CASFAA NEWS
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visit us online at: www.casfaa.org

Enhancing the Campus Visit Experience for Prospective Students

Amy Kasper
TG Regional Account Executive

Choosing a college is a big decision. Students have many options, and making the best choice can have a positive influence on their lives for years to come.

Providing students with all the information they need and encouraging them to ask helpful questions can be a significant challenge. Counselors, teachers, family members, and friends may already be influencing them on their decisions, and it's your job to have a voice in that conversation. Luckily, these same influencers often encourage students to take tours of college campuses they are considering to help them narrow their choices and feel confident about their eventual school selection.

Here are a few factors to consider when supporting students as they visit your campus:

Before the Visit

Establish or revisit your campus recruitment plans with an eye for understanding how students and their guests (parents, siblings, relatives, or friends) experience the visit. Review the materials your school provides to prospective students on a regular basis. Find out what information would be helpful for them to successfully plan a visit, and prepare or update your visitor's planning packet. If possible, create sample visiting schedules based on students' interests. For example, grouping students together to visit specific academic departments allows you to more efficiently handle multiple campus visitors; this also introduces them to potential peers with similar interests.

During the Visit

Consider using student guides to tour visitors through your campus. Visitors may be more comfortable asking realistic questions of current students than they would of college staff members – they may see students as providing a more accurate picture of the campus experience. Encourage students as much as possible to participate in ongoing conversations and encourage them to ask questions about your school.

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CASFAA News is an official publication of the California Association of Student Financial Aid Administrators.

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STAFF
Newsletter Editor
Daniel Reed
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Copy Editors
Angelina Arzate, *Palomar College*

Jamie Shrode,
Haas School of Business, UC Berkeley

Beth Violette, *Heald College*

Graphics/Layout Coordinator
Scott Telkamp, American Direct Mail

Contributors
Special thanks to our Contributors:
John and Debby Anderson
Bob Brower
Luanne Canestro
Sunshine Garcia
Amy Kasper
Anita Kermes
Kelly Kilby
Sheryl Ross-Mahoney
Lily Ana Marquez
Melissa Moser
Sun Ow
Greg Ryan
Carole Ann Simpson
Craig Yamamoto

If you would like to submit an Article, please visit our website.

Guidance on Pell Grant Award Process Changes

Carole Ann Simpson
Consultant, School and Student Services
USA Funds

The U.S. Department of Education issued information about Federal Pell Grant award process changes that are the result of the Department of Defense and Full-Year Continuing Appropriations Act. The USA Funds Ask PolicySM experts highlight the following key points of the Pell Grant award process changes from Dear Colleague Letter P-11-02:

Two Pell Grants in an award year

The new law eliminates the option to award up to two Pell Grants to a student in one award year. Students who are eligible for two Pell awards may receive Pell funds that exceed one scheduled award if those funds would come from the 2010-2011 award year.

Summer crossovers

- If a student's summer crossover payment period would be assigned to the 2010-2011 award year, then that student may be eligible for a second Pell Grant. (The student must, of course, meet the other eligibility requirements associated with "two Pells.")
- If the student's Pell award for the summer crossover period would be assigned to the 2011-2012 award year, the student is not eligible for a second Pell Grant.
- A school may choose the award year from which to award the crossover Pell. The school is not required to comply with the Institutional Student Information Record comparison provisions that otherwise dictate the year from which the school must award the Pell Grant. The Department is waiving the ISIR comparison provisions for this summer's crossover period only.

Additional notes

- The Pell payment and disbursement schedules issued by the Department in February remain in effect for the 2011-2012 award year.
- The Academic Competitiveness Grant and National Science and Mathematics Access to Retain Talent Grant programs expire on June 30. Because the 2010-2011 award year is the last year for which a school may award these grant funds, a school awarding ACG or SMART Grant awards and Pell Grant funds for a 2011 crossover payment period must assign them to the 2010-2011 award year.

Send email to askpolicy@usafunds.org to submit questions about this information or other specific issues related to federal student aid.

FERPA and Your Students

a beginner's guide

Sun Ow
Senior Marketing Associate
Great Lakes Educational Loan Services, Inc.

For schools, the Family Educational Rights and Privacy Act of 1974 (FERPA) details the transfer of rights to access educational records–from the parents of your students to the students themselves. Under FERPA, all education records (except directory information, in most cases) are confidential, and cannot be disclosed unless the student consents or the request fits an exception outlined by FERPA.

While FERPA is a complex regulation that requires research, here are a few things schools must know:

Know the Student's Rights

In addition to restricting disclosure of a student's records without consent, the FERPA provides several rights to students with regard to their education records, including the right to access, review, and request amendment of their education records. FERPA also gives students the right to file complaints against the school for disclosing education records in violation of FERPA.

Know the Parents' Rights

Unlike students, parents do not have automatic access to their child's education records even if their students are dependent students. There are a few instances that do allow access to parents, including if the student has provided written consent.

Know Your School's Responsibilities

There are steps that schools must take to ensure that they are complying with FERPA:

- School faculty and staff must have a legitimate educational interest to view a student's record, or meet an exception outlined by FERPA.
- Know your definitions. FERPA defines: school, eligible student, attendance, dates of attendance, disclosure, and the different types of records and student information.
- The school must respond to a student request to view education records by:
    - Providing copies of applicable education records within 45 days of the receipt of the request. Exceptions are outlined in FERPA.
    - Not charging a fee for the record search. The school may charge a copying fee.
- Know what to do when a student asks to amend a record. The school must:
    - Decide whether a record will be amended within a reasonable timeframe.
    - If approved, amend the record as requested.
    - If denied, inform the student or parent of their right to a hearing
    - Allow the student or parent to insert a statement in the record, if denied after the hearing.
- Notify students in attendance of their FERPA rights annually.
- Review campus policy annually.

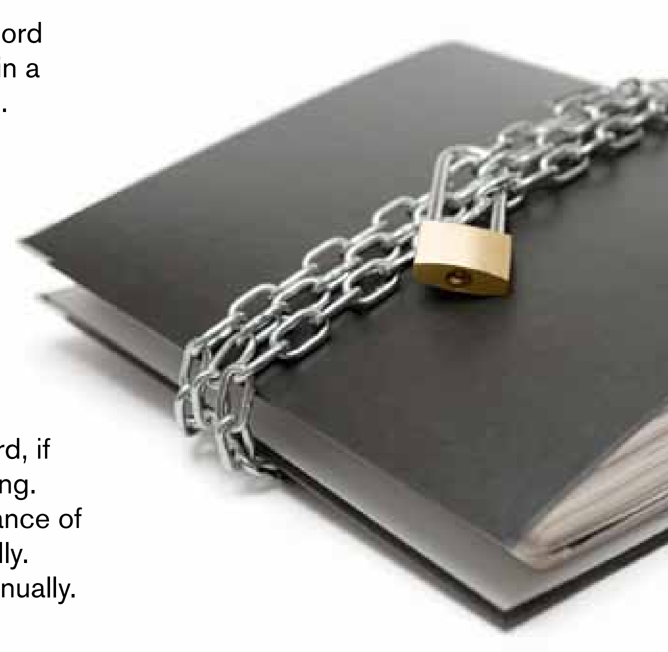
Know Where to Learn More

FERPA compliance help is available. You can email your compliance questions to the U.S. Department of Education at *ferpa@ed.gov*. FERPA information is available from several sources:

- *Ecfr.gpoaccess.gov*
- *http://ifap.ed.gov/fsahandbook/1011FSAHbkVol2.html*
- *IFAP.ed.gov*
- *Ed.gov/policy/gen/guid/fpco/ferpa*
- *Aacrao.gov/compliance/ferpa/index.cfm*
- *NASFAA.org*
- *Clhe.org*

You may also wish to consult your campus legal counsel, as this article is intended to provide general FERPA information only.

By following these guidelines, and becoming familiar with FERPA, schools can ensure that the privacy of students' confidential education records is protected.



Financial Aid Automation

automating verification

Greg Ryan
Fullerton College

As you all know by now, we are in the second year of the IRS Data Retrieval process. Our campus did not really utilize this feature in the 10/11 award year, but with the expanded options for 11/12 and the fact that students can now make corrections and agree to the Data Retrieval, we are using it for 11/12.

Our campus uses Banner, so what we have done is when we import ISIRs into our system, any student who has the appropriate code that states the student (and/or parent) agreed to the IRS Data Retrieval, matched and was not changed, will have the Student (and/or parent, as application) tax return requirement and W2's marked as "waived" in our system. When students log in to our student portal, they see the tax returns and W2's are not needed, and they only need to access and submit the applicable Dependent or Independent Verification form.

For students who see open tracking requirements, and have not yet agreed to the Data Retrieval, a hyperlink is provided which encourages students to go back to *www.fafsa.gov* to make a correction and agree to the IRS Data Retrieval, then log back in to the student portal in three days to ensure the requirement is now waived. They are encouraged to do so for quicker packaging and file completion. Alternatively, students are given the option to bring copies of their entire Federal tax return and W2's to our office as was the norm, however our office will no longer make copies of these documents for students.

This has allowed us to process files much faster than in prior years. Already, we have awarded 2,000 more students in May 2011 than we had completed in August of 2010. Coupled with the new early disbursement requirements, we will be able to get funds to more students the first week of school than we ever have in the past. It has also cut down on lines and student inquiries at our office, since they are seeing their awards sooner and with fewer backlogs than the previous year. If you have automated any processes at your campus, I'd love to hear about them, and possibly include them in a future article. You can email me at *gryan@fullcoll.edu*.

A University President Speaks Out

POINT LOMA
NAZARENE UNIVERSITY

Office of the President
Bob Brower, Ph.D.

May 27, 2011

The Honorable Susan Davis
U.S. House of Representatives
1526 Longworth HOB
Washington, DC 20515

Dear Congresswoman Davis:

Thank you for your work to preserve the Pell Grant funding in the recently approved budget. On behalf of our students, I encourage your continuing support to keep the Pell Grant funding at the $5,500 level in this year's budget negotiations.

As a first generation college student from a family with little means, the federal grant I received during college provided me the opportunity to attend college and complete my degree. That single opportunity changed the course of my life forever and I am deeply grateful. Today, I want to encourage you, on behalf of the 600 PLNU Pell Grant students, to help preserve this life-changing educational experience that is provided through the Pell Grant. The Pell Grant students of PLNU are hardworking, low-income, often first generation students who have aspirations for opportunity and success. Pell Grant students generally work part time or participate in work study as they earn their way through.

PLNU's financial aid office works closely with each student to design an aid package of available grants, scholarships, university tuition aid, and loans to make attendance possible. We strive to build responsible loan and financial behavior and as a testament to this careful financial counseling and life preparation, PLNU has a student loan default rate of 2%. PLNU students have significant financial need and PLNU provides aid to 72% of our students as we share in the investment in the future with others. This institutional support, combined with the Pell Grant and other available aid, enables these 600 students to attend PLNU. The investment of these resources is a good one at PLNU, as nearly 75% of our students graduate. Without the Pell Grant, the educational opportunities of hundreds of our graduates would be at risk every year.

At your convenience, we would welcome the opportunity to visit you in your district office and introduce you to some of our exceptional Pell Grant students or answer any questions you and your staff may have. Thank you for your continued commitment to the educational resources of the nation and to these PLNU students.

Positively,

Bob Brower

Bob Brower, Ph.D.
President

Cc: Congressman Brian Bilbray; Congressman Bob Filner
Congressman Duncan Hunter; Congressman Darrell Issa

3900 Lomaland Drive • San Diego, CA 92106 • Phone: (619) 849-2216 Fax: (619) 849-7007 • bbrower@pointloma.edu www.pointloma.edu

CALIFORNIA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
3200 FIFTH AVENUE, SACRAMENTO, CA 95817

May 26, 2011

Mr. Mufaddal Ezzy
Higher Education Policy Consultant for Senator Darrell Steinberg

Dear Mr. Ezzy,

Thank you for meeting with representatives of the California Association of Student Financial Aid Administrators (CASFAA) who represent more than 1,000 financial aid administrators representing over 500 postsecondary institutions of higher education; we appreciate your availability in these busy and difficult times. We explained to you that we believe there is a minor flaw in the SB 70 (trailer bill) language as it relates to Cal Grant income and asset ceilings for renewal eligibility. You indicated the intent of the Legislature was to protect the 'neediest of the needy' by making reductions at the upper margins of the income and asset levels. While we wish these reductions were not necessary, we understand the grim budget reality and will do our part to implement these changes, but we do hope a minor change can be approved to protect some very needy students.

The problem: A student with a 3.0 or better GPA from a very low-income family will be determined eligible for *both* a Cal Grant A and a Cal Grant B at the time of initial review. The student is given the option to choose the program that best serves his/her needs. Students in UC and private colleges are often advised to accept the Cal Grant A, as it pays more money over 4 years at these more expensive institutions. A student attending CSU or a community college will typically be advised to choose Cal Grant B, as this will pay more money.

Now that SB 70 is being implemented, the California Student Aid Commission has announced that students who chose a Cal Grant B will be held to the lower income and asset standards for renewal and can no longer be considered under the higher ceilings under which they originally qualified. The student who chose a Cal Grant A is protected; the student who chose a Cal Grant B loses. Here is the exact guidance provided by CSAC:

> 9. If a Cal Grant B renewal student does not meet the minimum need and income/asset ceiling requirements for a Cal Grant B in the renewal year, but does meet the requirements for a Cal Grant A in the renewal year, can the student receive a Cal Grant A?
>
> If the student has already received payment under the Cal Grant B program, the student's award cannot change to a Cal Grant A. Renewing Cal Grant students may change their awards from a Cal Grant B to a Cal Grant A only if the students have not received payment on the Cal Grant B and the award year is still open.

This is an inequity, not reflective of legislative intent to protect the neediest students. A student with a 3.0 GPA whose family made $70,000 and now makes $72,000 may continue to receive tuition benefits. A student with a 3.0 GPA whose family made $40,000 and now makes $42,000 will lose his/her grant. We understand the student will lose the Cal Grant B access portion of their grant (because he or she no longer qualifies under those income standards) but it is not fair for this student to also lose the tuition benefits for which he or she originally qualified and for which he or she remains qualified.

We have enclosed a copy of the relevant language in SB 70 with a suggested fix. We're sure this language needs some tweaking, but we hope our intent is clear...let's protect the neediest students in these hard times.

We cannot give you a cost estimate, but we believe CSAC is nearing the point at which that estimate might be available. We hope you will work with us and with CSAC staff to cure this problem for our neediest students. Please let us know if we can provide history, technical information, further explanation or any other assistance.

Sincerely,

Craig Yamamoto
Vice President, State Issues
California Association of Student Financial Aid Administrators

S. Lynn Fox
President
California Association of Student Financial Aid Administrators

Enclosure: SB 70 recommended language

cc: Diana Fuentes-Michel, CSAC Executive Director

The requested modification:
…An applicant or renewal recipient who qualifies to be considered under the simplified needs test established by Federal law for student assistance shall be presumed to meet the asset level test under this section.

A recipient who initially qualified under both Cal Grant A and Cal Grant B and received a Cal Grant B may be awarded a renewal Cal Grant A, if that recipient meets the applicable Cal Grant A maximum household income and asset levels.

Prior to disbursing any Cal Grant funds, a qualifying institution shall be obligated, under the terms of its institutional participation agreement with the commission, to resolve any conflicts the may exist in the data…

USA Funds Ask Policy — Answers to Your Policy Questions in 24 Hours

USAFunds®

Finding the answer to a specific student aid policy question can be time-consuming. USA Funds® Ask Policy℠ eases that burden by addressing your questions about specific federal student aid policies. Our policy experts generally respond within one business day, with answers that include regulatory citations and other supporting resources.

Email your federal student aid policy questions to *askpolicy@usafunds.org* for a definitive answer — within one business day.

Financial Literacy Messaging

communicating across generations

Amy Kasper
TG Regional Account Executive

Financial literacy training is an increasingly important cultural component for schools addressing issues such as persistence and high cohort default rates. With nontraditional students, career changers, and students who take longer than the typical time to complete their academic degrees, college campuses can host multiple generations of students in need of financial literacy information pertinent to their specific circumstances. While the clarity and accuracy of the information shared with students is vital, not all approaches appeal to and hold the attention of students from diverse generations.

As some students return to college campuses in response to the changing environment or with the goal of beginning a new career later in life, they may need to build financial literacy skills to support their efforts at transition. Those who fall in the baby boomer category (who were born, roughly, between 1946 and 1964) may have different communication styles than their more contemporary counterparts. Grabbing – and keeping – their interest may be best accomplished face-to-face. Often perceived as a more social, hands-on generation, engaging this group in roundtable discussions, open brainstorming sessions, and frank Q&A assemblies can be just the sort of approach to relay important concepts and messages, as well as to gather information about the kind of financial literacy support they are seeking.

Students born between 1965 and 1980, members of Generation X, may tend to communicate in a radically different mode than their boomer counterparts. Although it's a broadly painted statement, Generation X students can be less likely to align with the group as a whole, preferring instead to communicate in a quick, no-frills method. Technically savvy and eager to get things done, members of Generation X grew up on sound bites and buzz words. With this group, less may often be more. Quickly digested, bulleted financial literacy presentations can help keep their interest from wandering, and at-a-glance Web-based resources may help keep your messages in the front of their minds.

Currently the generation with the most traditional college age students, Generation Y (sometimes called the millennial generation) comprises members born between the years 1981 and 2001. Communicating with Gen-Y students may require using communication skills effective in exchanging ideas with boomers and members of Gen X. While they are tech-savvy like their Gen X counterparts (many Gen Y students have never known a world without electronic communication) the ubiquity in messaging provided by mobile and hand-held devices has helped shape this generation into one that may value a team-based approach more than members of Gen X. Invitations to financial literacy

training events sent via text messages or social media sites might be more likely to be noticed.

Amy Kasper is a regional account executive with TG serving schools in CASFAA. You can reach Amy at (800) 252-9743, ext. 6739, or by e-mail at amy.kasper@tgslc.org. Additional information about TG can be found online at www.tgslc.org.

USA Funds Ask Policy Advice

three key points on irs data retrieval process

Sheryl Ross-Mahoney
USA Funds Senior Policy Specialist

The IRS Data Retrieval process allows online FAFSA filers to pull directly from the Internal Revenue Service their tax return data to complete the form. USA Funds Ask PolicySM recently has received many questions about this process – so I want to share three key points to keep in mind about IRS Data Retrieval.

1. Types of data included.
Currently, the IRS Data Retrieval process collects these fields of data to include in the Free Application for Federal Student Aid:

From 1040 forms other than 1040EZ or 1040EZ-NR:

- Type of tax return filed.
- Adjusted gross income.
- Taxes paid.
- Exemptions.
- Education credits.
- Individual Retirement Account deductions.
- Tax-exempt interest income.
- Untaxed IRA distributions.
- Untaxed pension.

From 1040EZ or 1040EZ-NR forms:

- Type of tax return filed.
- Adjusted gross income.
- Taxes paid.
- Exemptions.

2. Implications for verification.
The IRS Data Retrieval process also affects the verification process for a student who retrieved tax information when completing the FAFSA.

If that student's ISIR (Institutional Student Information Record) or SAR (Student Aid Report) lists a 02 IRS Request Flag, then the retrieved IRS information is unchanged. You can accept that information and do not need to collect tax forms. Note that for a dependent student, both the student and the parent will have IRS Request Flags.

3. Why it's important for 2012-2013.
Especially beginning with 2012-2013, I encourage you to promote the use of the IRS Data Retrieval process among your students and their parents.

Here's why:
Starting with the 2012-2013 award year, for students and parents who opt not to use the IRS Data Retrieval process and who subsequently are selected for verification, schools will be required to obtain the tax information – tax transcripts – directly from the IRS. This could lead to some long delays in processing. You're much better off if your students and parents take advantage of the IRS Data Retrieval process.

If you have any other questions about the IRS Data Retrieval process – or any other student loan policy or financial aid policy questions – please just send an email to USA Funds Ask Policy. We're at askpolicy@usafunds.org. You'll get a quick response – we generally respond within a business day.

IMPLEMENTATION REMINDER –

Release date:	06/01/11
Requirement:	Definition of a Credit Hour Rule Changes
Regulation / Law:	Final Rules published in the Federal Register on Oct. 29, 2010 http://edocket.access.gpo.gov/2010/pdf/2010-26531.pdf 34 CFR Part 600 – 600.2, 602.24, 603.24, 668.8
Effective Date:	07/01/2011

Summary:

Previously undefined by the U.S. Department of Education, the rules have been modified to include a new definition of a "credit hour." The rules now specify that a "credit hour" is defined as one hour of instruction plus two hours of outside work or study for each week over the course of the semester or period of instruction or an equivalent amount of work in "lab work, internship, studio work or other academic work leading to the award of credit hours".

The new definition of a credit hour conforms to the "Carnegie Unit" which is a generally accepted standard used commonly in post-secondary education. The Department of Education believes that many institutions are already following the Carnegie standard or a standard very close to it that would only require minimal adjustments. The new regulations also require accrediting agencies and state agencies to review institutional policies and procedures for assigning credit hours and a sample of courses to determine if the institution conforms to commonly accepted practices.

IMPORTANT: The Department of Education is careful to point out that the new definition is to be used for Title IV purposes (including institutional, program, student eligibility, and student enrollment status) and "does not limit nor prescribe the method or manner in which institutions may assign credits to their courses for academic or other purposes". At the same time, the Department more specifically defines the role of accrediting agencies whose responsibility will be to review institutional policy/procedure and adherence to policy/procedure but not to mandate a specific policy. Accordingly, the Department outlines for institutions several "critical flexibilities" in GEN-11-06 that are intended to "recognize the differences across institutions, fields of study, types of coursework, and delivery methods, while providing a consistent measure of student work for purposes of Federal programs."

Be sure to review the Dear Colleague Letter for more information about implementation expectations for accrediting agencies and institutions as well as enclosures with questions/answers and supplemental information.

Impact Areas: Registrar, Instruction, Admissions, Financial Aid

Resources:

NASFAA – http://www.nasfaa.org/Main/Original_Content_Format/2010/Final_Program_Integrity_Rules__ED_Introduces_Definition_of_Credit_Hour.aspx

IFAP –
Dear Colleague Letter GEN-11-06: http://www.ifap.ed.gov/dpcletters/GEN1106.html

Creating a Spending Plan

a first step in money management

Anita Kermes
Director of Outreach & Financial Literacy
ECMC

Amy Kasper contributed a wonderful article last month titled *"Financial Tips to Help Your Students Avoid Freshman Mistakes."* With so much sound advice, I still find myself asking, "How do we get students to follow the first rule of money management?" The rule is simple: If you can't afford something, don't buy it.

How do we enlighten students and steer them toward healthy spending habits? Our collective financial literacy efforts encourage students to be informed consumers. Let's challenge them to understand where their money is going so they can avoid being overburdened with debt when they graduate.

Here are some questions to get your students thinking about their spending.

1. How much do you anticipate spending on textbooks this year?
2. How much do you expect to pay for utilities (lights, heating, etc.) in your apartment each month?
3. How much do you plan to spend on groceries per month?
4. How much of your income will be used to pay your monthly credit card bills?
5. How much money do you anticipate spending on entertainment each week (e.g., movies, music, eating out)?
6. How much money will you save each month for emergencies?

Ask your students to fill out a budget worksheet based on what they anticipate spending. To help them, provide a link to our online spending

planning worksheet located at www.ecmc.org/borrtools/findExpenseSheet.action. Hold a financial literacy workshop on campus to provide the opportunity to follow up with students and discuss actual spending habits and where they may be able to reduce expenses.

If your school has the resources, consider offering an incentive to students who participate in your financial literacy workshop or those who come close to staying on budget.

Enhancing the Campus Visit Experience for Prospective Students

- continued from page 1

Often you might encounter overly eager family members who may feel they need to participate "on behalf" of their students. If this is the case, consider separating the guests from the student during the tour, so that the student has the opportunity to participate more actively in the visit.

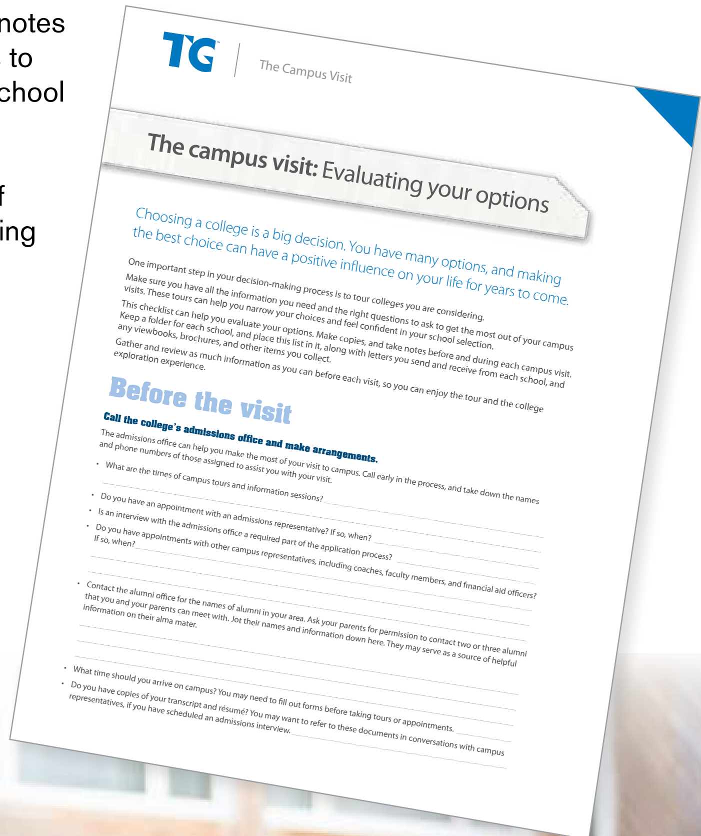
After the Visit

Chances are, during the visit, the student may have expressed an interest in a specific department, project, team, or organization. The challenge is to encourage students to begin establishing a relationship with the campus, often through the people they meet during their visit. Follow up on students by providing additional information on their items of interest. Encourage those who met your prospective students to write quick notes thanking them for exploring the campus, so that they can be sent to the student. It's these types of personal experiences that can make the difference in having a student select your school over others.

To help students stay organized and know what kinds of questions to ask during a visit, TG offers the Campus Visit Checklist. Organized step-by-step, this brochure provides space for students to make notes and prompts them on things to consider as they visit their school choices.

You can order free copies of this helpful brochure by visiting TG Online at www.tgslc.org and selecting "Schools" and "Request Materials." Students and schools can also download the handy PDF version to make copies by visiting Adventures In Education at www.aie.org and selecting Planning for College and Campus Visit Checklist.

Amy Kasper is a regional account executive with TG serving schools in California. You can reach Amy at (800) 252-9743, ext. 6739, or by e-mail at amy.kasper@tgslc.org. Additional information about TG can be found online at www.tgslc.org.



TG | The Campus Visit

The campus visit: Evaluating your options

Choosing a college is a big decision. You have many options, and making the best choice can have a positive influence on your life for years to come.

One important step in your decision-making process is to tour colleges you are considering. Make sure you have all the information you need and the right questions to ask to get the most out of your campus visits. These tours can help you narrow your choices and feel confident in your school selection.

This checklist can help you evaluate your options. Make copies, and take notes before and during each campus visit. Keep a folder for each school, and place this list in it, along with letters you send and receive from each school, and any viewbooks, brochures, and other items you collect.

Gather and review as much information as you can before each visit, so you can enjoy the tour and the college exploration experience.

Before the visit

Call the college's admissions office and make arrangements.

The admissions office can help you make the most of your visit to campus. Call early in the process, and take down the names and phone numbers of those assigned to assist you with your visit.

- What are the times of campus tours and information sessions?
- Do you have an appointment with an admissions representative? If so, when?
- Is an interview with the admissions office a required part of the application process?
- Do you have appointments with other campus representatives, including coaches, faculty members, and financial aid officers? If so, when?
- Contact the alumni office for the names of alumni in your area. Ask your parents for permission to contact two or three alumni that you and your parents can meet with. Jot their names and information down here. They may serve as a source of helpful information on their alma mater.
- What time should you arrive on campus? You may need to fill out forms before taking tours or appointments.
- Do you have copies of your transcript and résumé? You may want to refer to these documents in conversations with campus representatives, if you have scheduled an admissions interview.

TRAINING CALENDAR

Great Lakes

(Learn more at mygreatlakes.org)

August 18, 2011
Master Class: Mastering Common Verification Issues

August 24, 2011
Master Class: Resolving NSLDS C-Codes

August 25, 2011
Master Class: Professional Judgment Perplexities

September 7, 15, or 20 2011
Identity Theft: Helping Students Reduce Their Vulnerability

September 14, 21, or 28 2011
The Yin and Yang of Default Prevention

September 20, 22, or 29 2011
Making the Call: What to Say to Delinquent Borrowers

TG (Learn more at tgslc.org)

August 16, 2011
Financial Literacy
Session 3: "Needs and Wants" and "Setting Goals"

August 18, 2011
Program review success

September 8, 2011
Financial Literacy
Session 4: "Solving Debt Problems" and "Saving and Investing"

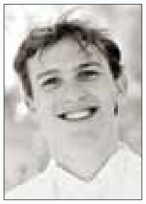
September 15, 2011
Federal update

September 22, 2011
Financial Literacy
Session 5: "Employee Compensation" and "Employee Benefits"

ASA (Learn more at asa.org)

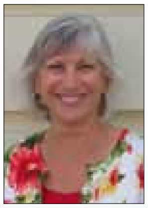
August 17, 2011
Managing Debt

Transitions & Announcements

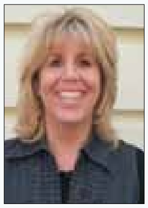


Daniel Reed
Newsletter Editor, Senior Financial Aid Officer
Point Loma Nazarene University

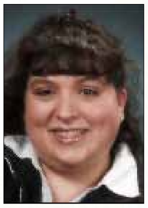
John and Debby Anderson's front yard won third place in the "Water Wise Gardening" competition for the southern California water district region, which includes Riverside and San Bernardino County. First prize went to a regional water company, second to a commercial business, and they were so excited to win third! There will be an awards ceremony and a $500 prize. *Congratulations for this special recognition!*



Luanne Canestro has joined American Student Assistance (ASA) as the Northern California Regional Account Manager and comes to ASA with an extensive background in financial aid and relationship management. Luanne has been in the industry for over 24 years, working in both financial aid offices and on the guarantor and lender sides. Most recently, she served as Relationship Manager for First Marblehead and as a Senior Client Relations Manager for EdFund. She is looking forward to providing schools the products and services they need to develop financially successful students and alumni. *Congratulations Luanne!*



Kelly Kilby has joined American Student Assistance (ASA) as the District Manager of Business Development for the Western Region. In this roll, she partners with the Regional Account Executives of the west to introduce ASA's Education Debt Management and Financial Education products and services to schools. Kelly has a broad background in higher education debt management. She has worked these past 24 years with high debt populations on financial wellness and literacy strategies. She is thrilled to be able to focus on holistic debt solutions in these difficult economic times. *Welcome back Kelly!*



Sunshine Garcia has taken a position with CSU, Channel Islands as the Director of Financial Aid & Scholarships. After her tenure with Cleveland Chiropractic College as the Director of Financial Aid, Los Angeles, she is heading off to the beautiful city of Camarillo. Sunshine looks forward to being a part of the Channel Islands community and the CSU system. *Congratulations Sunshine on this move!*

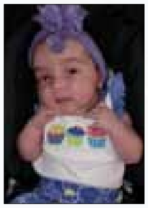
San Jose State University would like to announce:

Neelam Keshwani joined us on July, 1, 2011 as the Technical Lead. She came to us from Santa Clara University where she served in the role of Data Analyst in their Financial Aid Office. Neelam is a proud SJSU Spartan graduate and we are excited that she has joined our group.

Anthony Bettencourt has been promoted to Sr. Financial Aid Counselor and will serve as Lead to the Counseling and Advising Staff. He began his employment at SJSU as a Federal Work-Study student in our office while pursuing his undergraduate studies, and has moved thru different units in our staff. His last position was as a Financial Aid Counselor with the responsibility of coordinating the Federal Work-Study Program. Anthony is also a Spartan graduate and we are excited for him to take on this new role.

The stork has also been flying low and dropping off bundles of joy as we have had 3 babies born in our office in the last 3 months. We would like to welcome the following to our SJSU Financial Aid & Scholarship Family:

Santiago Bettencourt (son to **Anthony Bettencourt**, Sr. Financial Aid Counselor), was born on April 25th, 2011. He is the first child for Anthony and his wife. They are loving their new role as parents!!



Ava-Grace Jimenez Howard (daughter to **Felicity Jimenez-Howard**, Financial Aid Counselor and Scholarship Coordinator), was born on June 16th, 2011. She is the 2nd child for Felicity and her husband, and has a big brother, Brennan, who can't wait to play with his little sister.

Noah Aidan Serrato Lager (son to **Lucy Serrato-Lager**, Assistant Director of Operations/Technical Services), was born on July 7, 2011. Noah was welcomed by his parents, as well as, big brother, Ethan, and big sister, Briceyda. They can't wait to show Noah the ropes at the Lager household.

Wow! If you want some big life changes, SJSU is the place to be! Congratulations everyone!

CASFAA, c/o Daniel Reed
3900 Lomaland Drive,
San Diego, CA, 92106

CASFAA Membership
Information Available At:
www.casfaa.org

Postponement of the 2011 Summer Training Event's

Lily Ana Marquez
2011 CASFAA Training Chair

Financial Aid administrators are always undergoing different transitions and change. This year, the Training Committee is undergoing some changes too. We began working on planning for training events in the summer for Northern and Southern California with great things in mind. However, in order to adequately prepare and obtain great resources for attendees, the committee decided to postpone the summer training events for future dates. We are exploring moving these events to Fall 2011. But, before making this decision final, a survey will be sent to all CASFAA members to measure attendee availability and current training needs. We encourage everyone to support us by completing the survey, which is scheduled to be sent in August. We greatly appreciate your quick response, time and understanding!