

An Introduction to the Person and the Plan

remarks from your president



Yvonne Gutierrez-Sandoval
2010 CASFAA President
Pitzer College

I am so grateful for this opportunity to serve as your 2010 CASFAA President. CASFAA is a very special organization to me. My first experience with financial aid administrators and with CASFAA was almost 11 years ago with the "I'm Going to College" project. I was the student intern with the Claremont Colleges' project and was impressed with the dedication of the financial aid people from Claremont, who volunteered their time for this incredible project. One of the people on that project hired me six months later for a vacancy in the financial aid office at Pitzer College, and my career was born. I have grown in experience and knowledge and CASFAA has played an important part in that for me over these 10 years. I have learned so much and have met so many wonderful and dedicated financial aid professionals. I would never have thought, ten years ago, that I would be standing before you today as your 2010 President.

2010 promises to be an exciting year with many

challenges and I can't wait to get started. I have spent a lot of time in 2009 meeting and consulting with many of our distinguished past leaders and have listened to what you, our most important resource, would like CASFAA to do for its members and for all of the students of California. I have had the opportunity to hear about your dreams and wishes for our Association and, without exception, I have been inspired by your visions.

My goals for CASFAA over the next year come from our Association's Strategic Plan, which was developed over the last five years by many of you.. Let me tell you a little bit about this ambitious 5-Year Plan before I tell you which of the seven strategic goals outlined in the plan I have chosen to focus on for 2010.

The Strategic Plan was developed three years ago after membership surveys and focus groups informed CASFAA's leadership about what was most important to our members and the students we serve. Seven goals were established and each year the Executive Council works very hard toward meeting those goals. Let me review the seven goals the CASFAA leadership established:

1. Provide consistently high quality training and professional development opportunities that meet the needs of our diverse membership base.
2. Play a leadership role in public policy at the state and federal levels.
3. Increase membership and encourage balanced

- continued on page 3

In This Issue:



Building Success Together -
casfaa conferencepage 5



Working with a Co-signer -
student loan tipspage 8



Congratulations Goes To -
casfaa awardspage 14



Minutes of Executive Council -
dec. 14, 2009page 20

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EDITORIAL POLICY

Opinions expressed in this newsletter are those of the authors and not necessarily of the Association or of the institutions represented by the authors.

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Understanding Tax Returns

casfaa workshops you should attend



Ryan Smith
CASFAA 1040 Chair
Kaplan, Sacramento

Come join us for lively “give-and-take” workshops for beginners and advanced federal tax training for financial aid administrators. At the end of the beginners workshops, you will:

- Understand how the 1040EZ, 1040A and 1040 are used in the financial aid process.

At the end of the beginners workshops, you will:

- Begin to understand the 1065 (Partnerships/LLC), 1120S (Subchapter S Corp) and 1120 (Corp) returns and how they are used in financial aid.
- Begin to understand how personal and business tax returns can provide an insight into family asset and income levels.



Even though Jim Briggs, the “Tax Detective” is an accountant, there will be no “accountant talk” during the day. All tax and financial aid issues will be discussed in “plain talk.” Bring your questions and a good sense of humor and get ready to have fun with taxes and financial aid.

CASFAA Beginner 1040 Training

Mar 15 Samuel Merritt University, Oakland, CA

Mar 18 Claremont Graduate Institute, Claremont, CA

CASFAA Advanced 1040 Training

Mar 16 Samuel Merritt University, Oakland, CA

Mar 19 Pitzer College, Claremont, CA

\$75 Members \$150 Non-Members

For more details about the upcoming workshops and how to register, check out the CASFAA website and read upcoming announcements. In the mean time, please feel free to contact me (rysmith@kaplan.edu). 📧

Not a Quorum

special election results



Barbara Bickett
2010 CASFAA Past President
DeVry University

Recently CASFAA's 2009 Executive Council held a special election with regard to bylaws modifications. We did not achieve a quorum and therefore the by-law modification did not pass.



Thank you for your continued support of CASFAA during this time for our profession and for our association. 📧

An Introduction to the Person and the Plan

continued from page 1

representation and support for all segments of CASFAA.

4. Maintain and strengthen the fiscal stability of the Association.
5. Provide opportunities for all interested members to participate actively in CASFAA activities and to serve in a leadership capacity within the Association
6. Provide members and other constituents with relevant, timely information about Association activities and other financial aid issues.
7. Enhance and institutionalize effective governance and planning systems.

We have made solid progress over the last three years but much remains ahead of us.

As your President, I am asking the 2010 Executive Council to focus on the following three goals during the next year:

1. Increased communication with the membership. We will continue sending email blasts when there is breaking financial aid news. Many of you have told us how much you appreciate these blasts and we will make every effort to keep you up-to-date on financial aid news that affects your office, your institution, and last but certainly not least, your students. I am committed to posting Executive Council agendas, minutes, committee minutes and other information on the CASFAA website in a timely way so you are completely in the loop. We will also include this information in the CASFAA newsletter on a regular basis. We plan to send short surveys to gather your opinions to inform

both the Federal and State Issues Committees. This leads me to my second goal:

2. Increased advocacy efforts on the part of CASFAA. Financial aid is a rapidly changing world and we need to be able to respond quickly. It is also important that CASFAA take its place in the conversations that are held in Sacramento and Washington D.C. about financial aid. I will ask both the State Issues and Federal Issues Committees to commit to using short "flash" surveys to gather information about the affects of proposed changes on the segments and to be prepared to respond quickly on behalf of CASFAA, its members, and the students of California.
3. Reduce our Association's spending and increase revenue. These are challenging times for all of us, personally and institutionally, and CASFAA is no different. The financial support we have enjoyed over the years from our lender partners and colleagues is no longer something available to us. We need to aggressively seek new partners and sources of revenue to help us provide valuable training to our members, the Newsletter, the website, and the annual conference. We welcome all of your ideas to help us accomplish this.

These are my goals for CASFAA for 2010, but I cannot do it alone. I am very fortunate to have an eager, energetic, and dedicated Executive Council and a solid team of committee/project chairs to help me, and you, achieve success with these goals. We have a good mix of new members and their fresh perspective will add to the wisdom of our more experienced members. We are all volunteers and there is plenty to do, so, if you want to get involved actively with



CASFAA I hope you will do so. Who knows where it might lead—I would never have thought that that young, inexperienced "I'm Going to College" intern would stand before you as your President.

If you have ideas about how to meet these goals, or directions we should move in, please let me hear from you! One thing I have learned is that we all are stronger and smarter together, so please join me in making 2010 a productive and rewarding year for all of us. Together, we will face all of the challenges, and together we can make 2010 a year of active participation, a year of innovation, and a year of solutions.

I am honored and I am humbled and I thank you for this chance to work collaboratively with all of you! 🌈



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Building Success Together

2009 casfaa conference



Colleen MacDonald
CASFAA Newsletter
Editor
EdFund

With so many changes and uncertainty in the financial aid industry, we all need to draw from each others' successes and build on them. Hence, CASFAA members embraced the theme of the conference "Building Success Together" at the 2009 CASFAA Conference.

The major speakers provided humor, inspirational messages, and updates on what the future may hold. The 2009 CASFAA Conference opened with Marcel Forestieri also known as the "Jay Leno

Clone," as seen on the Tonight Show© and host of the World Famous "Legends in Concert" from Las Vegas, who interviewed many of our featured speakers such as NASFAA's Interim President and CEO Joan Crissman, Inspirational Speaker Matt Jones, and Jeff Baker, Director, Policy Liaison and Implementation, U.S. Department of Education, Keynote speaker Mr. Robert Shireman, the Deputy Undersecretary of the Department of Education, spoke at the opening session about how President Obama has elevated post-secondary education with several strategic initiatives.

NASFAA's Interim President and CEO Joan Crissman, 2009 NASFAA Chair, Barry Simmons, Sr., and Mindy Bergeron, WASFAA President were able to highlight volunteers, financial aid training successes,

policy issues, and advocacy efforts within our region and nation. Also, Jeff Baker closed the conference with details of Department of Education rules, regulations, and guidance.

Our novice financial aid professionals benefited from our series of basic training opportunities along with the annual pre-conference "Proprietary Certification Workshop." Sessions included SAP 101, 1040 Review, and R2T4. Seasoned veterans enjoyed philosophical and strategy discussions with more advanced offerings, such as "Outsourcing" and "Spark the Flame of Excellence and You Too Can Do More with Less." Also, participants learned about new laws and regulations at sessions like "Year Round Pell and More - How do we do That?!" and "Sizing Up the

- continued on page 6



BUILDING SUCCESS TOGETHER

- continued from page 5

3-Year CDR: What It Means For Schools and Borrowers.” Graduate and Professional schools found sessions tailored just for their benefit like “Plan Your Roadtrip to Graduate School” and “Income-Based Repayment - Could it Get Any More Complicated?.” Also, many participants had great things to say about the new six session track on Fiscal Officer Training and the “Leadership for the Seasoned Professional” track with Terry Everson.

During the Ethnic Diversity Committee Reception on Saturday, attendees were entertained by “CASFAA’s Got Talent.” Hosted by Marcel Forestieri



2009 CASFAA CONFERENCE

as "Regis Philbin Clone," conference attendees were not only amused by the CASFAA judges, Yvonne Gutierrez-Sandoval, Charles Conn, and Lawrence Persky. The dynamic, creative and comical performances were very exciting and fun to watch. The audience was very impressed with the production and appreciated all of the hard work that went into the show.

Over lunch on Sunday, Matt Jones moved and inspired CASFAA members with descriptions of the lessons he learned as a three-time cancer conqueror.

The President's Reception allowed for a relaxed setting for attendees to meet and chat. The evening continued with music and lots of dancing. It was fun to relax and have fun together.

As the conference finished, folks were grateful for the opportunity learn, relax and support each other. Let's build success together this year as an association! 🏡



Working with a Co-signer

private student loan tips



Patrick Kandianis
Simpletuition

It is very difficult for students to be approved for a private student loan on their own. As such, if you are a student borrower, without an established credit history and a current, steady income:

- You **WILL** need a co-signer for a private student loan.
- Your co-signer must have “good” to “excellent” credit and an income.

Overview

Due to the current credit crunch, it will be harder than ever to be approved for a private student loan this year. Lenders are making their credit criteria stricter than in years past. For almost all students, a credit-worthy co-signer will be a **REQUIREMENT** to be approved for a private student loan.

These tips provide you with advice on what to look for in a co-signer and how to make your case that co-signing a loan with you is a good risk to take.

Selecting a co-signer

Selecting a co-signer can be a challenge. It is not a casual decision to agree to co-sign a private student loan. The co-signer is hitching their wagon to you for 20 years (or more). They will be required to make loan payments if you fail to do so. Their credit could be damaged if you do not repay the loan on time. These risks may make a potential co-signer think twice about the commitment.

Not just any person will do as a co-signer. You have to find a willing co-signer who has a solid credit history and income they can document.

The ideal co-signer candidate must:

- Be willing to help you out in a long-term financial commitment.
- Have good or excellent credit, reflected in a strong credit score (roughly 675 or higher).
- Have adequate income they can document demonstrating that they could afford the obligation if you fail to make payments.

Tips:

- Parents and other relatives are the most common co-signers
- If mom or dad is willing to help out, they might consider the federal PLUS loan as an alternative.
- Shop around before committing to a particular private student loan.

Making your case to a co-signer

Before approaching a potential co-signer with a request for help applying for a loan, prepare.

- Do the math carefully to justify why you need to borrow the amount you are seeking
- Keep in mind that you might need to borrow for more than one year of school
- Estimate what the monthly payments are likely to be for all of your student loan borrowing
- Estimate what your income might be after graduation (the career office at your school might be able to help you make these estimates)
- Make sure that your expected monthly payments would fit in your likely future income (experts advise that student loan payments not exceed 8% of your



gross income)

- Demonstrate your ability to be financially responsible - show evidence you can pay bills on time and stay organized with paperwork
- Research private student loan options and select the best loan for you
- Once you have outlined this information, you are ready to have a talk with your potential co-signer. Set aside adequate time with your co-signer. Show the potential co-signer that you have carefully thought through the size of the obligation – and that you believe it is something you can handle. Be honest and open with the potential co-signer about how this obligation will be a long-term commitment on their part.
- Go over your calculations and loan choices with your co-signer. Loan comparison sites such as SimpleTuition provides the ability to email and print loan information on dozens of lenders – use those tools as ways to share information with your co-signer.
- Be honest about the fact that in order for the loan application to be accepted, the co-signer will need to have a strong credit score (roughly 675 or higher) and will need to document their income.

Independent California Institutions

share your concerns and ideas



Susan Murphy
CASFAA Independent
Segmental
Representative
University of San
Francisco

After accepting the CASFAA President's invitation to serve on the Executive Council as the 2010 Independent Segmental Representative, I took a minute to dig through drawers and files to see what I might have saved from the last time that I was a Council member. I think I knew it all along, but was startled, nevertheless, to find that I last served in elective office in 1990.

In the intervening 20 years, the changes

to our profession and to our professional associations have been epic, but they will very likely pale in comparison to the changes to come. I'm looking forward to being part of what comes next for CASFAA and am confident that our colleagues working in independent California institutions will play an important role in defining what our Association becomes.

I'm interested in your concerns and your ideas. You may contact me directly at murphy@usfca.edu or reach me by phone at 415.422.2620. 📞



Give them this information before they agree to help you – that way if credit is a problem, they can bow out without having to tell you exactly why. Credit is a highly personal matter that many people don't like to share – even between parents and children.

- Listen to any concerns your co-signer has and respond to them honestly. In subsequent academic years, you should revisit and update the case you made; once again showing the co-

signer that you have carefully thought through this substantial obligation.

Applying for the loan

Once your co-signer agrees to help you, complete the application (either online or via phone) together with your co-signer. It is much more efficient if the process is handled in one session.

Shop around and compare private student loan options as part of your quest for college financing.

Repaying the loan

Most private student loans allow up to 20 years for repayment. Prepare for the long term and treat this shared obligation as a serious, ongoing commitment. Here are some tips:

- Make sure you are prepared for the first payment – usually six months after leaving school; many recent graduates miss the first payment amidst all the life changes after college (new job, new address, etc.).

- Don't miss any payments – this can significantly damage your and your co-signer's credit.
- If you encounter financial difficulties, do two things with respect to your student loans:
- Contact the lender before things get too dire to investigate possible deferment and forbearance options.
- Keep your co-signer in the loop, no matter how uncomfortable this may be. It will be much worse if the co-signer only finds out about your financial difficulties when they see a negative entry on their credit report.
- Keep in touch with your co-signer, especially to inform your lender of any change of address, name or contact information.
- Update your co-signer on how you're doing – as you move forward in your career and start earning more, your co-signer will be glad to know that you are increasingly better able to handle your shared obligation. 📞



Governor's Budget and More

csac update



Diana Fuentes-Michel
California Student Aid
Commission

The Commission and staff wish you a successful and prosperous 2010.

2010-11 Governor's Budget

The Proposed 2010-11 Governor's Budget was released on January 8, 2010. I want to share with you a bulleted summary of proposals in the 2010-11 Governors' Budget which pertain to the Commission and the programs we administer.

- The Governor proposes to suspend the Cal Grant Competitive Program. Existing awards would be maintained. 22,500 new awards would be eliminated for a projected savings of \$45.5 million.
- The Governor's proposal relies on \$6.9 billion of Federal funding. In the event the funding is not received, the Governor proposes an additional \$79 million reduction in the Cal Grant program by:
- Freezing the level of the awards (decoupling the Cal Grant award amount from fee increases: 15% for the University of California and 10% for California State University.)
- Freezing the income ceilings for new Cal Grant awards.

Additional information about the 2010-11

Governor's Proposed Budget can be located at www.dof.ca.gov.

California National Guard Education Assistance Program

Administered by the Commission, the California National Guard Education Assistance Program, in partnership with the California Military Department, is a state-funded program designed to provide an educational incentive to improve skills, competencies and abilities for up to 1,000 service members who remain active in the National Guard, the State Military Reserve, or the Naval Militia. Recipients may receive up to \$9,700 for education assistance. For additional information, contact Katrina Beck at 916. 854.4255 or go to www.csac.ca.gov.

2010-11 Student Expense Budgets and Income and Asset Ceilings

The Commission has released the final Student Expense Budgets and the Income and Asset Ceilings for the 2010-11 academic year.

The Student Expense budgets are based on the 2006-07 Student Expenses and Resources Survey (SEARS) data which have been adjusted for inflation or deflation using the California Consumer Price indices.

The Student Expense Budget and Income and Asset documents are located on our homepage at www.csac.ca.gov under the Quick Hits section. If you have any questions, please contact Bev Kerth at 916.464.3332 or bkerth@csac.ca.gov, or Tabitha Frost at 916.464.2113 or tfrost@csac.ca.gov.

2010-11 Cal Grant GPA Verification and Electronic GPA Submission Training

The submission deadline for grade point average (GPA) verifications is March 2, 2010.

The 2010-11 Cal Grant GPA Verification Form is available for download from the Commission's Web site at www.csac.ca.gov. Pre-printed paper forms are not available for ordering in bulk. Please download and print the forms if you are not electronically submitting GPAs.

GPA uploads from schools for the 2010-11 academic year Cal Grant awards are now being accepted.



We strongly encourage all schools to upload GPAs electronically. This initiates immediate confirmation that the GPAs were accepted and allows students to immediately view their submitted GPAs through "WebGrants for Students." As an alternative,

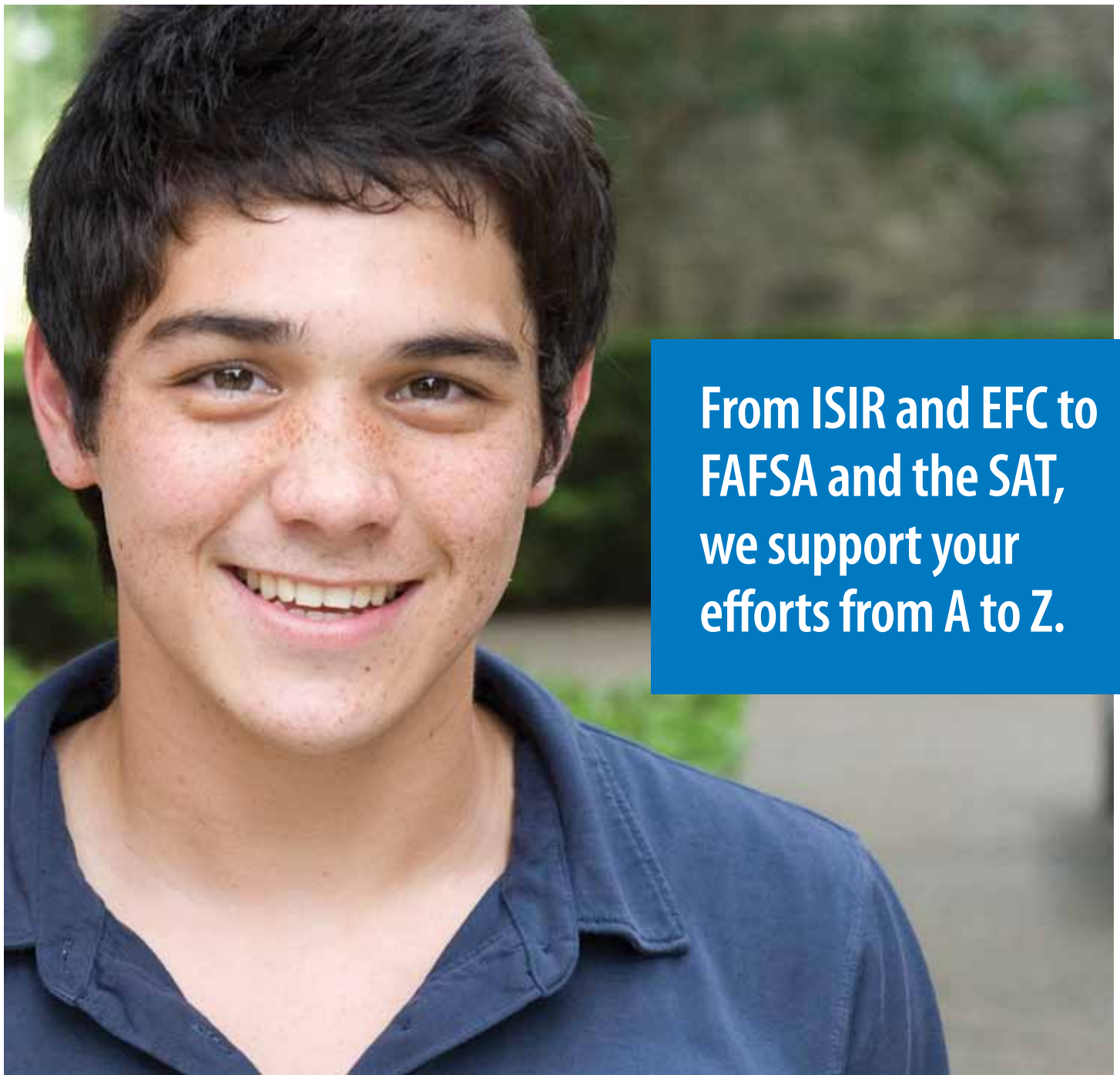
schools may continue to use paper GPA Verification forms, which can take 6 – 8 weeks to process.

The Electronic GPA Submission Training Sessions will be conducted via webcast during the months of January and February 2010. This training was developed to support institutions that currently upload GPAs electronically through WebGrants and want to learn more about the process, and to assist institutions that currently mail paper GPA forms and want to learn how the electronic upload process operates. Each online session will be one hour in duration. Participants will be able to ask questions through a "chat" feature during the training.

You may register for the training session at www.csac.ca.gov. A confirmation email will be sent to participants with the log in instructions for the website as well as teleconference phone line information. We recommend that institutions set up a WebGrants account prior to the training session.

The Commission has also posted videos on YouTube and Teacher Tube to provide guidance to schools on the GPA submission process. The videos can be accessed at <http://youtube.com/castudentaid> and on Teacher Tube at <http://teachertube.com/> (select the "Videos" tab and type in "GPA").

For additional assistance, schools may contact the Commission's School Support Services staff at 888. 294.0153 or schoolsupport@csac.ca.gov.



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Conference Exhibitors

special thanks



Kimberly Williams
2009 Fund
Development Chair
Western Career College

CASFAA would like to take this opportunity to thank our exhibitors at the 2009 "Building Success Together" Conference. We wish to acknowledge the help and assistance of the following organizations:



ACS, Inc.
American Student Assistance
Citibank, The Student Loan Corporation
California Lenders for Education (CLFE)
Discover Student Loans
Edamerica
Edfinancial Services
EdFund
Educational Credit Management Corporation - ECMC
ELM Resources
Fastweb
Financial Aid TV
First Associates



Great Lakes Higher Education Corporation
Hershey Systems, Inc.
Higher One
Mapping Your Future
National Education
National Student Loan Program
Nelnet
Sallie Mae
Springbok
Tuition Financing
Texas Guarantee - TG
US Bank
USA Funds
Wells Fargo Education Financial Services





Congratulations Goes To...



Barbara Bickett
2010 CASFAA Past President
DeVry University

Throughout the 2009 CASFAA Conference, we celebrated our volunteers and members of the financial aid community with awards and tributes. The following not only describes the awards but also highlights about why CASFAA chose the recipients.

LIFETIME MEMBERSHIP:

This award is given to a person who has made major and significant contributions to the profession over an extended period of time. Lifetime Membership awards are the highest awards CASFAA can make and are only awarded in exceptional cases.

JOANNE BRENNAN

Joanne has worked tirelessly for CASFAA for 28 years—her husband says she is married to CASFAA! Joanne is the current Director of Financial Aid at Career Colleges of America. She has always worked in the Proprietary Segment and has served on too many committees to list, but has been on the Proprietary Committee for over 10 years. She served the membership as your President in 2005 and is the current chair of the Conference Committee. Joanne rose to the challenge in these tough economic times and put together an outstanding conference in spite of all the difficulties the committee faced this year. She was also Co-chair of the 2007 conference. Because of her dedication to CASFAA, the Executive Council is pleased to make Joanne Brennan a Lifetime Member.

NANCY COOLIDGE

How can we possibly ever thank Nancy for her alerts on CASFAA-L and WASFAA-L! We have come to depend upon her notifications of breaking news in our profession because she is up

on all of it and so willing to share the information with all of us. Nancy has worked at the University of California Office of the President for many years and has consistently served CASFAA on the Federal Issues Committee. She has presented at many, many conferences—providing more federal updates than we have fingers to count. In 1992 Nancy received the President's Award, in 1995, the UC Segmental Award, in 1997 the Distinguished Service award and in 2005 the Meritorious Service Award. So where could we go? We went straight to a Lifetime Membership for this energetic, delightful and dedicated professional.

MERITORIOUS SERVICE:

Created in 1994, the Meritorious Service Award is given to a CASFAA member in recognition of an outstanding achievement or accomplishment in the financial aid profession. To receive the award, the individual should have made either an important single accomplishment or contribution or several significant accomplishments or contributions. Current members of the Executive Council are eligible for this award.

COLLEEN MACDONALD

Colleen is the current Editor of the CASFAA Newsletter. Her real job is Director of Client Services for Northern California with EdFund. Prior to that she was Director of Financial Aid at the Stanford University Graduate School of Business and was active in Graduate and Professional Issues, serving as Member-at-Large on Executive Council. Recently, she was

the conference co-chair for the WASFAA Conference in Alaska. She has chaired the NASFAA Graduate and Professional Issues Committee and NASFAA Research Committee. In these tough economic times, she has consistently provided a quality newsletter for the membership under tight financial constraints. Her past achievements and participation in addition to the ones listed above include numerous conference committees, service on several other CASFAA committees as well as holding down her "real" job. For her meritorious service as a consistent participant in a leadership position, the Executive Council is proud to present Colleen MacDonald with the Meritorious Service Award for 2009.

DISTINGUISHED SERVICE:

The Distinguished Service Award is given to a member of the financial aid community, government official, private citizen, or a corporation or other organization for outstanding service to the profession

BRYAN DICKASON

Bryan has been at the California Student Aid Commission (CSAC) for 19 years. He has been with Customer Service and then Outreach and Training. It is during his tenure in Training that all of us grew to depend upon his assistance—he is never too busy to take a phone call, make a trip to a campus to provide personal training, and provide the Executive Council with reports on what is happening at CSAC and what the Commission is doing as well as legislation that may affect our students. He is currently in the Operations



President's Special Award:
Joanne Brennan



Lifetime Membership:
Nancy Coolidge



Meritorious Service:
Colleen MacDonald

2009 casfaa award recipients

Division, but continues to help us when we yell “uncle.” Bryan is a CASFAA and CCCSFAAA member and has served on the CASFAA Conference Program Committee as well as presented at numerous conferences. In 2004, he co-chaired the High School Relations Committee which won Committee of the Year for their work to provide information to our students, their parents and to us! He has been the liaison to Executive Council since 2006. You would never know he has a daughter old enough, but he tells us his younger daughter is a junior at UC Davis. Bryan is married with two daughters, but we sometimes wonder if he has time for his family as he devotes so many hours and days to us (including weekends). For everything that he does for the CASFAA membership, the Executive Council awards the Distinguished Service Award to Bryan Dickason.

KAREN GRUMM

We lost our Karen this year and it has been a mighty blow to all of us who knew and loved her. While deserving of many other CASFAA awards, Karen was always serving on the Executive Council which made her ineligible for them! She was the recipient of the 2001 Proprietary Segmental Award, however. She presented at conferences, mini-conferences and was a trainer for many years at the Proprietary Certification workshops. She served in many capacities on Executive Council and committees for both CASFAA and CCCSFAAA. At her memorial service, Karen’s Bunko Group commented that they hated us for making

her work so hard, but at the end of the event, they said they understood that Karen worked herself hard for the profession. Karen was EdFund’s Senior Client Relations Manager and started in financial aid in 1986. She worked at 4 schools in positions ranging from Financial Aid Office, Business Manager, Regional Financial Aid Director and Corporate Default Prevention Manager in both proprietary and independent segments. Karen was known as the financial aid acronym queen and volunteer extraordinaire with her committee work at EdFund, CASFAA, Proprietary Issues, CCCSFAAA and WASFAA. We are awarding this to Karen’s family posthumously for her leadership, participation and hard work on behalf of our students and us. Rest in peace, Karen knowing that we all miss your humor, your good cheer, and your devotion to the students of California.

CREATIVE LEADERSHIP:

The Creative Leadership Award is given to a CASFAA member who has demonstrated, through significant leadership, innovation in the profession.

MICHAEL DEAR

Mike is the Assistant Director at Sacramento State University. He started as one of those “unsung heroes” (you know—the ones who really know what is going on) on the front desk in the Financial Aid Office in 2000. He was dragged kicking and screaming into chairing the Cash for College Project for CASFAA two years ago. He exceeded expectations for a position that had no description and helped

create one. Working closely with CSAC, he guided the project to new heights and even agreed to chair for one more year! He served on Executive Council as CSU Segmental Representative and other CASFAA committees including the Federal Issues Committee. A newlywed, he divides his time between getting his new house landscaped and decorated, his “real job” and an almost full-time job as Chair of the Cash for College Project. For his significant leadership and innovation, the CASFAA Executive Council awards Michael Dear the Creative Leadership Award for 2009.

TIM RANZETTA

Tim is the founder and president of Student Lending Analytics an independent research and advisory firm focused on finding the best lenders for students. He got the idea for his company when he was helping his 14 nieces and nephews find student loan options. He received his MBA from Stanford Graduate School of Business and his BS in Finance from the McIntire School of Commerce at the University of Virginia. Tim has volunteered his time and expertise.

SPECIAL RECOGNITION:

From time to time individuals are identified whose personal efforts have made a significant difference for CASFAA. The Special Recognition Award is given in recognition of dedication and service beyond the normal call of duty.

SUNSHINE GARCIA

Sunshine began in Financial Aid in 1997 as a student employee at Azusa Pacific and has been in Financial Aid ever since! She started volunteering for CASFAA in 2001 and has held Chair or Co-Chair of the Ambassadors Committee several



Distinguished Service: Brian Dickason



Creative Leadership: Tim Ranzetta



*Creative Leadership:
Mike Dear*

Congratulations Goes To...

times. She is the incoming GP Segmental Rep and is currently the Director of Financial Aid and Interim Director of Admission at Cleveland Chiropractic College. Sunshine volunteered to be on the CASFAA Conference Registration Committee two years ago. She quickly became one of those people you can't do without! You know the type—up at o'dark early every day, stays late every night during the Conference, makes sure everyone has a name badge with their name spelled correctly, accepts your registration checks and makes sure they get sent to the Treasurer for deposit. More than that—she does it all with good cheer and a smile. Sunshine is a great example of a CASFAA volunteer—she loves the work and it shows. We hope to have her for many years as a CASFAA volunteer.

WAYNE MAHONEY

Wayne has worked over 30 years in our profession. He is currently consulting at Southwestern Law School where he was Director of Financial Aid from 1995 to 2008. He has worked at UCLA, University of LaVerne and Point Loma Nazarene University in various capacities. Wayne has been a member of CASFAA since 1997 and served as our President, Treasurer, Chair of Electronic Initiatives Committee, and numerous Conference Committees. Wayne will chair the Conference Committee in 2010. He was the recipient of a Lifetime Membership Award in 2008. Over the years Wayne has presented at several financial aid conferences and was the Graduate and Professional Member-at-Large. Those of us who work with Wayne are always doing the "we're not worthy" bow because he does it all, but what else would you expect from a former Marine? This award is bestowed in recognition of his work as Webmaster, coordinator with our CASFAA server



*President's
Special Award:
Beryl Schantz*

and his research to upgrade our website in the coming year as well as many, many other accomplishments. Thank you Wayne—we are not worthy of your most excellent service to CASFAA.

YVONNE GUTIERREZ-SANDOVAL

Yvonne is the current President-elect of CASFAA and as such, she put together one of the best Boot Camps for new Executive Council members and committee chairs ever! She started in financial aid at Pitzer College in 2000 as a Specialist, was appointed Assistant Director in 2002 and Associate Director in 2007 and continues to serve in that capacity. She chaired the 2008 High School Relations Committee in 2008 and that committee won Committee of the Year. She has served as Independent Segmental Representative, Federal Issues, State Issues, Electronic Issues and Mini-Conference Committees. She has presented or been a moderator at several CASFAA conferences. Her work this year to design a work plan for 2010, that responds to our Strategic Plan, will guide the Association in the coming year. She is very organized! For her work this year, the Executive Council recognizes Yvonne with a Special Recognition Award.

PRESIDENT'S SPECIAL AWARD:

The President's Special Award is given to an individual who has made significant contributions during the past year to the success of CASFAA. The recipient of this award is selected solely by the current President of CASFAA. In other words, I get to say thanks for your help during my tenure as CASFAA President!



*Special Recognition: Wayne Mahoney, Sunshine
Garcia & Yvonne Gutierrez-Sandoval*

DR. PATRICIA HURLEY

Pat has worked in financial aid for about 40 years at Boston College, College of Marin and currently as the Associate Dean and Director of Financial Aid at Glendale Community College. Pat is the current Vice President of State Issues, was Vice President of Federal Issues last year and has chaired the Federal Issues Committee several times. She was the Conference Co-Chair, Segmental Representative, past-president of CCCSFAAA and the CSAC Loan Advisory Committee. She was on the Board of Directors of EdFund and is currently a member of NASFAA's Board of Directors. Her work at the federal level is legendary: a member of the National Conversation Initiative, Reauthorization Task Force and NASFAA's Federal Issues Committees. She has been a non-federal negotiator on Neg Reg in 1999, 2002, 2006 and 2009. For her help to me on State Issues this year, I am proud to award my President's Award to Pat.

BERYL SCHANTZ

Beryl started out at Fresno Pacific University as a Counselor and Assistant Director. She left California to go to LeTourneau University in Texas (why would anyone do that?) and returned to California where she has worked in the Government Relations Unit at EdFund for the last 11 years. So all told, Beryl has 21 years living the joys and frustrations of our profession and finding the smallest kindness can help a student stay in school. As Vice President of Federal Issues this year, Beryl sent alerts to the membership about what was happening to us and ever-changing



*President's
Special Award:
Pat Hurley*



*President's
Special Award
Dewayne Barnes*

2009 casfaa award recipients (continued)

regulatory issues that needed response by us to the "feds." For her assistance to me on Federal Issues this year, I am pleased to award my President's Award to Beryl.

DEWAYNE BARNES

Do you know Dewayne? If you do, you will know he never says no and he always answers to "other duties as assigned" with a smile. Do you know how much that means to the President of CASFAA? It is immeasurable! Dewayne is currently the Associate Director of Financial Aid at Stanford Law and has been involved in CASFAA since 2004 in various committees. He chaired the Ethnic Diversity Committee and planned the Ethnic Diversity Reception as well as the Newcomers' Reception as part of the conference committee. This year he chaired the Membership, Volunteer and Ambassador Committee. I simply could not have done the job this year without Dewayne's help and willingness to do anything that was asked of him. Thanks Dewayne, I appreciate your help to me this year and am pleased to award you a President's award for 2009.

JACK EDWARDS

Jack has worked in higher education in New York, Washington, Arizona, and now California. Currently, he is the Director of Financial Aid at Stanford Graduate School of Business. He has amazing energy, lets you know exactly what he thinks, and strives to help to make goals happen. As CASFAA President, I was able to talk through issues with him on many occasions. As Graduate Professional

Segmental Representative, he supported the Executive Council activities and on Federal and State Issue Committees. As Graduate Professional Issues Chair, he helped orchestrate the CASFAA Summer Camp Training and GP Symposium. As Conference Committee member, he ensured that graduate professional segment interests were represented in the sessions. For his assistance to me as a sounding board, I am pleased to award my President's Award to Jack.

ROOKIE OF THE YEAR:

Created in 1994, the Rookie of the Year Award is given to a new CASFAA member or new volunteer to CASFAA activities in recognition of the accomplishments and contributions to the association in the year they first volunteer.

LAWRENCE PERSKY

Lawrence began as a work-study student at Arizona State University in 2000 (that is how we "hook" them). In 2003 he began full-time as a Financial Aid Specialist. In 2007, he came to California and began as a Financial Aid Counselor at UCLA. We had to keep his secret until CASFAA, but on December 1st, Lawrence accepted the position of Counseling Unit Supervisor at UCLA. See what happens to enterprising work-study students? Lawrence served as the UC Segmental Representative on the 2009 Executive Council and will be the Ethnic Diversity Member-at-Large in 2010. This is another example of a person who never says no and says yes with enthusiasm. He has been active as a member of the Electronic Initiatives Committee and will be webmaster for us

next year. Because Lawrence threw himself into CASFAA with his delightful personality, his willingness to volunteer and just all around Mr. Nice Guy, Lawrence is a recipient of a

Rookie of the Year Award for 2009.

RYAN SMITH

Ryan started in Financial Aid at Folsom Lake College in 2007 and is currently employed at Kaplan College in Sacramento where he says he became passionate about the profession. He was "volunteered" (he says hounded) by his supervisor to chair the 1040 Workshops coming up this year. Finding that he wanted to make a difference, he volunteered for Cash for College and met Congresswoman Doris Matsui and then volunteered for phone banks at Assembly member Dave Jones' office in Sacramento. He volunteered himself for organizing the CASFAA booth at this year's conference. When he became a CASFAA member, he attended the Proprietary Certification Training where he met several CASFAA volunteers who encouraged him including Colleen MacDonald who invited him to write for the CASFAA Newsletter and was ecstatic to see it published. He says his Boot Camp experience was awesome and wonderful. He has worked on getting the IRS involved in CASFAA training--a welcome addition. Ryan deserves a Rookie of the Year award because he has done an outstanding job for a volunteer in his first year (and we hope many years to come).

DANIEL REED

Daniel started in Financial Aid as a work-study student in 2001 and stayed there until 2005 (brave soul!!). Following his graduation from Point Loma Nazarene University, he was hired as a Financial Aid Officer. He has recently been promoted to Loan Coordinator. He volunteered this year to help with the President-Elect's Planning Committee where he says he was able to help "dream" for 2010. He also volunteered for the Membership Committee using his degree in Graphic Communications to design flyers and brochures. In 2010 he will serve on the Membership, Ambassadors and Volunteer Committee. For his creative ideas and service in 2009, Daniel is being awarded a Rookie of the Year award.



President's
Special Award
Jack Edwards



Rookie of the Year:
Ryan Smith, Daniel Reed & Lawrence Persky

Congratulations Goes To...

SEGMENTAL LEADERSHIP AWARDS

PROPRIETARY - KAT CLOUGH

Kat started in financial aid at Computer Learning Center in Springfield, Virginia in 1983. Finding that she absolutely loved it, she has remained in financial aid to this day. She is currently the Director of Financial Aid, a post she has held for 15 years, at Wyotech in Fremont. Kat has served on the Proprietary Committee for many years and is a previous recipient of the Proprietary Segmental Leadership Award in 2005. When she volunteered to take the chair of the Fund Development Committee, she broke all records for fundraising. It might even be said that she has become the favorite of all of our exhibitors and sponsors. In spite of health challenges, she has continued to serve CASFAA in many ways. She is a true leader (but prefers the behind-the-scenes activities).

GRADUATE and PROFESSIONAL ISSUES - TANYA GRIGG

Tanya started in financial aid 17 years ago! Can you believe it—she doesn't even look that old! She served as CASFAA Secretary for two years and has served on the Graduate/Professional Issues Committee for several years. She is currently the Associate Director of Graduate Financial Aid at Samuel Merritt University and says that she is very proud to assist with creating the new wave of health care providers! Prior to Samuel Merritt, Tanya worked at Heald College and Golden Gate University School of Law. She proclaims that she has the best husband EVER, a metal head 16 year old son and an 8 year old diva daughter. For her service to CASFAA on Graduate and Professional Issues as well as service on Executive Council, Tanya is recognized with the GP Segmental Award for 2009.

COMMUNITY COLLEGE - JACQUE BRADLEY

Jacque began as the Director of Financial Aid at Ohlone College and upon her employment there became a member of both CASFAA and CCCSFAAA. She is currently the Assistant Dean at Mendocino College where she has been since 2005. In addition to Financial Aid, Jacque supervises EOPS and CalWORKS. In 2006 Jacque served as Vice-President of CCCSFAAA and will be President in 2010. She has given above and beyond as a participant at Day at the Capitol. She has participated in the NASFAA Leadership Institute, the WASFAA Management Institute and the CASFAA Leadership and Management Institute. She represented CCCSFAAA on the CalWORKs State Advisory Task Force in 2007 and on the CASFAA Federal Issues Committee. For her representation community college issues to CASFAA, we award the Segmental Leadership Award for Community Colleges to Jacque Bradley.

CALIFORNIA STATE UNIVERSITY - DEAN KULJU

Dean is currently responsible for the leadership and direction of student financial aid services and programs at the CSU Chancellor's Office. Prior to that, he served as the Senior Director of Financial Aid and Administrative Operations at CSU Long Beach. He has been in financial aid for over 20 years having been at CSU Long Beach, 5 years at UC and 4 years at University of Washington (or UDUB as it is known in the biz). His current position provides administrative oversight of the SUG program (State University Grant to those not in the CSU system), management of the system wide database and data analysis, liaison with campus financial aid and business officers to provide guidance and facilitate policy review. He provides coordination for the audit of federal funds and for billing and collection services related to student loan programs. Anyone think this is one busy guy? For his service to the financial aid profession and especially the CSU segment, Dean is awarded the CSU Segmental Leadership Award.

INDEPENDENT - JONATHAN BROWN

Jonathan has been president of the Association of Independent California Colleges and Universities (AICCU) since 1991. Prior to that, he served as AICCU's Vice President. His career includes positions with the California Legislature, the White House, the U.S. Senate and House of Representatives where he served in a variety of policy roles primarily related to education and energy issues. His community activities assist Sacramento County, church offices and the Sacramento Opera Company. He has actively helped in fund raising for the University of the Pacific and was recently selected for the Education Cabinet for the Benerd School of Education at University of the Pacific (UOP). In other efforts, he has been an adjunct or visiting professor at University of Southern California (USC), Golden Gate University and a couple of unpronounceable universities, presumably in Mexico. He is a member of the board for the Tuition Plan, and served a term on the General Alumni Board of USC. With an AB with Honors from UOP, graduate studies at George Washington and Catholic Universities, a certificate from Harvard Institute of Educational Management, he earned a Doctorate in Public Administration from USC. His devotion to the Independent Segment is self-evident. He is married and has two grown children and one grandchild. For his work on behalf of the Independent Segment, CASFAA awards Dr. Brown the Independent Segmental Award for 2009.



**Segmental Leadership Award:
Kat Clough**



**Segmental Leadership Award:
Jacquie Bradley**

2009 casfaa award recipients (continued)

UNIVERSITY OF CALIFORNIA - ANDY PROMSIRI

Andy began financial aid at the University of California Los Angeles (UCLA) Financial Aid Office in 1982 when he was a junior under the work-study program. After graduation he worked in the central records, fiscal and counseling units and was promoted to front desk supervisor in 1989. In 2008 he accepted a position as Assistant Director at the UCLA Business School. He attended his first CASFAA in 1984 here in San Jose and has been an

active member ever since. He has served as Registration chair for CASFAA and WASFAA conferences and Institutes for many, many years (but who's counting?). When Ron Johnson signed Andy's WASFAA Summer Institute in 1984, Andy never thought that he would be working for Ron 20 years later—and a great relationship it has been! For his efforts on behalf of our CASFAA conferences, and his leadership in UC Segmental issues, Andy is awarded the UC Segmental Leadership Award for 2009.

COMMITTEE of the YEAR - CONFERENCE COMMITTEE

The 2009 Conference Committee was particularly challenged this year. The Committee knew coming into the process that budget cuts, reductions in staff, and the changes in the vendor community would make the creation of a successful, fiscally sound, and fun conference difficult. Well, they succeeded. They renegotiated contracts, limited printing, found more affordable entertainment options, and identified ways to still feed conference attendees. 🎓



*Segmental Leadership:
Andy Promsiri*



Committee of the Year: Conference Committee

Looking for a Job?

Look no further than
the CASFAA website.



Visit CASFAA's web site at
www.casfaa.org/Jobs/index.html
for information
about current job openings.

Looking to advertise a job?

EMPLOYERS: E-mail Linda Williams
(Director of Financial Aid at Sierra College)
at lindawilliams@sierracollege.edu
for more information on how to place
your job ad on CASFAA's website.

Minutes of the Executive Council



Jamie Shrode
CASFAA
Secretary
Then Wright
Institute

Executive Council Members

Present: Barbara Bickett, Joanne Brennan, Lindsay Crowell, Kentiner David, Addalou Davis, Lynn Fox, Sunshine Garcia, Yvonne Gutierrez-Sandoval, Kevin Hoover, Maureen Mason-Muyco, Denise Donn, Wayne Mahoney, Lawrence Persky, Beryl Schantz, Jamie Shrode

Others Present:

Dewayne Barnes, Gaby De la Vega, Colleen McDonald, Rhonda Mohr, Daniel Reed, Pat Robles-Friebert, Kim Thomas

Absent: Melissa Moser, Ryan Smith, Merilyn Sweet

Call to Order/ Introductions –

Yvonne Gutierrez-Sandoval, President (1:00 P.M.)

Training Update- Rhonda Mohr

1040 workshops –
Rhonda Mohr reported on behalf of Ryan Smith

Jim Briggs is holding the week of January 25th for a total of 4 tax workshops with two in the north and two in the south; one beginner and one advanced.

6 in-person IRS workshops anticipated to be conducted by the IRS throughout the year. No costs associated with these workshops other than for

beverages.

Discussion ensued regarding the cost to benefit of the Jim Briggs tax workshops, as the cost is significant.

Addalou suggested having Jim Briggs for Advanced 1040 workshops and IRS for beginner.

Wayne believes that 1040 sessions with Jim Briggs in January is too much too soon

Yvonne stated that the IRS will not address the business schedules and those are important to financial aid administrators.

Kevin reminded the EC to keep the Cal Grant deadline-March 2nd in mind.

Rhonda would prefer to have 8 to 10 weeks of time to alert the membership of trainings

Motion: It was moved and seconded that we reschedule the January 25th 1040 workshops to the week of March 15th. We will ask Jim Briggs to host two workshops in the north and two in the south: one beginner and one advanced to be held at each location.
Motion carried

TO DO – Ryan Smith to contact Jim Briggs to confirm week of March 15th availability and to begin working with Rhonda Mohr for necessary arrangements.

Nominations and Elections Committee Update-

Barbara Bickett
Barbara is chair of the

Strategic Planning Committee and is currently working to collect ballots for the special election. 2009 active members are to vote in special election, which closes December 22.

Treasurer – Wayne Mahoney
There is \$70 or \$80K approximately in the CASFAA checking account. Any outstanding conference bills will now be paid.

Confirm Appointed CASFAA Committee Chairs - Yvonne Gutierrez-Sandoval

Association Services
Coordinator – Dewayne Barnes
Training/Professional Development – Rhonda Mohr (subsequently replaced by Dewayne Barnes)
Electronic Initiatives:
Lawrence Persky, Wayne Mahoney
1040 Workshops – Ryan Smith
Archives – David Levy
Cash for College – Michael Dear
Communications – Pat Robles-Friebert
Conference Chair – Wayne Mahoney
Ethnic Diversity Training – Lawrence Persky
Federal Issues – Beryl Schantz
Fiscal Issues – Joanne Brennan
Fund Development – Merilyn Sweet
Grad/Prof Training - Sunshine Garcia
High School Issues, Chair – Angelina Arzate
Job Placement – Linda Williams
Management Institute – Rob Parisi
Membership Services/

Ambassadors/Volunteer Coordinator –Daniel Reed and Kim Thomas (Co-Chairs)
Mini Conferences – Kevin Hoover
Newsletter – Colleen MacDonald
Policies & Procedures – Addalou Davis
Proprietary Training – Kevin Hoover
Site Selection – Wayne Mahoney and Joanne Brennan
State Issues – Maureen Mason-Muyco
Strategic Planning – Barbara Bickett
Content Master – Pat Robles-Friebert
Web Master – Lawrence Persky

Motion: It was moved and seconded to approve the appointed chairs
Motion carried

Appointment of 2010 Independent Segment Representative - Yvonne Gutierrez-Sandoval

Susan Murphy, University of San Francisco

Motion: It was moved and seconded to approve Susan Murphy, University of San Francisco, as the Independent Segmental Representative.
Motion Carried

Federal Issues Update –

Beryl Schantz
Reminded those who will participate on Federal Issues Committee.
Discussion of a blast to the membership regarding the extension of ECASLA.

TO DO – Beryl will follow up with Yvonne regarding letter to

be sent on behalf of CASFAA regarding our support of an extension of ECASLA.

Discussion as to whether or not we should link members with their political representatives through zip codes. Discussion tabled.

Fund Development - Yvonne Gutierrez-Sandoval on behalf of Merilyn Sweet A company has been found that will host a silent auction online. The fee is approximately \$495 for a contract one year in length.

Motion: It was moved and seconded that CASFAA approve the use of the online auction company and forward necessary paperwork to president for signature. Motion Carried

Electronic Issues Update- Lawrence Persky Discussion regarding CASFAA joining WASFAA's webinar contract. The cost would be \$600 for one year.

Motion: It was moved and seconded that CASFAA approve the webinar contract with WASFAA for one year and a cost of \$600. Contract to be approved by attorney and signed by President once approved. Motion Carried

Discussion regarding social media options for CASFAA

Motion: It was moved and seconded that CASFAA utilize Facebook and Linked-In accounts as forms of social media to promote CASFAA's association activities to the

membership. Both Facebook and Linked-In accounts to include CASFAA's editorial policy as outlined in the policy and procedures manual. Motion Carried

Member Clicks - Lawrence will be attending Member Clicks online university to get up to speed on its workings. Transition to Member Clicks will occur in January.

Membership/Volunteer Update - Daniel Reed Need to quickly follow up with membership regarding volunteer opportunities.

TO DO - Kim, Dewayne, Lawrence and Daniel will coordinate communications to membership requesting top three desired volunteer options.

Discussion regarding whether postcard should be mailed out or sent electronically. Noted that there is a cost associated with mailing. It was suggested that we could mail out the postcard and follow up with renewal reminder(s) electronically. Should the renewal reminder be sent as an invoice per previous discussions? Perhaps an invoice format is too forward.

Motion: It was moved and seconded to approve "We Missed You" postcard to be sent in early January by regular mail. Motion Carried

TO DO - Daniel will send out postcard in Early January via USPS

Discussion of follow-up invoice tabled until next EC meeting,

in order to discuss other strategies for targeting those who have not renewed their CASFAA membership. EC to review WASFAA model of email communication.

Travel Coordinator - Yvonne Gutierrez-Sandoval Discussion regarding the possibility of having one person coordinate travel arrangements for members of the EC.

Motion: It was moved and seconded that the use of the CASFAA Travel Coordinator be optional. Motion Carried

State Issues Update - Maureen Mason-Muyco Committee conference call scheduled for December 22 at 3:00 pm

Day at the capitol discussion tabled until January meeting

CSU Update - Kentiner David CSU bear returned after long absence. It should be noted that the bear was returned with a few articles of clothing, but was brought to the EC meeting wearing none.

Newsletter Update - Colleen MacDonald January 14 is the next deadline for newsletter submission

Meeting Adjourned - Yvonne Gutierrez-Sandoval, President (2:58 PM)

Summary of Motions Motion: That CASFAA reschedule 1040 workshops, with Jim Briggs, from January to the week of March 15 Two workshops to be hosted in the north and two in the south

with one beginner and one advanced to be held at each location. Motion carried

Motion: To approve appointed chairs Motion carried

Motion: To approve Susan Murphy, University of San Francisco, as Independent Segmental Rep. Motion Carried

Motion: That CASFAA approve the use of an online auction company and forward necessary paperwork to attorney for approval and signed by President. Motion Carried

Motion: That CASFAA approve the webinar contract with WASFAA for one year's time and a cost of \$600. Contract to be approved by attorney and signed by President. Motion Carried

Motion: That CASFAA utilize Facebook and Linked-In accounts as forms of social media to promote CASFAA's association activities to the membership. Both Facebook and Linked-In accounts to include CASFAA's editorial policy as outlined in the policy and procedures manual. Motion Carried

Motion: To approve "We Missed You" postcard to be sent in early January through US Postal service. Motion Carried

Motion: Use of the CASFAA Travel Coordinator is optional. Motion Carried

Lost and Found CSU Mascot

a sign of positive things to come



Kentiner David
CASFAA CSU
Representative
California State
University Chico

I had just finished showcasing my rendition of Napoleon Dynamite's sublime disco moves on the crowded Saturday night CASFAA Conference dance floor when a teddy bear was shoved into my personal space. What? What is this? Is it for my dancing? Lawrence Pesky and Joanne Brennan, who had dazzled the crowd with their amazing hip hop dance grooves the night before, certainly had nothing on my Napoleon Dynamite moves, I thought for a moment. However, I was quickly snapped out of my soothing, self-aggrandizing thoughts. The messenger nonchalantly indicated that the bear was the lost CSU mascot. It was recently found in a random box in someone's garage, where it had lain, forgotten for years.

It had finally emerged from its forgotten box to once again claim the throne of CSU team mascot, the glue that supplied inspiration, hope, and good luck to team energy and spirit. According to Merriam Webster's Collegiate Dictionary, a mascot was a person, animal, or object adopted by a group as a symbolic figure to bring them good luck. I took this discovery as a good sign of things to come.



I found out later that his name was Casey, but I liked to call him Casey Dinsmore. He was born for one single purpose, his *raison d'être*, to be the CSU bear. He was born in November 1991. That was the year I finally transferred to CSU, Chico from Lassen Community College to begin my Chico experience.

Casey was brown, shaggy, curious, and wore numerous pins and various clothing articles left to him by the many CSU caretakers over the years. I could not recognize the rainbow of colors he was sporting, even when I squinted. However, I quickly realized that Casey was not wearing any colors remotely representative of my CSU campus, CSU, Chico. My tribal sentiments got the best of me and I quickly disrobed Casey. I wanted to get him into maroon Chico colors. After all, Chico was his new home. Casey, without his rainbow of color, and I hung out for the rest of the CASFAA Conference. He even sat on shoulders, on stage, while I ate breakfast during the Monday morning CASFAA business meeting.

One evening, a few days after the CASFAA Conference, leisurely walking home, and reflecting on things, I had an epiphany: Casey was the mascot for the CSU Segment, not just for CSU, Chico. Wow! How could I have missed that so important and encompassing concept? It was not all about Casey and me! I realized that Casey and I were representing a much larger team and accountable to it. When I got home, I quickly reintroduced Casey to his pins and clothing articles. Good thing, I had left them in my luggage.

As the new CSU segmental representative for 2010, I was happy Casey was found. I took it as a good omen. After all, I believed a team's mascot symbolized the best of its energy and spirit. I was a new volunteer and I needed all the tangible and intangible help I could find. I wielded the power to control my hard work, commitment, and creativity, but I had no discerning effect on the landscape of luck. Casey would be my



calming companion on this landscape.

Casey and I need the support of each and every CSU segmental member to achieve our 2010 CASFAA goals. We have many goals, but these are the ones we most definitely need help with: (1) To increase, improve, and facilitate communication with the CSU segment, (2) To increase CASFAA membership for the CSU segment, (3) To properly represent the CSU on current issues facing our profession and environment.

Casey and I will need your help to accomplish the above goals. We ask that you participate on our CSU segmental committee. The more people we get on the committee, the broader the perspective, and the more likely we are to implement popular, meaningful, and effective change. CASFAA is our professional organization and it is only as good, effective, and strong as the level of effort, dedication, and creativity we put in. I ask you to please join Casey and me in accomplishing our goals and making our professional organization, CASFAA, shine like a lighthouse in this foggy and stormy ocean of economic woes and myriad regulatory complexities. We can serve as an example for similar organizations. 🏠

It's the age of Social Media

casfaa is now on facebook!



Lawrence Persky
CASFAA Webmaster
University of California
Los Angeles

Greetings my fellow CASFAA members and welcome to a new and exciting year! I can tell you that I couldn't wait for 2010 to begin because I have several new and creative ideas for CASFAA in regards to my duties as Electronic Initiatives Chair. The first new thing to announce for 2010 is that CASFAA is now on Facebook!

Joining the Facebook community is a big step for CASFAA towards electronic modernization. CASFAA's presence on Facebook will allow CASFAA to be showcased to over 300 million Facebook

members, as well as provide a new means to update existing CASFAA members on current events, upcoming projects, and provide a new and direct means of communication.

Becoming a part of the new CASFAA Facebook group is quick and simple.



After you log into Facebook, just visit the 'Groups' section of the site. From there, search 'CASFAA' and click on our group page. Once on our page, you can elect to join the group, post a message on our wall, start or expand on a discussion thread, view CASFAA photos (coming soon), and much, much more!

As always, we're open to new and creative suggestions. If after viewing the CASFAA group page on Facebook you think there are ways to improve it or there is something we left out, then let me know by either sending me a Facebook message (I'm an administrator to the group) or an email at lpersky@saonet.ucla.edu.

Hope you join the CASFAA Facebook group! 📧

CASFAA Needs You

volunteer for casfaa in 2010



Kim Thomas
CASFAA Volunteer
Committee Co-Chair
NSLP

Volunteering for CASFAA is an excellent opportunity to meet and converse with fellow professionals throughout the state. You can participate at whatever level you like, and at the time commitment your job allows. Volunteers are needed for all sorts of things like taking minutes on conference calls to planning training events to staffing events in your geographic area.

If you've ever had aspirations of chairing a committee or are just interested in becoming more involved in CASFAA, now is the time. Visit the www.casfaa.org to



Daniel Reed
CASFAA Volunteer
Committee Co-Chair
Point Loma Nazarene
University – Mission
Valley

complete your volunteer form. You can rank your top three areas of interest by updating your membership profile today. Don't wait, the time to volunteer is now!

Volunteer your time and knowledge! In the first months of the year, Cash for College workshops will be conducted in your area. This is a great opportunity for financial aid administrators like us to share our financial aid expertise and help students get their FAFSAs filed on time. Your volunteer interest can be sent straight to the Cash for College committee. Please don't forget

to update your membership profile on the CASFAA website after completing this form.

If you can't volunteer at this time, we will let you know about other opportunities throughout the year. 📧

We Need you!



TRAINING CALENDAR

CASFAA Beginner 1040 Training with Jim Briggs

Mar 15 Samuel Merritt University, Oakland, CA
Mar 18 Claremont Graduate Institute, Claremont, CA

CASFAA Advanced 1040 Training with Jim Briggs

Mar 16 Samuel Merritt University,
Oakland, CA
Mar 19 Pitzer College, Claremont, CA

EdFund

Feb 16, 17, 18, 23, 25 Webinar

Great Lakes Financial Aid Training

Feb 16, 18, 25 Webinar
Mar 2, 11, 18, 25 Webinar

NSLP Financial Aid Training

Feb 24 Mar 31 Webcast

TG Financial Aid Training

Feb 18 Webinar

TG Financial Aid Workshop – Fed Update, Fin Lit, IBR

Feb 23 San Diego, CA
Feb 24 Norwalk, CA
Feb 25 San Leandro, CA

US Department of Education 3 Day Direct Loan Training

Feb 16-18, 23-25 Webinar

US Department of Education Year Round Pell

Feb 19, 22, 26 Webinar

USA Funds Financial Aid Training

Feb 16, 17, 18, 23, 25 Webcast

THE NEWS DOESN'T STOP HERE.



Head over to our website for expanded content and helpful links including a wide variety of training events, job listings and up to the minute articles.

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A Recap of our January EC Meetings

we want you in the loop!



Yvonne Gutierrez-Sandoval
2010 CASFAA President
Pitzer College

If you attended the conference, you know what a great one it turned out to be! If you weren't able to attend, we missed you, but look forward to seeing you next year at the Manchester Grand Hyatt in San Diego. We are trying to gather up all the handouts from the conference and get them posted to the CASFAA website, so be patient and we'll get them on there.

On January 12, the new CASFAA Executive Council held a teleconference. We are trying this method for some of our meetings this year in order to save our association the cost of having all of the meetings in-person. We will be having an in-person meeting on January 31. If you have any issues or items that you would like your council to discuss, please send them to me at Yvonne_gutierrez@pitzer.edu or to any member of the Executive Council.

The "hot" item that came up during our teleconference was the SAFRA (Student Aid and Fiscal Responsibility Reform Act) and how it will affect our offices, our schools and our students and parents. CASFAA has sent letters to Congress and the letters will be posted on the website. However, we are going to be sending an updated letter and will hold off posting the prior four letters until the new one is prepared, voted on and sent. You will be notified when the letters have been posted. We encourage CASFAA members to contact their member of Congress and our Senators (Boxer and Feinstein) regarding timing of the Senate's legislation. Many of us are confused and concerned and our elected representatives need to know that if we are confused, you can bet our students are in panic mode! You can use our letters as a guide for writing your own letter, but it is always best to include your own anecdotal information. The more



letters they receive, the more attention our concerns get.

Our committees are looking for new volunteers—it is time to get some "new blood" into our committees with fresh ideas, new enthusiasm and great input. Please visit the CASFAA website at www.casfaa.org and look for the volunteer form. You can indicate your preferences (at least 3) so that we can get you assigned, get your sleeves rolled up and get 2010 moving forward. We look forward to having new participants this year!!

Look for information about the ever-popular 1040 Workshops starring Jim Briggs. The sites and dates are being finalized right now and information about registration and the cost to attend will be sent soon. There

will be four sessions: one Beginner and one Advanced in the North; one Beginner and one Advanced in the South. They are being scheduled for the week of March 15th, so mark your calendars.

CASFAA has a Facebook page and everyone is invited to join. Also, CASFAA will host the annual Day at the Capitol in May, so watch

for information about that great event. This may be especially important this year because of legislation proposed by the Governor that asks for a constitutional amendment and the elimination of competitive Cal Grants. We'll get the information to you as soon as the agenda and plans are final.

In closing, I hope you are having a wonderful New Year and that you will contact your Executive Council members, your segmental representatives or me with your ideas for our association. Also, we hope that you will make a visit to the CASFAA website for calendar updates and other important information—frequently! There is lots of information there. We will also send our "blasts" when new information is posted. 📧

Federal Tax Training

for financial aid administrators

CASFAA Beginner 1040 Training

Mar 15 - Samuel Merritt University, Oakland, CA
Mar 18 - Claremont Graduate Institute, Claremont, CA

CASFAA Advanced 1040 Training

Mar 16 Samuel Merritt University, Oakland, CA
Mar 19 Pitzer College, Claremont, CA

For more information contact
rysmith@kaplan.edu

\$75 Members \$150 Non-Members

with Jim Briggs,
the "Tax Detective"



Transitions & Announcements



Colleen MacDonald
CASFAA News Editor
EdFund

In each issue, CASFAA News honors our members and their schools by sharing the news about momentous achievements, announcements and transitions:



Beth Asmus, past president of the California Community College Student Financial Aid Administrators

Association (2006-2008), former Director, Financial Aid & Scholarships (1979 to 2006), and current Dean, Special Programs (2006 – present) has announced her retirement after a thirty-three year career at College of the Canyons. Beth was a former recipient of CASFAA's Segmental Leadership and Project of the Year awards.

Fred Eckert, a long-time member of the financial aid community, passed away December 23, 2009, after a battle with cancer. He was an innovative leader in the student loan industry through his leadership at Citibank, PNC Bank, and as a founding member of ELM Resources. Fred was also a decorated Vietnam veteran, serving in the US Army and the New York State National Guard as a helicopter pilot, and retiring as a full Colonel. As well as serving

students across the nation, Fred's passions included fly-fishing, which enjoyed avidly in Florida, where he retired. He will be missed by his many friends and colleagues in the financial aid community.

Congratulations to **Maureen McRae**, Director of Financial Aid at



Occidental College and her partner, Gary Goldberg, on the birth of their twins Garrison Saul and Grace RoseAnne born November 11, 2009.



After working for over 11 years at EdFund, **Rhonda Mohr** recently accepted a position working with the California Community College Chancellor's Office. Susan Taylor, an EdFund colleague wrote that, "We laughed in the good times/ We cried in the sad/ But with Rhonda around/ It was never that bad." Although her Edfund colleagues will miss her regular interactions, everyone is excited that she will be continuing to work in the field that means so much to her.

Anna Rushton graduated from CSU, Chico in spring 2007 with a BA in Anthropology and an emphasis in Cultural Anthropology and African Studies. Upon graduation, she joined the CSU, Chico Counseling



and Wellness Center, where she worked for a little over a year. Recently, CSU, Chico Financial Aid Office were very happy to announce that Anna has joined their staff as a Financial Aid Analyst.



Chris Trowbridge graduated from CSU, Chico in 2000 with a BA in Religious Studies.

He continued on at CSU, Chico to receive a MA in Public Administration. After completing his graduate studies, Chris joined the Tehama and Butte County Offices of Education, where he worked for a year. The CSU, Chico Financial Aid Office is very happy and lucky to have Chris join their staff as a Financial Aid Analyst.

Jenny Pak Vincent is working with the Corinthian corporation (CCi) to help them open new campuses.



In her 5 years at EdFund, Jenny was a great asset to the Southern California team. She will be sorely missed at EdFund because she was always productive with clients, supportive of her colleagues and always willing to go the extra mile. Congratulations to CCi for getting such a great team member.

It's a Different Time with Fewer Resources

alternatives must be explored



Greg Ryan
CASFAA News
Columnist
Fullerton College

El Niño has officially hit as I write this and it's been raining for days! Spring semester, for my school, began this week and the usual lines are occurring despite the rain. My major accomplishment for the fall was to get ready for Direct Lending, so we are now "ready." Attending the fall conferences really put me at ease and I feel a lot more comfortable with the transition. It was a great experience to network with former colleagues - including former bosses! The weather was cold, but hey, I was inside most of the time.

I am excited for the possibilities of the IRS Data Match and hope it solves some of the verification volume that we are faced with. As we face another tough budget year, I have been working to automate more processes in our office. I am pleased to report that we just went live with an automated book advance process. Our book advance is a \$400 advance on the



Pell Grant for eligible students. In prior semesters, students lined up outside financial aid to complete a piece of paper. Starting this spring, they log in to the financial aid portal, complete the form electronically, agree to the terms and submit it, without a need to come in to the office. It's working well and we have done 2000 so far in a little over a week. That's 2,000 people out of our line who did not have to come in yet again.

I am curious to find out what it is you are doing differently, whether that be automation of a manual process, changing past office policies, etc., to deal with increased lines, fewer staff, and greater demand for services. If you'd like to share your story, please email me at gryan@fullcoll.edu. Happy 2010 and here's to a productive semester! 🍀

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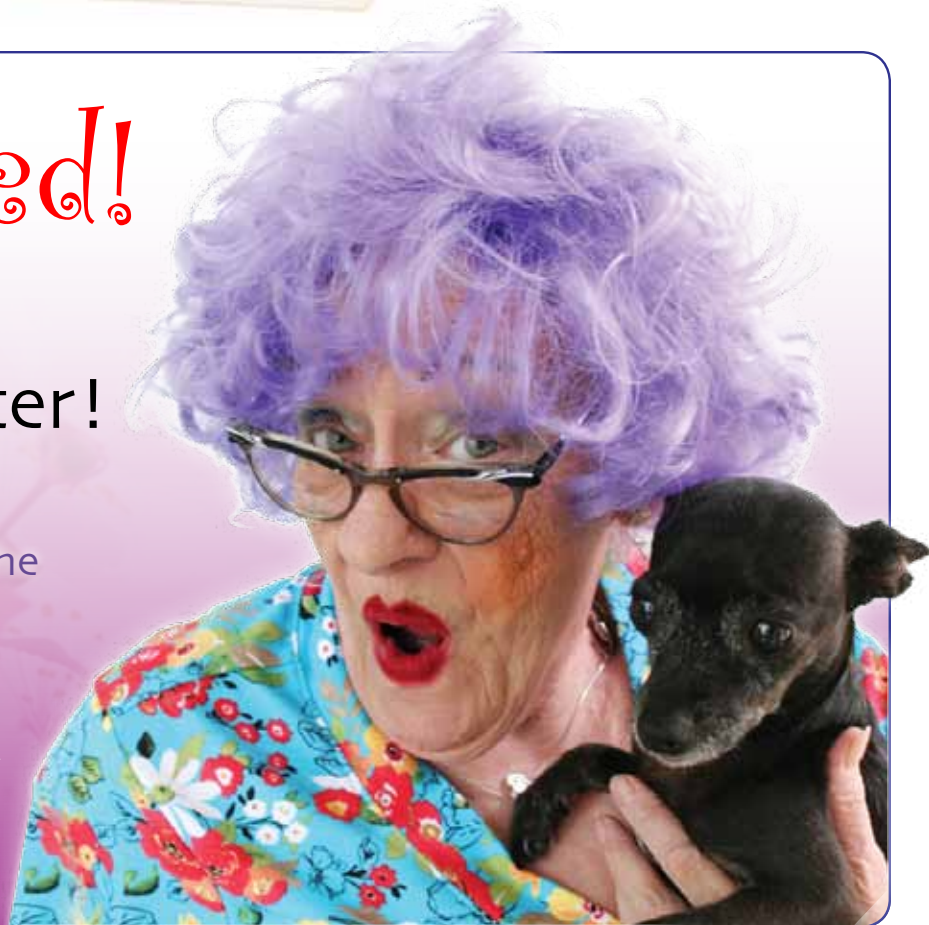
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A Unique Economic Season

it's time to think outside the box



Marilyn Sweet
CASFAA Fund
Development Chair
NTMA Training Centers

Wow, its 2010 and here we are again! It was not too long ago when my committee was forming, brainstorming and trying to come up with revenue-producing programs to help our organization fund our outreach efforts. Yes, without funding, we will be limited on implementing other projects to support our CASFAA members with trainings.

Lenders, guarantors and servicers were large supporters of CASFAA and its mission. These partners had budgets specifically for supporting CASFAA and the annual conference through exhibiting and various other diverse sponsorship activities. Supporting other CASFAA endeavors, like mini-conferences and other trainings was also a priority. Today's situation is quite different from the past. Several of our partners are no longer in the business and those remaining have reduced or trimmed

back staffing and support. It is to the point where continued exhibiting and other sponsorship will be drastically reduced or eliminated by the remaining partners. Reduced staffing also means less support at the conference and other training events. If legislation officially passes, moving all loan volume to Direct Lending, lender partnerships will most likely become non-existent. This directed us to think outside the box for other means to support our ongoing projects and trainings.

With this at hand, we'd love to hear from you and will be glad if you can join our team to put together revenue-producing ideas to keep us going in this unique economic season. With the help of our very own Toni Litke, we came up with the idea of an Online Auction. You can participate by one of the following:

Donating items for our online auction
Connect with and/or

identify potential sponsors
Volunteer your time by joining our committee

The auction is scheduled to take place close to December 2010 and is a great opportunity for our members and friends to assist in helping CASFAA continue its vision for training, mentoring, leadership and professional development. Stay tuned for details on how you can contribute!

We have three other fund development programs in the making. Once approved by the Executive Council, you will be hearing about them from us in our next Newsletter!

Lastly, if you would like to volunteer, please email me at ymarilyn@gmail.com and I will be happy to welcome you on behalf of our committee! 📧

