CONFERENCE PREVIEW — CONTINUED

will lead a discussion about the ISFAA strategic plan and what that means for the future. You also won't want to miss learning from, MASFAA president, Craig Slaughter, and the President-elect of the Iowa Association of Student Financial Aid Administrators, Matt Falduto.

On Friday we will start the day with additional breakout sessions. Then the ISFAA business meeting will take place and awards will be presented. Who will win?! During lunch, we will hear the Indiana Commission for Higher Education update from Josh Garrison.

This is just an overview of the conference agenda and a few of the great sessions and presenters that we have arranged for you all. So please join us at the Drury

Plaza hotel in Carmel on March 8-10, 2023! Additional details, including registration info and the **draft** agenda can be found on the conference website www.isfaa.org/conference

We look forward to seeing you all there!

Program Committee

Holli Hunter

Chris Pine

Russell Tragesser

Deb Gossman

Heather Lisco



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Prepared for **Opportunity**
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Past President's Perspective

I want to first say thank you to all of the board members that volunteered their time this year to move our organization forward. We've held multiple meetings all throughout the year to make important decisions regarding our organization. We will be rolling out our five-year strategic plan at the conference, with measures of accountability already built in. This will ensure the organization has goals we are all working towards to continue to build on our foundation and make ISFAA even better.

Thank you to all the chairs and their committees this past year, and for all of your time. You and your committees did the hard work and continued to bring activities and event such as College Goal Sunday, Counselor Workshops, Support Staff Workshop, Trainings and town halls, and our up coming conference. Our archive is now 99% electronic thanks to the Archives committee. We've had great newsletters throughout the year with important content. And our Access, Equity, and Diversity committee has continued to impress, by creating monthly action newsletters, a resource

web page, and creating a conference ambassador's program. They have also opened doors for a few people by helping with costs for conferences. I appreciate everyone's hard work and hope you continue to be involved with ISFAA.

My goals for the organization were to be more transparent, to create a strategic plan for the organization, to ensure our history is kept and our organization is passed from one group to the next without losing information. We now have electronic means to keep our day-to-day work along with our archives to allow for information to flow from one year to the next. We've worked hard on the website this year to bring more resources and information. I feel good about what I'm leaving for the next group. And now it's time to hand the organization to the next years of leaders.

Thank you for your support this past year and for ISFAA. I had a great time figuring out how to be a president of an organization, and I hope you continue to stick with ISFAA- we have some great things on the horizon.



Lisa Bridgewater

We will be rolling out our five-year strategic plan at the conference, with measures of accountability already built in.



Save the Date!

The 2023 MASFAA Annual Conference
will be held at
The Sheraton Indianapolis Hotel
at Keystone Crossing
in Indianapolis, Indiana
from **October 22-25.**

Committee Spotlight: Access, Equity, and Diversity

ISFAA's Access, Equity, & Diversity committee has been hard at work over the last year. As a newer committee, we have had the opportunity to create something from scratch, identify issues and areas of improvement, and come up with some creative solutions to try and solve them. There is still so much that we want to accomplish, but here are a few highlights:

Monthly Actions Newsletter – You have probably been used to receiving our Monthly Actions Newsletter since May 2022. We didn't want to create something that was simply informational, but wanted to focus on something that ISFAA members could use to take action. This could be movies/documentaries to watch, books to read, museums to visit, or discussions to have. Our hope is that this newsletter prompts our membership to have meaningful conversations in their offices or at home related to diversity, equity, & inclusion.

1st Time Attendee Scholarship – The AED Committee has the opportunity to support the ISFAA 1st Time Attendee Conference Scholarship. The scholarship covers the registration fee, and hotel room for a 1st time conference attendee. We received twice as many applications this year, and the pool of candidates was very strong. We wish we could have awarded everyone, but we were very excited to award both Devin Ellis from Indiana University Northwest and Courtney Knauff from IUPUI. We are looking forward to meeting them at the conference in March!

Resources Webpage – With the help of the website committee, we were able to create an AED section of the website. This page houses our Diversity Statement, and an archive of all of our Monthly Actions Newsletters. There is also a pool of DEI resources like articles, websites, podcasts, videos, and books that our committee has reviewed that we would recommend to our membership.

Conference Ambassadors & Training – This is the 2nd year we are coordinating a Conference Ambassador effort. For 1st time attendees, or members who want more support, registrants had the opportunity to request a Conference Ambassador and connect with them in Indianapolis. We also had the pleasure of helping coordinate several interest sessions at the conference that will focus on DEI. This is in addition to the Implicit Bias session that committee member, Amanda Fishman, delivered at the Support Staff Workshop late last year.

MASFAA Leadership Symposium Scholarship – Be on the lookout for registration to open for the MASFAA Summer Institute and Leadership Symposium. The event will take place at the beautiful Osthoff Resort in Elkhart Lake, WI. This event is an excellent way to enhance your knowledge of financial aid and grow your leadership skills.

Sincerely,

Heidi Carl
Kristina Delbridge
Garnet Tipton
Kimberly Jeffers
Candice Sutliff
Monique Ware

Stan Werne
Amanda Fishman
Kimberly Thalmann
Sara Lambie
Ginny Washington
Alex DeLonis

Please visit <https://www.isfaa.org/access-equity-and-diversity-resources> to view the resources put together by the Access, Equity, and Diversity Committee.



Kroger Community Rewards:

Make a donation by simply selecting ISFAA as your charity & use your Kroger Shopper's Card (or associated phone number) at check-out.

<https://www.kroger.com/account/communityrewards/>

President's Perspective

As I sit down to write this article, the sun is shining, the birds are chirping, and neighbors are starting to come outside again. Those are all signs that spring is right around the corner, and with Spring, comes the thought of seeing everyone at our March conference. I feel energized to begin my year as president of ISFAA.

There has been so much progress within ISFAA this last year and I know it could not have been possible without our volunteers. For those of you that have donated your time and efforts to our association, THANK YOU. I would also like to take a moment and give a special thank you to Lisa. She has done a wonderful job leading our association and preparing us for the future with our strategic plan, which will be shared with membership at the conference. It is hard to see all of the planning and preparing that goes into this role, and while Lisa has made it look so easy, I know that she has been hard at work, and ISFAA is all the better because of her leadership. Thank you, Lisa.

As I think about all that I want to accomplish in the coming year, it is important to me to focus on our strengths. Our greatest strength is our volunteers. Without the members that volunteer we would not be able to accomplish all of the wonderful things that our association accomplishes, and our members look forward to every year. If you have not considered volunteering, or are new to our association, I want you to know that ISFAA welcomes you. There are a lot of great people that look forward to meeting you and working with you in the future. Being involved with ISFAA has been one of the most rewarding parts of my career

and I would love to share that experience with you. It's not too late to volunteer for the upcoming year! The volunteer form can be found on our website at <https://www.isfaa.org/volunteer>.

In December we held the president's retreat at the Drury Plaza Hotel. Our incoming board and committee chairs spent two days planning and preparing for the upcoming year. There were several new faces at the retreat, which is exciting because they bring new ideas and energy! We hope to host a lot of great events throughout the year, one of which will be the Leadership Symposium. This event might look a little different than it has in previous years, but I am confident that we will put together a strong professional development opportunity for those wishing to advance their leadership skills.

I have seen a record number of job postings on our website in the last year. This tells me there are a lot of new financial aid professionals in the state that could benefit from our time and expertise. The training committee will be planning training events for our members, which will include opportunities to earn NASFAA credentials. If you are interested in hosting a training event on your campus, please reach out to myself or the training committee for details. We would love to host training events on different campuses, to ensure access is available to all members.

Lastly, I look forward to sharing more with the membership in the coming months and seeing everyone at the conference in a few short weeks! Let's hope spring is here to stay!



Megan Watson

Our greatest strength is our volunteers. Without the members that volunteer we would not be able to accomplish all of the wonderful things that our association accomplishes, and our members look forward to every year.

Indiana's Statewide FAFSA Completion Goal

The Indiana Commission for Higher Education announced a statewide Free Application for Federal Student Aid (FAFSA) completion goal for high school seniors to improve currently low FAFSA filing rates and increase access to state, federal and institutional financial aid.

The Commission's goal is to have at least 60 percent of the high school graduating class of 2023 complete the FAFSA by the state's April 15, 2023 priority deadline. A new statewide goal of 65 percent of FAFSA completions will be set for the high school graduating class of 2024.

Filing the FAFSA is the first step toward accessing some of the \$390 million in state financial aid and billions of dollars in federal aid available to learners. According to the [National College Attainment Network \(NCAN\)](#), Indiana high school graduates left \$69 million in Pell Grants on the table in 2022 by not completing the FAFSA.

As of Feb. 14, 32 percent of current high school seniors have filed the FAFSA. Progress toward the 60 percent goal can be tracked on the Commission's interactive online dashboard which will be updated weekly at learnmoreindiana.org/fafsa-tracker.



INDIANA COMMISSION *for*
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The dashboard can be filtered by county, school and 21st Century Scholars, so counselors can track their students' progress. The high schools with the highest percentage of FAFSA completions will be recognized by the Commission this summer.

Along with [College Goal Sunday](#), assistance with the FAFSA is available:

- The U.S. Department of Education provides email and live chat assistance for FAFSA filers as well as a helpline at 1-800-4-FED-AID.
 - Hoosier families can also access free FAFSA help through INvestEd at www.investedindiana.org.
 - The Commission's eight outreach coordinators are available via phone or email. A full list of counties and associated numbers is available [here](#).
- o ¿Necesitas ayuda en español? Llame al 317-617-0358 o 317-617-0318.

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Talk to Us

Matt Nettleton

AVP Business Development
mattn@inceptia.org



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Executive Committee Member Focus

Nathan Lohr



Nathan Lohr

1. Please tell Bits and Bytes about your current position at UIndy

Since June 2021, I have been the Director of Financial Aid at the University of Indianapolis. I oversee an office of 12 full-time staff members, and our team provides customer service and administers federal, state, institutional, and outside financial aid to approximately 5,000 undergraduate and

graduate students. In my role, I also work closely with admissions, academic units, advancement, marketing/communications, institutional research, and other campus partners to better leverage financial aid as a way to support student success.

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

My first job in higher education was as an admissions representative with Harrison College (then Indiana Business College). I loved working with students, but I was too much of an introvert to spend my entire day on the phone talking with them. After a year in recruitment, a position opened up in financial aid. I had really enjoyed working with that office to help my students get through the financial aid process, and this seemed like a much better way to balance my passion for higher ed and numbers with my strong desire to be by myself at times. I started as a financial aid analyst in September 2008 and, like so many of us, quickly found myself in a career.

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

I am currently co-chair of the Website Committee. In the upcoming year, I will serve as Treasurer-Elect and co-chair of the Leadership Symposium Committee.

4. You have been involved with financial aid for 15 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?

The students that most stand out to me are the ones that come to financial aid not necessarily because they know they need help with their financial aid but simply because they know they need help. The students that aren't sure where else to turn or share something with us that they haven't shared with any other office because it just happens to come up in the conversation. The students that so many of us work with every day on dependency overrides or professional judgments or SAP appeals or sorting out how to cover a balance. Sometimes it's the ones that we can't help at all but we connect to another office on campus. We play a big role in getting students the resources that they need to be successful at school. Sometimes that help comes from Pell or Frank O'Bannon or scholarships or loans; sometimes it's simply being a friendly face that they know is there to listen to them and support them.

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

In addition to serving on various committees, I've previously served ISFAA as a Public Relations Commissioner, chair of the Financial Aid Outreach Committee, and co-chair of the Conference Program Committee. At the regional level, I'm currently Vice President of MASFAA and have also held positions in that association as Treasurer-Elect, Treasurer, and chair of the Communication and Electronic Initiatives Committee.

6. You joined ISFAA in 2009. Please share your thoughts about the organization after 15 years as a member...

My first "involvement" in ISFAA was attending the conference. I used to roll my eyes when I would hear the old people at my table say that I should get involved and that you get

out of it what you put into it. I am one of the old(er) people now, and they were right. For me, ISFAA has been a place to learn, to make connections, and to develop myself in a safe and encouraging space. I've been able to do things and be involved in projects that have allowed me to grow personally and professionally, and I've met people that have become some of my closest friends in the profession and have helped me pursue new opportunities in my career. It didn't happen overnight, but the organization has gone from being a resource for information to a group of people I rely on for guidance and support.

7. What is your favorite thing about your profession?

I love problem solving and figuring out ways to streamline, simplify, and improve processes. I really enjoy situations where you can identify a way to help one student and apply that same solution to ten or a hundred or a thousand other students. I also love compliance, but I really love finding creative ways to maintain compliance without making things more complicated than they need to be. I like when we can find a way to make the financial aid process easier for students (and, just as importantly, make things on the backend easier for us).

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

Clock hours and non-standard terms. :) At least those are my least favorite parts of every training session or NASFAA

credential. I really don't like policies and regulations that, well intentioned or not, make completing the financial aid process more challenging for students or make administering aid more complicated for our offices. On a student level, I still struggle with situations where we've exhausted every possible option and a lack of funding is a barrier to the student continuing their education.

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

For those of you that are newer in the profession: Ask questions. Make suggestions. Be engaged. Look for opportunities to do something that isn't part of your official job description. Be positive. As a director, I may not always know everything that the members of my team are doing but these are the type of actions that I do notice and that stand out to me.

For those of you that are newer to ISFAA: take it from an old(er) person - get involved because you'll get out of this organization what you put into it. There are opportunities to grow and develop both personally and professionally. And if you're introverted (like me) or not sure where to start (like I was), reach out to me or any other member of the Executive Committee and we'll help you get connected.

ISFAA.org Website Tip

There's still time to register for the upcoming ISFAA Conference.

Simply go to <https://www.isfaa.org/> and select "Conference" under "Conferences and Training". On that page you'll see a link to register. From there, you'll login and complete the online registration form.

**See you March 8th – 10th
at the Drury Inn in Carmel!**

Conferences and Training

Training

Conference

Leadership Symposium

State Aid & ScholarTrack

Support Staff Workshops

From the Desk of a Delegate-At-Large...

by Holli Hunter



Holli Hunter

Hello ISFAA! I was recently elected as a Delegate at Large. I wanted to take this opportunity to introduce myself and give a little more background on my experience. I came to financial aid by happenstance, probably like many of you. I was working in the high stress, low pay field of social services. I just needed a change and I needed something with consistent hours that would

allow me to spend time with my young family. In 2006, I joined the financial aid office at Indiana University. I started off in customer service, then work study and finally verification. I was pretty much hooked the first time something wasn't working properly, and we had to investigate what happened and how to fix it. I've always been somewhat of a "detective".

In 2007, I took a position with Ivy Tech Community College at their Lawrence campus helping students navigate the financial aid process and answering questions throughout the semester. Later, I moved on to processing documents and awarding scholarships. I have since moved to the systems office of Ivy Tech and learning about the behind the scenes processes that I wasn't privy to in my previous

positions. For me, financial aid has been an ever-changing world and keeps you on your toes. Never a dull moment!

I started volunteering with ISFAA via the Pat Wilson Scholarship Committee. I found the work fun and rewarding. I then found myself volunteering on other committees like Site Committee and Make It Real. In later years, I began chairing or co-chairing committees, such as the Conference Program Committee and Archives. I also ran for board secretary and to my surprise was elected. I find this work very rewarding and for me it is somewhat of a creative outlet. I encourage everyone to volunteer on a committee and see for yourself!

For the next 2 years, I will be on the ISFAA board as a Delegate at Large. So, what does a Delegate at Large do? This position is a liaison to the membership for issues or tasks that need to be brought to the Executive board. Therefore, I'm here to represent you and your concerns. I can bring to the board any issues that the membership would like addressed. Have a burning question or suggestion for the board, I can bring it to their attention for response.

I have really enjoyed my time spent in ISFAA and the various committees. I credit my co-workers and supervisors (past and present) with encouraging me to be involved in the association. It truly has been rewarding work and I look forward to my upcoming work as a Delegate at Large.



Ready for the **Challenge**
Prepared for **Opportunity**
Overcoming **Change**

2023 ISFAA Annual Conference March 8th - 10th, 2023

ISFAA invites you to join for the annual conference in-person on March 8th - 10th, 2023. The conference will be held at the Drury Inn in Carmel, IN. The cost of the conference for ISFAA members is \$175.00.

See: <https://isfaa.memberclicks.net/conference> for more details.

Upcoming Training Opportunities

Registration is open for the pre-conference NASFAA Credential training sessions. The pre-conference training sessions will be held on Wednesday, March 8th from 9am-noon (Eastern Time).

Note: these training sessions are being held concurrently so registrants won't be able to attend both training sessions.

Cash Management training session:

<https://www.surveymonkey.com/r/CashManagement>

R2T4 training session:

<https://www.surveymonkey.com/r/R2T4>

Registration will close Friday, March 3rd at Noon. Registrants will be sent training materials, training location specifics, etc. by 2pm that afternoon. Remember, to gain access to the NASFAA Credential exam for FREE, participants must attend the training sessions in person.

Questions? Feel free to contact ISFAA Training Committee Co-chairs:

Vinny Vincent-Dunn (vincentdunn@reach.edu)

Nicole Trice (ntrice9@ivytech.edu)

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Comings and Goings

...and other tidbits of association news

Sue Allmon

Promotions

Sue Allmon, ProEducation Solutions, LLC received a promotion as of January 1, 2023. She is now the Director of Operations for the company.

The University of Southern Indiana has promoted **Joanna Riney** to the position of Director of the Student Financial Assistance office. She was formerly their Associate Director. Her position as the Director was effective Jan. 10, 2023.

Good News Announcements

Stan Werne, Director of Financial Aid, Vincennes University shares that the Vincennes University Student Financial Services staff are happy to be moving from their temporary quarters back to the refurbished Administration Building. Not the least of the benefits: real temperature control in each office.

Julie Wonderlin, Financial Aid Director, Ivy Tech Community College, Terre Haute expanded her family by 1! Daughter Paige Wonderlin (Morris) married Jacob Morris on November 13, 2022. Julie writes: *"I began my first job in financial aid with Ivy Tech when Paige was 10 months old in 1999. My how time flies! We are very happy to have Jacob join our family."*



Bits and Bytes

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