

Aug/Sept/Oct  
2006



# Newsletter

A publication of the Oregon Association of Student Financial Aid Administrators, a not-for-profit membership organization

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## President's letter

Greetings! I hope you are as excited as I am to see the second issue of our OASFAA Newsletter. As I mentioned in the last issue, one of my goals as President is to increase communication among the membership. With the President's Letter in February, half of our quarterly newsletters compiled and sent, increased use of the list-serve for legislative updates (thanks to Susan Degen), and more postings to the OASFAA calendar, I think we are well on our way to reaching that goal.



The last Executive Council meeting was held July 19th in Eugene. I am pleased to announce that OASFAA has donated \$1,000 to the Peggy K. Nitsos Memorial Scholarship fund (see the letter on page 16). As most of you know, Peggy served students for over twenty years and she was an active OASFAA member. She received our Unsung Hero Award in 2005. As a colleague and neighbor, I miss Peggy and her guidance. I can think of no better way to honor her memory than by supporting this endeavor.

The Executive Council had a sneak preview of the sessions for the Support Staff Workshop in November. The topics are terrific! Thanks to Rob Clarke and Frankie Everett for their creativity.

Our last newsletter included counterpoints for a change in venue for the Annual Conference. Based on the research and recommendations of the Site Selection Committee, the Executive Council voted and approved contracting with the Eugene Hilton for 2008 (see Judy Saling's piece on page 7). Change is hard, but I am excited about the possibilities a larger venue and new site have to offer. Rest assured, we are requesting a proposal from Salishan for 2009.

The Executive Council wants you to know what issues we are discussing and how your money is being spent. For your review, the OASFAA Executive Council meeting minutes are posted online at [www.oasfaaonline.org](http://www.oasfaaonline.org) and the OASFAA budget will be available online soon.

It was great to see some of you at NASFAA in July. As the summer draws to an end, I hope you have had time to enjoy Oregon's beautiful lakes, rivers, trails and other wonders with your family and friends. If you haven't, drop that FISAP and go outside!

Tracey

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## Editorial Policy

Opinions expressed in this newsletter are those of the authors and not necessarily of OASFAA, its members, or the institutions represented by the authors.

OASFAA welcomes all views and invites members to submit for publication articles, essays, photographs, or information of general interest to all members. Submissions should be brief and may be edited. It may not be possible to publish all articles submitted. Email items for publication to: shogren@up.edu.

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# Letter from the Editor

by Susan Shogren, University of Portland

The focus of this issue of the OASFAA Newsletter is outreach and college access. While it's a very busy time of year for us all, I hope you will take a few minutes to read through the articles and opinions submitted by your colleagues. In this issue, you will meet a member of OASFAA whose personal mission is to help disadvantaged students get a college education. I especially encourage you to consider Sue Gano's article and reflect on her words of advice.

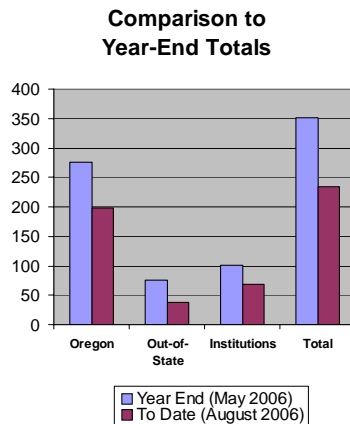
The next issue is scheduled to be published during November. We are especially interested in articles and essays related to completing FAFSA's, searching for private scholarships, OASFAA elections, and professional development. Be sure to send in your submissions by October 31.

By the way, Sue Gano's article arrived just as I was headed out on vacation to the mid-west, which involved air travel. When the flight attendant finished explaining how to use an oxygen mask, he reminded us, "Take care of yourself so you can help those around you." This simple statement resonated with me. I believe Financial Aid Professionals – perhaps more than most – need to heed this advice. We face so many pressures from all sides: changing regulations, burdensome policies, challenging administrators, huge workloads, limited staffing, and anxious students and parents. Handling it all gracefully is an art... and an endurance test!

Please remember to take care of yourself first, so that you continue to have something to give to others. They need you to be there for them.

## OASFAA Facts

<b>Membership:</b>	
Total	235
Oregon	198
Out-of-State	37
Institutions represented	69
Voting members	
Affiliate	167
Other	66
Other	2
Female	
Male	182
Not specified	45
Not specified	8



## New Members of OASFAA

The following current members joined OASFAA during 2006:

**Patti Ball**, Linn-Benton Community College  
**Carolina Bass**, Mt Hood Community College  
**Melanie Bowman**, Eastern Oregon University  
**Jolene Burke**, Educational Credit Management  
**Paula Crow**, Educational Credit Management  
**Billie Hyde**, KeyBank USA Education Resources  
**Kent Ikeda**, Wells Fargo EFS  
**Darcie Iven**, Clackamas Community College  
**Dennis Johnson**, OSAC  
**Kerry Karner**, Art Institute of Portland  
**Sarah Loepker**, Portland Community College  
**Dotty Morlan**, Everest College  
**Carolyn Orlando**, Clackamas Community College  
**Wes Reynolds**, Stanford Alumni Association  
**Joyce Staats**, George Fox University  
**Sandra Tello**, Linfield College  
**Carlos Villarroel**, Art Institute of Portland

## Welcome!

Be sure to read the Member Profile of OASFAA member, Gerardo Ochoa (page 7). Watch for profiles of other new and current members in the future.

## *EDAC Scholarship Available*

*by Luhui Whitebear, Confederated Tribes of Grande Ronde*

The deadline to apply for the Ethnic Diversity Action Committee (EDAC) Scholarships to attend the 2006 **Jerry R. Sims Management & Leadership Institute** is quickly approaching. Scholarships are open to current WASFAA members only. The scholarship will cover the cost of at least your registration fees, and possibly more.

The deadline to apply is 60 days prior the event you wish to attend. The deadline for the 2006 EDAC Jerry R. Sims Management & Leadership Institute Scholarship is **August 25<sup>th</sup>**. Don't miss your opportunity! Apply today: [www.wasfaa.org/docs/forms/2006Scholarship\\_app.html](http://www.wasfaa.org/docs/forms/2006Scholarship_app.html)

Please pass this information on to anyone that would benefit from this opportunity.

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## *WASFAA Scholarship Available*

*by Theresa Bosworth, Blue Mountain Community College*

WASFAA is once again sponsoring 1 state scholarship for each state in the region to support one of its members in attending WASFAA's Jerry Sims Management & Leadership Institute. The training will be held at The Resort in scenic Coeur d'Alene, Idaho on October 25-27. Registration will be available online in late August. Only 42 slots are available so register and apply early! For more information about this training or to obtain a Scholarship Application, go to WASFAA's website at: [www.wasfaa.org](http://www.wasfaa.org)

The scholarship will cover the cost of the membership registration for this event only. The registration fee includes the hotel and shuttle bus. The value of this scholarship is \$630. The deadline to apply is **August 25, 2006**.

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## *OASFAA Members on the Move*

**Peg Blake** was appointed interim Director of Financial Aid at Southern Oregon University.

**Jim Murphy**, who served Cascade College as Director of Financial Aid since 2004, was recently named Director of Enrollment Management.

**Kate Petersen** was named Assistant Provost for Enrollment Management at Oregon State University.

**Dan Preston** was named Dean of Enrollment Management at Linfield College.

**Emilio Vejil** was named Director of Financial Aid and Scholarships at Oregon State University.

**Crisanne Werner** was promoted to Director of Financial Aid at Linfield College.

## *Conference Moves to Eugene*

*by Judy Saling, University of Oregon*

Your president, Tracey Lehman, has just signed the contract with the Eugene Hilton for our OASFAA Conference to be held at the Eugene Hilton in February, 2008. The Hilton is offering us great facilities with lots of elbow room for break out sessions and vendor display. In addition, their staff is pleased and excited that OASFAA has chosen them as the first site in breaking with the long tradition of having the annual conference at Salishan Lodge on the coast. The Hilton offers amenities that you would expect in a fine hotel. Attendees will especially enjoy their practice of continually refurbishing rooms with comfortable beds and fine linens. Covered parking and free airport shuttle from an airport only 15 minutes door to door are some nice features that our guests and speakers will appreciate, also.

Next to the hotel is the Hult Center for the Performing Arts that offers performances of dance, drama, and music. Within walking distance are many art galleries, exceptional restaurants, and interesting shopping areas. The near by 5<sup>th</sup> Street Market is undergoing an extensive facelift that promises to provide new and updated shopping options while maintaining the charm of the original building and courtyard. Several music venues such as the Shedd Institute provide an eclectic assortment of entertainment opportunities as well. Those wishing to get outdoors for walking, running, or biking, will find that Eugene has miles and miles of paths along the Willamette River that can be reached just a couple of blocks from the Hilton.

The newly formed Site Selection Committee is enthusiastic about the variety of events that can be offered at this new conference site, as well as the opportunity for more members to participate in this wonderful training and networking event because of the convenience of the location.

Remind yourself to mark your calendar for this conference, and begin thinking of how you can share your area of the state as a conference site.

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## *On the OASFAA Calendar*

Oct 19	OASFAA Executive Board Meeting
Oct 25-27	WASFAA Management/Leadership Institute
Oct 31	OASFAA Newsletter submission deadline
Nov 5-6	Portland National College Fair
Nov 15	OASFAA Support Staff Workshop
Nov 28-	Federal Student Aid Conference
Dec 1	(formerly Electronic Access Conference)
Nov 30	OASFAA Newsletter submission deadline
Dec 6	OASFAA Executive Board Meeting
Jan 20	College Goal Oregon
Jan 28-30	OASFAA Annual Conference

## Federal Issues: HERA Regulations Posted

by Susan Degen, OSAC

ED recently published two sets of interim final regulations based on changes initiated by HERA (Higher Education Reconciliation Act of 2005). The first set of interim final regulations for the new Academic Competitiveness Grants (ACGs), National SMART Grants, and other Title IV programs were posted in the *Federal Register* on July 3, with comments due by August 17. The rules became effective August 2, for the 2006-07 award year, but may be amended or modified for the 2007-08 award year, based on comments received.

A second set of interim final regulations that focused on changes in institutional eligibility, general provisions, and the Perkins, FFELP, and Direct loan programs was posted in the *Federal Register* on August 10, with comments due September 8. These interim final regulations are effective September 8, 2006.

Check websites for NASFAA, WASFAA, and other organizations for excellent comments on the regulations and summaries of key issues. ED has posted numerous Dear Colleague Letters and other documents providing further HERA guidance on the IFAP website.

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## State Issues in Oregon

by Susan Degen, OSAC

Below are highlights from the OSAC Update at last week's OASFAA Summer Drive-in Workshop, presented by Dennis Johnson and Susan Degen. Please also refer to a separate Oregon Opportunity Grant update (see page 5).

**Troops to Teachers** — This new program helps returned military personnel prepare for teaching careers. Maximum awards are \$5,000. Eligible students must be enrolled at a public institution. OSAC coordinates the program with Oregon Departments of Education, Veterans Administration, and public universities. For more information and a copy of the application form, visit:

[www.getcollegefunds.org/troops\\_to\\_teachers.html](http://www.getcollegefunds.org/troops_to_teachers.html).

**ASPIRE** — Nearly 1,000 community volunteers will be in 88 high schools in 2006-07. In 2005-06, more than 6,000 students received mentoring and other services. OSAC is currently conducting interviews for a new Central Region Supervisor, a position funded by The Ford Family Foundation and the Oregon Community Foundation.

**OFAX Update** — OSAC charges modest fees to recover costs associated with this service, which are paid by each segment's administrative offices (OUS and CCWD), not by individual institutions. OHSU Nursing Services will begin using OFAX this fall. There are currently 40 dual enrollment agreements, and OUS institutions and community colleges expect dramatic expansion of OFAX usage.

**Scholarship Services** — The 2007-08 scholarship application will be available in early October! OSAC will send samples of the paper application to all institutions and ask institutions to order the number of applications they expect to use via email. A streamlined electronic application process will offer more online options, including short-answer questions to replace the traditional essays, pre-populated applications for returning students, and a PIN-secured site where students can check their application status.

## ED Guidance on HERA Programs

March	GEN-06-02	Enactment of the Higher Education Reconciliation Act of 2005 ("the HERA"), Pub. L. 109-171 (Rev. March 14, 2006)
March	GEN-06-03	Correction to Dear Colleague Letter GEN-06-02, FP-06-01
April	GEN-06-04	Academic Competitiveness Grant and National Science and Mathematics Access to Retain Talent (SMART) Grant Programs
May	GEN-06-06	National SMART Grant – Announcement of Eligible Majors
May	GEN-06-08	Additional Implementation Guidance – Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (National SMART Grant) Programs
June	GEN-06-10	Implementing Provisions of the HERA for the 2006-2007 Award Year
June	CB-6-10	Implementation of the Revised Federal Perkins Loan Program Master Promissory Note

source: U.S. Dept. of Education IFAP  
[www.ifap.ed.gov](http://www.ifap.ed.gov)

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## OSAC's Legislative Priorities (2007-09)

by Susan Degen, OSAC

- Make ASPIRE available to all Oregon high schools, expanding from 88 to more than 300 possible sites.
- Expand OOG eligibility through the Shared Responsibility Model, a joint proposal with the Access and Affordability Working Group, that would extend funding from present level of 24,300 recipients to more than 40,000 recipients
- Extend OFAX to all OUS campuses and community colleges
- Add a student consumerism function to Office of Degree Authorization's activities.

# *Oregon Opportunity Grant Update*

*by Susan Degen, OSAC*

Last year (2005-06), 24,300 students received more than \$29.3 million in OOG funds. We expect even more for 2006-07. NO CUTOFF DATES! Maximum awards will be \$1,398 for community college students and \$1,674 for OUS students. Maximum awards at independent institutions will average \$3,300.

For the first time ever, awards will be available to students enrolled at least half time (6 to 11 credit-hours per term). Award amounts will be equal to 50% of the grant amount for full-time enrollment.

## ***OOG and Professional Judgment***

"Request for Reconsideration" ended December 31, 2005, and Pell eligibility is now a permanent OOG requirement. Starting Fall 2006, OSAC will accept professional judgment (PJ) requests that affect students' Pell Grant eligibility. Students must also meet all other OOG eligibility criteria. A PJ request form and procedures will be available soon on the OSAC website. The form asks for several key data elements: student's name, SSN, date of birth, PJ reason code, FAFSA transaction number and date. Institutions may submit PJ requests throughout the academic year, but OSAC will not "lock in" and process a specific PJ until after the requesting institution reports the student as enrolled. Once OSAC locks in a PJ transaction, it prevents all subsequent FAFSA transactions from being processed. NOTE: A locked PJ transaction may affect OOG eligibility for mid-year transfer students.

## ***OOG Participation Agreements***

Most OOG participation agreements were signed in 1988 and have not been updated to reflect current policies and rules. The Oregon Attorney General's Office just completed a final review of the revised agreement. The new agreements require signatures of an institution's Financial Aid Director and President, as well as OSAC's Executive Director. The agreements are subject to renewal every 4 years and whenever an institution experiences a change in key staff, such as the institution's FA Director or President. New agreement forms will be mailed to institutions in September.

## ***OOG Handbook***

The handbook will be available online first week in September. It will reflect all recent changes in rules, policies, and procedures and will be updated at least once each biennium. New appendices will include copies of award tables, eligibility tables, rules, forms, statutes, statistics, performance measures, and other program documents.

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# *Good-bye to Financial Aid*

*by Sue Gano, MSW*

Today, I said goodbye to financial aid. I know, what you're thinking: how many times is she going to leave financial aid and be lured back in to the fold? Let me tell you, I have been through the revolving door of student aid more times than I care to count. This time is different in that I received my Masters in Social Work on June 17, 2006, and I am ready at the tender age of 45 to start my new career.

I have loved working in financial aid offices, especially the past few years when I had the privilege of working for so many of you as a "temp." My first day in a financial aid office was in January of 1979. Hired on by Rod Boettcher as a work-study student in Mt. Hood Community College's financial aid office, I arrived the first day winter term ready to do whatever. The line at the counter went out the door. I was told to have a seat in the break room and someone would be with me shortly. Two and a half hours later I had to leave for class. What a wild place, I thought to myself. Still I came back the next day and actually got to file. I think they were surprised to see me. A sure sign that someone had caught the "financial aid bug."

There is something so exciting in seeing a person obtain such a life changing goal as a college degree and know that you were part of the "team" that made that happen for that

student. Even as I worked these past two years at my internships, I found that my financial aid experience was helpful to the people I worked with.

My first year was in a residential drug and alcohol treatment center for women and their children. In between group and individual counseling to help young women through their initial period of recovery and teaching parenting skills in order to break multi-generational patterns, I was helping clients fill out the FAFSAs, handing out phone numbers to clear up the defaulted loans that had been haunting them, and explaining the mystical process of financial aid. Many of these women are your students now, working toward a new life.

My second year internship was at the student counseling center at Portland State University. My work with these students is what I want to leave you with. Most of the students/clients that I saw had a high level of anxiety about financial aid. Many of them were confused by the process, frightened by the fact that money stood between them and their goal of higher education and worried to the point that they were physically affected. Lack of sleep, upset stomachs, fearfulness and a sense of feeling that it is all out of their control, were the symptoms that

*continued on page 15*

# VP Report: Financial Aid at a Community College

by Melinda Dunnick, Lane Community College



In the last issue, the names of scholarship recipients were reported, but at least one was missed: mine!

I had the honor of receiving an OASFAA scholarship to attend the WASFAA Conference in Reno. Thank you, Selection Committee, I really appreciated the financial assistance. Without it, I would not have been able to attend.

Some of you may remember that I slipped while “treasure hunting” at our annual conference and broke my ankle. Thank goodness, it was healed enough to be out of the stylish walking boot and back into real shoes before I headed to Reno.

It was my first WASFAA Conference, and as others reported, I thought the sessions were great. It is always exciting to hear a new and different perspective. I don’t know how they came up with so many sessions. It made it difficult to make choices. My favorite (and popular with many others as well, as it was standing-room-only) was Linda Burkhardt on SAP. I review most of the SAP appeals at Lane Community College, so I appreciated the Department of Education’s guidance.

Returning to work brought the end of term R2T4 calculations (for winter) and more SAP appeals. Holding the conference later in the spring sure would have made returning to work less hectic. I realize not all schools are term-based, but it seems as though both term- and semester-based schedules could be considered when selecting dates for the regional conference. And then there was the switch to daylight savings time the opening day of the conference.....I hope other attendees got more sleep than I did!

Spring term is always busiest at Lane Community College. We wrap up the current year and prepare for the new aid year. As an “open-door” college, we award aid year round. There is no application deadline, other than

meeting federal requirements. We always dedicate one staff member to finish out the current year, while everyone else moves on to the new.

Our policy is to verify first, then award. Since we award campus-based funds on a first-come-first-served basis, every effort is made to review all early applicant files (those received by the federal processor by Feb. 15) before running the packaging program the first time for the new aid year.

Converting to Banner three years ago has allowed us to automate many processes. Students sign their Title IV Funds Release and accept loans online. We have links to online entrance counseling and MPN’s. Banner is programmed to automatically post requirements and holds for many critical items based upon ISIR comment codes and/or

*“We took advantage of technology to ease workload...”*

internal information. Banner also satisfies many of these requirements automatically. Most non-verified students are packaged with no manual entries. What a dramatic change from our previous system, when every student’s file was reviewed (even the non-verified ones) and all data was manually entered. Our automated processes enabled us to send out approximately 3000 award notifications before Memorial Day weekend—a record that would not be possible without automation. We continue to award another 200–250 students bi-weekly.

Another time saver was the implementation of document imaging last year. Student Financial Services used to employ three student workers and one part time worker (totaling over 60 hours per week) to make student files, file them in the file room, file documents as they were received, pull the files for

review after all required documents were received, file them again after the review, etc. We were handling each file a minimum of four times. We now utilize only one student worker for about 3 hours per week and can’t always keep her busy. Scanning and indexing duties rotate among all staff on a daily basis. When the last required document is scanned and indexed, a review hold is added. A review hold report is printed weekly and the virtual files are reviewed from the list. The reviewer performs verification and makes sure all the “I”s are dotted and “T”s are crossed. If the EFC changes, another hold is added to ensure a student does not get paid until we receive a correct and eligible ISIR.

Perhaps you’ve heard that Lane Community College recently eliminated jobs in an effort to balance our budget. Student Financial Services lost two positions. One of them was our Federal Work-Study coordinator. Of course, the duties related to that position still exist and were assigned to other already overworked staff. We again took advantage of technology to ease workload and introduced an online system that allows students to accept 2006-2007 federal work-study awards, search and apply for jobs, and electronically sign our institutional confidentiality agreement. Because we no longer have a work-study office to handle the hiring details, this process makes it easier for departments to employ student workers.

Our Financial Aid Office is not involved in the selection of scholarship recipients. A common application for all institutional scholarships is available from our Career and Employment Services department. College staff and community members read and score the applications, and the LCC Foundation Office selects the recipients. The exception is when one of our staff is lucky enough to win a scholarship at a conference. In that case, we select the recipient personally. We really are doing more with less!

## **OASFAA Member: Gerardo Ochoa**

*A Financial Aid Counselor at Linfield College, Portland Campus, Gerardo is primarily responsible for providing scholarship outreach and support to students. We asked him our "20 Questions" and here's how Gerardo responded.*

*How long have you been in Financial Aid?*  
2 years.

*How did you get started in Financial Aid?*  
Working on a federal grant to recruit and retain bilingual nurses.

*What has your involvement been with OASFAA so far?*  
I've participated in several of the trainings, attended annual conferences, and was a mentor at the conference.

*What is the most rewarding part of your job?*  
Helping students secure scholarship money and get their education paid for.

*Which case/student will you be most likely to remember for the rest of your life?*  
An undocumented student who won \$129,000 in scholarships after applying to 29 scholarships. When you have your back against the wall, you go the extra mile to achieve your dreams and goals. He did that.

*What is the most difficult aspect of your job?*  
Denying undocumented students access to financial aid because under federal regulations they don't qualify, even though they've been here their entire lives. How do you tell these students there's money available for certain students but not for you?

*How do you cope with stress at work?*  
I get out of the office and take a 5-minute walk around campus, or I read a little of one of my books. But mostly, I do my job in a timely manner to avoid pile ups. I believe most job-related stress can be avoided.

*Who had the greatest influence on your career?*  
June McBride. She is an inspirational person and pushes everyone to reach their potential. She has a big heart and dedicates her life's work to the serving people.

*What is/was your favorite volunteer experience?*  
Mentoring middle school kids in the after school program in Eugene called GANAS, or in English, "Desire." It is very rewarding to mentor youth and watch them grow over time, and help to and mold them into the people they strive to become.



*What do you do when you are not working?*  
I'm a family man, I'm always with my family.

*What do you like most about living in Oregon?*  
What's not to like? I love all the green everywhere. I often take Oregon for granted until I travel outside of Oregon, then I realize that Oregon is one of the most beautiful places to live. I love the lakes, rivers, mountains, and everything that the natural surroundings allow us to do for fun.

*What is the most unusual place that you have traveled?*  
Uruapan, Mexico. I visited a park called "La Rodilla del Diablo" (the devil's knee) where it is believed that the devil himself left a huge imprint

on a rock after kneeling on it. The park is amazing and has a lot of history.

*What is your favorite restaurant?*  
Don't have one. I try to eat at home and practice the things I preach to my students. It is cheaper to eat at home than to eat out, we all know that, and healthier too.

*What was the last book you read?*  
"Who Moved My Cheese." An old one but a good one.

*Who is your personal hero?*  
My dad. He had to drop out of school when he was in 6<sup>th</sup> grade, but he valued education so much and his determination to finish at least elementary school in Mexico was so strong that he returned to the same classroom with the same teacher at the age of 19. Can you imagine a 19-year old being in the same classroom as other 11-year olds? I respect the man for his accomplishments in spite of all his obstacles. I don't know that I could have done what he did.

*Pepsi or Coke drinker?*  
Pepsi, although I'm trying to kick the habit.

*DL or FFELP?*  
FFELP

*If you could change anything in our industry, what would it be?*  
Allow undocumented students who have been in the U.S. public schools for more than 5 years, who have financial need and meet all other requirements, access to financial aid.

*Do you have any advice for your fellow financial aid administrators?*  
It is easier for students to take loans to pay for school, just like it is easier for us to process loans for students. We need to be motivators for entering college students and help them to receive more scholarships. Information without motivation does not work when talking to students about scholarships. Outreach + Information + Motivation = Success.

*If you were not in financial aid, what would you be doing now?*  
Counseling Latino high school students.

# Why Are Students With Financial Need Not Completing the FAFSA?

by Ralph Kosanovich, Sallie Mae Pacific Northwest Region Sales

While the general number of students filling out the Free Application for Federal Student Aid (FAFSA) has risen in recent years, there has not been a proportional rise in the number of financially needy students completing the FAFSA.

According to Department of Education figures, the absolute number of FAFSA applications increased by approximately 3 million during the four-year period from 1999-2000 to 2003-2004. Yet the number of low- to moderate-income applications increased by a scant 100,000 applications during this period.

Low- and moderate-income groups constitute a relatively small portion of all students who did not apply for federal aid (24%), yet this still represents almost 2 million students. A report by the American Council on Education (“Missed Opportunities Revisited: New Information on Students Who Do Not Apply for Financial Aid”) provides some additional data. The report indicates that community colleges—which now enroll more than 40% of all undergraduates—constitute the majority of students who do not apply for aid. Those students in the two lowest-income brackets represented 13% of all non-applicants, amounting to almost 1 million students.

This trend begs the question: why are those most in need of financial assistance less likely to apply for funding? Data from the Department of Education may help to explain why so many students are not taking advantage of financial assistance.

One possible reason is that students may have received aid from a source that did not require completion of the FAFSA. Almost 30% of students who did not file a FAFSA in 2003-2004 received financial assistance from a source that did not require the application. The most common type of aid received by students who did not complete the FAFSA was employer assistance (see table for a breakdown of other sources).

**Percentage of Undergraduates Who Did Not File a FAFSA for 2003–04 but Received Aid, and Average Total Amount Received \***

	Employer Aid	Private Grants and Loans	Institutional Non-Need Based Grants	Aid From Any Source	Average Amount Received
All Undergraduates	13.3 %	5.4 %	5.6 %	29.0%	\$2,954

\*Source: U.S. Department of Education, 2004

Regardless of the reason, the fact remains that thousands of undergraduates are not taking advantage of federal money allocated to support their higher education careers. More initiatives which reach out into communities to provide badly needed information on financial aid resources are needed.

Students seeking help completing the FAFSA have a number of resources available to them. They can be directed to the U.S. Department of Education’s online FAFSA tutorial, an introductory publication for students that provides instructions on how to complete the FAFSA’s online or paper version. “Completing the FAFSA, 2006-2007” is for the award year that runs from July 1, 2006 to June 30, 2007, and is available online in both [English](#) and [Spanish](#).

Students who have questions or require additional information on student financial assistance may also contact their high school guidance counselor if currently in high school, or the financial aid administrator at the postsecondary school they plan to attend.

# FAFSA Changes

by Sue Shogren, University of Portland

As part of her Federal Update at the Summer Drive-In on August 9, 2006, Marianna Deeken shared information about changes in the 2007-08 FAFSA delivery system:

- This year’s color is yellow... or as Marianna described it, “very, very yellow”
- Questions 27 and 28 removed (interest in loans or work-study) to make room for new questions required by HERA
- Question 98 (enrollment status) moved to page one to follow “grade level in college”
- Number of college choices reduced from 6 to 4 to make room for new questions required by HERA; this does not affect FOTW, which will continue to allow up to 6 choices
- FOTW will implement auto-zero EFC and SNT skip logic enhancements for new means-tested federal benefits program(s) questions
- FOTW will require applicants to entire SSN twice to verify accuracy
- Paper SAR messages simplified and printed in priority order based on impact on aid eligibility
- Paper SAR will display DRN at top right, which mirrors eSAR
- ISIR field numbers are slightly different from FAFSA and SAR: 4 colleges on paper documents; 6 colleges on ISIR and eSAR

Also, when communicating via email with FAFSA applicants, the return address will be ‘FederalStudentAid’ and the subject line will be changed to ‘FAFSA Results – 2007-08 SAR’ to avoid official emails from being misinterpreted as spam.

On August 16, 2006, the US Department of Education made a second draft of the 2007-08 FAFSA available for comment. Look online under ‘Publications’ at:

<http://www.ifap.ed.gov>



## *OASFAA Volunteers Inform Students*

*by Julia Reisinger, Portland Community College*

To kick off the college admissions and financial aid application season, the Portland National College Fair returns to the Oregon Convention Center on Sunday and Monday, November 5<sup>th</sup> & 6<sup>th</sup>. The Fair hosts over 250 colleges and universities from across the country. Admissions personnel and high school counselors give advice on where to look and how to apply for admission.

This event includes presentations on how to apply for financial aid, as well as how to search for and apply for scholarships. A table is set up in the middle of the College Fair where students can stop to ask specific questions on how to apply for financial aid, when to apply, and what types of aid are available.

The College Fair has been a traditional way for juniors and seniors to begin to learn how to apply for financial aid at the same time they look for colleges. Over the years, many OASFAA members have volunteered to staff the financial aid table and give presentations on the financial aid process to large groups of students and their parents.

Students and parents tend to get their introductory financial aid information from the Fair. They get even more specific information at "Financial Aid Nights" offered by local high schools, usually held during November and December.

Sponsored in part by OASFAA, the "OPB Night" televised in December gives students and parents another opportunity to learn more about the process.

Next January, OASFAA will help to sponsor "College Goal Oregon." Scheduled to take place on Saturday, January 20, 2007, this event will connect volunteers with students throughout the state to help them fill out their FAFSA applications.

From start of the process at the College Fair in November to helping students complete the FAFSA during January, there are many excellent opportunities for OASFAA members to volunteer and get involved in helping students through the process.

*Anyone interested in volunteering for this year's Portland National College Fair should contact Julia Reisinger ([jreising@pcc.edu](mailto:jreising@pcc.edu)) at Portland Community College.*

## *OASFAA Elections*

*by Tracey Lehman, OIT*

Theresa Bosworth, President-elect of OASFAA, is looking for members to run for office for 2007. Elections will take place in December. Transfer of office takes place at the Annual Conference at the end of January.

Contact Theresa at:  
[TBosworth@bluecc.edu](mailto:TBosworth@bluecc.edu)

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## *OSAC Scholarships*

*by Vicki Merkel, OSAC*

The Oregon Student Assistance Commission's 2007-08 Scholarship Application will be available two months earlier than in prior years. OSAC expects the publication will be printed in early October.

Distribution processes are also changing. Schools will receive a sample shipment and order form in mid-October. The sample shipment of scholarship applications will also include publications about financial aid made available by the Education Credit Management Corporation: a general-information booklet and an Oregon-specific booklet called "Oregon Opportunities." Schools will be able to order one or both publications.

More information will be posted on the OSAC website in October.

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## *My Experience at the WASFAA Summer Institute*

*by Breana Sylwester, University of Portland*

This past June, I had the privilege of attending the Sister Dale Brown WASFAA Summer Institute at UCLA. If you are fairly new to financial aid or would like the opportunity to see financial aid come full-circle, I highly recommend attending this conference next year.

The conference covered everything from how to complete the FAFSA to federal updates by Marianna Deeken regarding the new ACG and SMART grants. We were guided through EFC hand calculations and received exposure in evaluating profession judgment situations. Yes, all the fun aspects of financial aid!

It was good to have a refresher course on topics I already felt comfortable with so that I can better advise my students. The experience went beyond the basics of financial aid, however, providing me with the opportunity to get to know my colleagues and build relationships with people that will help me succeed in financial aid.

Thank you to everyone on the Summer Institute committee for providing such a great learning experience!

# Outreach in Oregon

by Jennifer Satalino, NELA Center for Student Success

“Outreach” has become a buzz-word lately. NASFAA’s President, Dave Gelinas, made it a focus of his year in office. Schools and vendors talk about their outreach efforts all the time. But what do we mean by “outreach,” how did it suddenly become a fashionable topic, and how can you, Johnny and Jenny Q. Public, OASFAA member extraordinaire, get involved?

Outreach is nothing new to OASFAA. Our members have been quietly reaching out to young students for decades. Back in the early 1990’s, we even had an official Outreach Committee.

Section 8023 of the Budget Reconciliation Act of 2005 established requirements for Guarantee Agencies to engage in “College Access Initiatives,” which has led to much of this “buzz.” As usual, Oregon is on the cutting edge of this trend, and we already have several access initiatives under way in our state.

**GEAR UP** is a federal program that provides 6-year grants to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. Oregon’s GEAR UP program works with students in 16 high schools and 23 middle schools. If you’re interested in helping out with this program, their website is: [gearup.ous.edu](http://gearup.ous.edu)

**ASPIRE** is a state-wide access program run by the Oregon Student Assistance Commission. It provides mentors to high school students to help them navigate the college admissions and financial aid process. ASPIRE has sites in high schools across the state. If you’d like to commit one hour a week (that’s all it takes!) to mentor a high school student in your community, check out their website at: [www.aspireoregon.org](http://www.aspireoregon.org)

**TRIO** is another federal program that supports Upward Bound, Talent Search, and other programs in Oregon. These programs are on

OASFAA member college campuses. In Oregon, Chemeketa Community College, Lane Community College, Portland Community College, Portland State University, Southwestern Oregon Community College, Umpqua Community College, and University of Oregon currently have TRIO programs on their campuses. To volunteer, find the program nearest you at: [www.trioprograms.org](http://www.trioprograms.org)

**College Goal Oregon** will make its debut on Saturday, January 20, 2007. Modeled after successful programs in the state of Indiana and at our own Portland Community College, this event provides free expert help in completing the FAFSA and the OSAC Common Scholarship Application. To volunteer, send me a quick email ([satalino@nela.net](mailto:satalino@nela.net)). We’ll get you signed up at a site convenient to you.

**I’m Going to College** is a program developed by CASFSAA and run on several college campuses in Oregon and Washington. Oregon Institute of Technology invites EVERY sixth grade student in the Klamath Basin to campus for a day, where students experience “real-life” lessons in finance, college admissions, financial aid, and college classes. Portland State University also participates in the program, carefully targeting students at Title I schools in the Portland Metro Area. For more information, contact Katy DeRosier ([katyd@nela.net](mailto:katyd@nela.net)).

If you can’t locate a program that is close (or convenient) to you, or if you’re just the maverick do-it-yourself type, try partnering with your local public school to help spread the word about college access. At elementary and middle schools, contact the principal and offer to do a brief presentation at Back to School Night. At your favorite high school, call the counselor’s office and volunteer to help with their FAFSA or College Night. Need materials? Check out NASFAA’s Early Awareness website at: [www.nasfaa.org/Subhomes/ABCs/In dex.html](http://www.nasfaa.org/Subhomes/ABCs/In dex.html)

Start something new, or get involved with a program already on your campus! Did you know that the University of Portland partners with a group called Bridge Builders to help provide college outreach to students in their ‘Rites of Passage’ Program? Or that Pacific Northwest College of Art has been providing art classes to students in elementary and middle school buildings for over 15 years? You might be surprised at how easy it is to jump in and make a difference.

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## College Goal Oregon

by Jennifer Satalino,  
NELA Center for  
Student Success



The Task Force has been very busy working towards your first state-wide College-Access-And-Complete-The-FAFSA-And-Do-Your-OSAC-Application-As-Well Day.

We will host at least 15 College Goal Oregon events across the state on Saturday, **January 20, 2007**, from 9 am until 2 pm.

Of course, it won't be a successful event without you! Consider spending a portion of your Saturday helping Oregon students and families complete their first step on the path to college. We'll even throw in a free t-shirt!

Promotional information will be available at the Summer Drive-In Workshop. Further details will be in an upcoming issue of the OASFAA Newsletter.

Enjoy your summer, and please mark your calendar for Saturday, January 20<sup>th</sup>.

Sincerely,  
Your College Goal Oregon Task Force

# OASFAA Summer Drive-In 2006 Photo Gallery



## The Lazy Days of Financial Aid?

### Conference Sessions:

- 1) Loan Changes (HERA)  
Beryl Schantz, Edfund
- 2) OSAC Update  
Susan Degen & Dennis Johnson
- 3) What? Me Worry?  
Robert Rodrigues, Great Lakes
- 4) The Price is Wrong!  
Kevin Max & Eric Kleinman,  
Oregon Dept of Treasury
- 5) Generation Y: The Millennials  
Gerry Vanbooven, NELA
- 6) Get in the Game  
Sue Shogren & Breana Sylwester,  
University of Portland
- 7) Who Are You Looking For?  
Terry Leary, University of Oregon
- 8) Federal Update (Webinar)  
Marianna Deeken, Region X



*OASFAA President Tracey Lehman opens the conference.*



*Conference attendees at a general session*



*Robert Rodrigues of Great Lakes explains  
what every student needs to know about financial management*

### THANK YOU, SPONSORS!

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#### Silver

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ASA  
Campus Door  
Chase  
National Education  
Nellie Mae

# Experts Suggest New Ways to Pay for College

by Ian Crawford, EDFUND Communications

At a symposium late last year in Washington, DC, Advancing America's Competitiveness: The Role of Student Loans, leading researchers and policy experts introduced several innovative proposals in response to rising student debt levels in the U.S.

Co-sponsored by the Project on Student Debt and the American Enterprise Institute, the event brought together experts on student loans programs and trends, tax and budget policies, college access, and the role of debt in young people's lives.

They addressed three provocative questions:

1. Are college students borrowing too much, or not enough?
2. Can the federal investment in student loans accomplish more?
3. Are there tax solutions to the high cost of borrowing?

Panelists offered several proposals for redesigning federal student loan and tax provisions to maximize educational opportunity. These include:

- A repayment system in which borrowers would not have to start paying off student loans until their post-college income reaches nearly \$19,000. Above that amount, payments would not exceed a certain proportion of income, and that proportion would rise with earnings.
- A student loan forgiveness program for married borrowers with children -- \$5,000 for each child up to a total of four -- to limit the impact of student debt on family formation.
- A student loan repayment tax credit that could be claimed for both principal and interest when payments exceed approximately 10% of the borrower's income. Preliminary estimates indicate that such a credit would cost less than the current mix of higher education tax benefits.
- A new structure for tuition tax credits that would be simpler and easier to use, provide more aid to lower income families, and reduce the need to borrow.

To access the entire report, visit the Project on Student Debt Web site: [www.projectonstudentdebt.org](http://www.projectonstudentdebt.org)

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## Oregon Report Card

by Tracey Lehman, OIT

The following data is from National Post-secondary Student Aid Study (NPSAS), which is done every 4 years by the National Center for Education Statistics. Oregon was one of 12 states examined. Some facts you may find interesting about Oregon students:

- 32% of students are at a public 4-year, 9% at a private 4-year, 50% at a public 2-year
- 57% of undergraduates in Oregon applied for federal financial aid
- 34% of all undergraduates borrowed
- median income for dependent students was \$59,200; \$24,500 for independent
- average tuition and fees for low- and middle-income residents (full-time, full-year undergraduates) was \$5,460
- 77% of graduating seniors had borrowed

More details available at:  
<http://www.nces.ed.gov/dasol>

## Member Opinion Essay:

**MyRichUncle and Integrity of Aid Administrators and Colleges**  
by Tracy Reisinger, University of Portland

My name is Tracy and I'm passionate about financial aid and the financial aid profession. There I've said it. It's out in the open for all to see. I don't think anybody who knows me would say I was shy about stating an opinion or expressing myself on any financial aid issue. There is one thing I have always loved about my fellow financial aid colleagues: we all recognize we have a role to play in the financial aid process and we are all partners in helping students and families find what educational program works for them and what aid options are out there to make the educational program of choice be affordable. Whether we work at a for-profit school, private non-profit, two-year or four-year public, or a lender or guarantee agency, or a scholarship organization, we all play a part in the process. Students and families look to us for guidance and help through this complicated financial aid system. I respect all of my colleagues and I have never felt anything but respect from my colleagues. In 18 years in the profession, I have never been accused of being unqualified or unethical.

This perspective changed at a recent WASFAA Executive Board meeting in Los Angeles in June, and later at the NASFAA Annual Conference in Seattle in July. For the first time I can remember, I had an experience with a lender that can only be described as insulting, and frustrating to the extreme. It started at the WASFAA Executive Board meeting when a copy of an ad from MyRichUncle (MRU) was passed around the room.

*continued on page 13*

continued from page 12

In the ad, which included information from the website, MRU listed various reasons why students should not trust financial aid administrators at schools, including stating, "Financial Aid Administrators may recommend lenders that make their lives easy, rather than lenders who offer the best loans. In fact, some schools accept flat-out cash to refer you to certain lenders... They may attempt to restrict your options to their preferred lender list for reasons that benefit them, not you."

Many on the board were upset at this portrayal of financial aid professionals. At the NASFAA Annual Conference in Seattle, MRU had a large booth with many representatives and they were the major sponsor of the keynote speaker. I and several of my WASFAA colleagues went to the booth to speak to the President of the company, Raza Kahn, to express our concern about the negative ad campaign and how it sets up an adversarial relationship between students and aid professionals.

We presented our concerns that this marketing strategy was not only lumping 99% of the ethical and good standing financial aid administrators with the 1% (or less) that acted unethically, but it also created an adversarial relationship from the start between students and the financial aid offices. It is hard enough to convince students to ask for our assistance when they are already scared and frustrated with a confusing process, without also having to counter the misconception that the people they have to work with don't care about them and are only looking out for their own best interests. We tried to convince the Mr. Kahn that we are all team players trying to help the student through the process and find the loan product that works best for them, and that cost is only one variable in the decision-making process.

The colleagues I went with to this meeting did not recommend MRU for various reasons. One was a Direct Lending school; one had no preferred lender list and would certify any loan given to them and made no recommendations; one had a list and had determined that MRU did not offer better benefits than the lenders she chose for her list. I have a list and also found that my preferred lenders offered the same or better benefits. Also, I choose lenders based on customer service (not just benefits) and had no experience (good or bad) on which to base adding them to our list at this time.

The President of MRU, instead of addressing our concerns, proceeded to question all of us on how we made our lists, asked if we were certified financial planners or not, and told us if we and our staff were not certified that regardless of years of experience in financial aid we were not qualified. He asked us, "Why should I want to work with you?" He wanted us to explain to him why his organization should work with aid administrators and schools when we weren't qualified and weren't looking out for the student, and he could go directly to them. He also proceeded to tell us that schools had refused to certify MRU loans, which he stated was not legal, and that MRU was seeking legal action. When we asked for

clarification of what the schools had actually done he said, "They refused to recommend us." We explained that was very different from refusing to certify a loan application.

In my opinion, this organization and its President appear to have no respect for the role schools play in assisting students meet their education goals. Just because a school does not agree to put MRU on their lender list does not mean we are not looking out for the best benefits for our students. Decisions are made for many different reasons, including customer service and ease of communication and problem resolution. If I had this much difficulty communicating with the President of the company, I certainly wouldn't subject my students to them.

He asked why he should want to work with us. I ask the same question back to him. Why should I want to work with an organization that from the start tells me that I and my entire office staff are unqualified and unethical? I still believe we are all partners in the financial aid community. Unless we can learn to work together with respect and understanding of what each of do, students and families will continue to find the entire process confusing and frustrating. I hope that Mr. Kahn and MyRichUncle come to understand and accept the financial aid administrator's role. Negative mud-slinging doesn't help anybody, least of all the students we all are trying to serve.

### *NASFAA Says...*

On August 4, 2006, NASFAA President Dallas Martin wrote a letter to Raza Kahn, president of MyRichUncle. Dallas Martin stated,

*"The focus of your marketing campaign implies that financial aid administrators are unethical, uncaring about how they serve students, and engaged in activities detrimental to students seeking federal or private loans. Needless to say, we strongly disagree with this all inclusive, undocumented characterization. Further, we are deeply offended that you would use an approach that encourages students to question the trustworthiness and practices of all financial aid administrators and to ignore or bypass the available services and information that their offices provide."*

NASFAA refunded the organization's financial support and refuses to accept further advertisements or sponsorships until the company has 'sufficiently' retracted "...the implied accusations and innuendos... leveled against all members of our profession."

July, 2006

Robert Nitsos and Athena Huschka are pleased to announce the creation of the **Peggy K. Nitsos Memorial Scholarship** fund at Southern Oregon University. This scholarship will be awarded to students with financial need at the discretion of the Director of Financial Aid at SOU – the position held by their mother at the time of her passing last year.

“Athena and I both feel that this scholarship is something our mother would have appreciated when she was the Director of Financial Aid at SOU,” said her son Robert Nitsos. “There were many times that she told us of students that she wished she could help if she only had access to some extra funds – this scholarship will do just that.”

Peggy’s children are hoping to raise \$25,000 over the next five years in order to make this an endowed scholarship. Anyone who would like to contribute may send a check or money order (with Peggy K. Nitsos Scholarship Fund in the “memo” field) to:

Southern Oregon University Foundation  
1250 Siskiyou Boulevard  
Ashland, OR 97520

Credit card donations may also be made by calling one of the following phone numbers:

(541) 552-6128 or (541) 552-8257

Peggy Nitsos passed away suddenly on June 21<sup>st</sup> of last year. She served the SOU community for over 20 years, eventually working her way up to Director of Financial Aid.

Questions may be referred to Robert M. Nitsos at [rnitsos@lmu.edu](mailto:rnitsos@lmu.edu).

With deepest thanks,

Robert M. Nitsos  
Athena Huschka



Peggy K. Nitsos

## *OASFAA Contribution*

On July 19, 2006, the OASFAA Executive Council voted unanimously to donate \$1,000 towards the Peggy K. Nitsos Scholarship Fund at Southern Oregon University. The possibility of future donations from OASFAA is being discussed.

Members are encouraged to consider making individual contributions towards this fund.

To: Southern Oregon University Foundation  
1250 Siskiyou Boulevard  
Ashland, OR 97520

From: Tracey Lehman

Date: July 24, 2006

On behalf of the Oregon Association of Financial Aid administrators (OASFAA) I am pleased to send you a check for \$1000 for the Peggy K Nitsos Memorial Scholarship fund. As you know Peggy was active in OASFAA for many years and received our Unsung Hero Award in 2005. For those of us who knew her she is greatly missed. Her dedication to her students and the financial aid community as a whole is admired by many. We hope that many will follow our lead in honoring Peggy.

Sincerely,

Tracey Lehman  
President OASFAA  
Director of Financial Aid Oregon Institute of Technology

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were most often displayed. What does that mean to you? Well, these students are the ones that end up at your front counters and in your offices. They are sleep-deprived, scared to death they won't reach the goal they so desperately want and they are frustrated. Many resort to yelling or making unreasonable (to us) demands. So often they are viewed as thorns in your side, a time-consuming student who takes a lot away from the huge workload I know you carry. I am asking that you stop and consider the person in front of you. What can you do to calm them down, alleviate their fears, make them feel they are being

*"...A hard job, but oh,  
so worth it..."*

heard? The majority of these students do not go through life screaming at the top of their lungs to get the services they think they deserve. Stop and remember what happened to you the last time you felt that you were not being heard or that you felt someone was putting a block to your hopes and dreams. How did you react?

You do such great work each day. Somehow you manage to get files reviewed, hold hands, connect students to services within and outside of the college community, and inch someone closer to walking across the stage in June. A hard job, but oh, so worth it.

So, am I really leaving financial aid? Yes, after a bit of a break I will be hunting for that perfect counseling job. Working in a college or university would be my preference but I am open to just about anything. As for financial aid, it is true that I will be offering workshops at conferences and on an individual office basis to improve interpersonal communication skills and help to reduce the anxiety and burn-out felt by the student services community. See, I just can't get that financial aid bug out of my system.

Stay in touch and keep up the good work.  
Sue Gano ([suegano@comcast.net](mailto:suegano@comcast.net))

## Training Update

The **FA101 Workshop** Co-Chairs are evaluating whether there is sufficient interest in holding this training in October. Other organizations provide this type of training, and the Co-Chairs are considering development of an **FA201 Workshop** instead. They are interested in member feedback.

Please email Crisanne at: [cwerner@linfield.edu](mailto:cwerner@linfield.edu)

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## On the Lighter Side

In a recent petition to have aid eligibility reinstated after a student failed to meet our satisfactory academic progress policy, a young woman wrote: "I did not complete enough credits during the term because I unexpectedly got pregnant. I can submit proof of this to you if needed." Our office wasn't exactly sure what sort of proof would be submitted, but we didn't want it, regardless.



A counselor in our office received a request in which a student clearly wrote, "I need more parking loads." The entire counseling staff was baffled by this and had no idea what the student was requesting. Thankfully, one of our staff members at our front desk remembered talking with this student and realized that he was requesting an increase in his Perkins Loan.



*submitted by Ryan West  
Western Oregon University*

*Share your financial aid anecdotes (no names, please!)  
with people who understand. Email: [shogren@up.edu](mailto:shogren@up.edu)*

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*In Closing: take a deep breath and relax...*





**your  
ad  
here**

contact: Nancy Hanscom  
*[nhanscom@uoregon.edu](mailto:nhanscom@uoregon.edu)*