

SPECIAL EDITION: 50 YEARS OF CASFAA



CASFAA CONFERENCE HIGHLIGHTS

Statement from Bronwyn Garrison

PAST CASFAA PRESIDENT 2021-2022

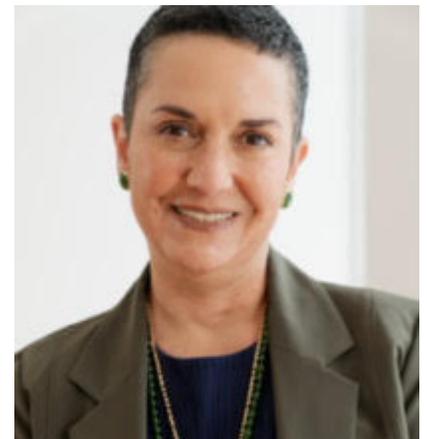
"It was such an honor serving as CASFAA's 2022 President. No question the thing I loved the most this past year was working with the 2022 Executive Council. I was (and am) consistently in awe of folks' tireless dedication to student access and success, and drive to support CASFAA and our members. We barely have enough hours in the day to do our jobs, so to see those volunteering outside work hours and to still bring the energy and enthusiasm ...it is refreshing and reminds me of much I love our profession. I greatly appreciated the opportunity to share knowledge, work with folks to organize and participate in this year's 2022 CASFAA conference and bring to the table thoughtful and lively discussions on financial aid legislation and best practices. I also loved learning more about other financial aid segments perspectives which nudged me to go outside of my personal and professional comfort zones and consider a bigger picture. Overall, this was an incredible opportunity I hope others will consider moving ahead, I hope I made an impact and I am looking forward to continuing to support CASFAA in the years to come."



Welcome Christina Tangalakis!

NEW CASFAA PRESIDENT 2022-2023

As the new CASFAA President, I hope to represent the diversity of our association effectively. My hopes are to oversee the transition to our next strategic plan, expand membership, improve the volunteer experience and provide timely training as we navigate FAFSA simplification, the end of the pandemic, and reentry into loan repayment. I am really excited about our combined 2023 Conference and 50th anniversary celebration. This year is a rare opportunity to reflect on the history of our association, acknowledge those who have helped built CASFAA into what it is today, and celebrate our accomplishments. I am anxious to reveal the conference theme, too. We've been working hard to strike the right note for this event. I'm looking forward to hearing from CASFAA membership about their expectations for our 2023 celebration.



Conference Chair Reflection



**THOMAS LE
CONFERENCE
CO-CHAIR**

"This past year, we were finally able to welcome our members back to an in-person conference in Santa Clara. The most enjoyable experience there was being able to interact with our members face-to-face and provide professional development and networking opportunities. It was so much fun to see warm bodies with happy smiling faces again along with handshakes and hugs. Reflecting back, I did actually enjoy the little chaos with running around behind the scenes troubleshooting issues at the event to keep the conference running smoothly. I was able to sit back on stage and soak in all the hard work during our conference dinner knowing our members were having a fantastic time out there on the dance floor. The simple thanks of gratitude and appreciation from our members at the closing breakfast made it all worth it. I am looking forward to hosting our annual next conference in Long Beach in October 2023. See you all there!"



CASFAA CONFERENCE HIGHLIGHTS CONTINUED

Congrats to our 2022 CASFAA Award Recipients!

MERITORIOUS SERVICE AWARD:



Rashinda Hutchinson
Assistant Director
UC San Diego

2022 CASFAA CONFERENCE SCHOLARSHIP RECIPIENTS!

Christina Gray Financial Aid Counselor *Samuel Merritt University*
Yesenia Camacho Financial Aid Advisor *California State University Stanislaus*
Naveed Azim Student Financial Services Analyst *Unitek College*
Patrick Martin Packaging Adviser *FASO UC Santa Cruz*
Henry Mai Financial Aid Systems Technology Analyst *Peralta Community College District*
Erika Lambert Financial Literacy and Outreach Coordinator *Palo Alto University*

LIFETIME MEMBERSHIP:



Thalassa Naylor
Director of Business
Development Sallie Mae

NEW/CONTINUING EC MEMBER INTRODUCTIONS!



Nitya Loganda (NEW)
Financial Aid Advisor, UCLA
Newsletter Editor

I would love to grow my network within CASFAA and learn more about different perspectives in Financial Aid! I'm excited to take on the new role as the Newsletter Editor and be creative with it. I am also hoping to grow as a professional and apply what I learn within this association.



Ciel Senechal (NEW)
Campus Development - West Coast
Historian

In this role, I hope to be able to gather stories from CASFAA members throughout the years so that our membership can see what a rich tapestry of pioneers, innovators, talent and leadership we have. I am also interested in gathering memorabilia that we can share to remind those of us who have been around a while just how much we have done, and to show our newer members what can be accomplished when we all work together for the good of our community. I am really excited about this role and look forward to communicating throughout the year with fun facts, interviews, and other information.

DISTINGUISHED SERVICE:



Mark Kantrowitz
President Cerebly, Inc



Jesse Marquez (CONTINUING)
Associate Director of Financial Aid
Systems, Whittier College
Access and Diversity Representative

What I love most about volunteering with CASFAA is the ability to give back to the financial aid community and colleagues that has given me so many opportunities to grow and develop in a profession that allows me to serve students and families. I look to serving as the Access & Diversity Representative as it allows me to be a

voice and advocate for colleagues and students that are under-represented.



Naveed Azim Unitek College (NEW)
Student Financial Services Analyst
Proprietary Segment Rep

I met many of the team at the last CASFAA event earlier this year and decided to get involved with CASFAA to learn more about the financial aid world. I believe CASFAA is a great opportunity to allow those interested in the field to really learn all about what the financial aid school sector looks like and just how much fun it can be! I look forward to meeting everyone and assisting CASFAA in making the next big event amazing!

PRESIDENT'S SPECIAL AWARD:



Wendy Wang
Director of Financial Aid
San Diego City College

REMINDERS!!

2022 CASFAA CONFERENCE INFO:
Available on the conference site till
January 31, 2023

Whova App Info:
Available till January 2023

SAVE THE DATE:
2023 Tax Training Workshops. Keep an
eye out for registration!

**RETIREEES! Interested in staying connected? More
information to follow for our 50th Anniversary!**



New Federal Changes

- EFC (Expected Family Contribution Replaced) by SAI (Student Aid Index)**
 - Will replace the EFC defined as "a measure of how much the student and his or her family can be expected to contribute to the cost of the student's education for the year." (masfaa.org)
- Applicant Change**
 - Divorced/Separated Parents
 - The applicant change will now require students to input the income of the parent who provides the most financial support.
- Expanding Access to Financial Aid**
 - Expand Pell grant eligibility to more students and link eligibility to family size and poverty level

New State Changes

- Middle Class Scholarship (MCS) 2.0**
 - Students can now receive Cal Grant and Middle Class Scholarship simultaneously if there is need left. This was not allowed in the 2021-2022 AY.
- Cal Grant Continuing Student Amounts vs Fall 2022 amounts**
 - Continuing students admitted prior to Fall 2022 received Cal grant for \$12,570 if they had a minimum need of \$14,070. Students admitted in Fall 2022 and after get awarded \$13,104 if there is a minimum need of \$14,604
- Native American Opportunity Plan (NAOP)**
 - UC system only: UC announces a plan to cover system-wide tuition and fees (tuition and student services fee) for Native American students who are members of federally recognized tribe.

Customized private student loans.

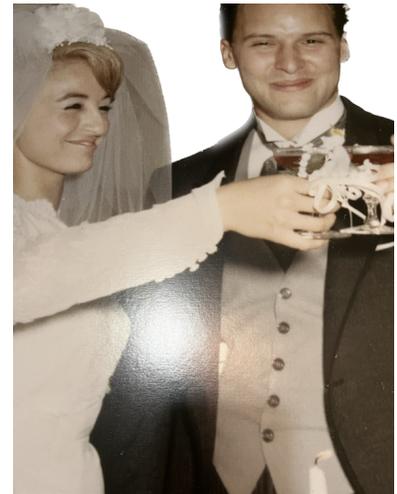
earnest

CASFAA Historical Spotlight: Otto Reyer

Like so many of us, Otto Reyer fell into his financial aid career through circumstance. He was working in the mortgage banking industry and business had dried up. His neighbor suggested he look for employment at UC Irvine where his roommate was employed. There was a job opening in financial aid and Otto got a position working as an Accounting Clerk. It was the early seventies and at the time, the standard situation at many universities was that anyone - from the secretary to the president - would take in scholarship funds and send them over to the financial aid office. Eventually, the office began working with the federal student aid programs and then later, the Cal Grant programs. And that is when financial aid really became a profession. Otto spent the next 23 years at UC Irvine where he finished his tenure as an Assistant Vice Chancellor. While at UC Irvine, Otto became interested in how to transform the financial aid office from a completely manual process by using technology and automation. The first transformative technology that came out was the EFC calculator. Prior to this, even the EFC was calculated by hand. Otto and his friend, Tom Rutter from UC San Diego approached Rockwell about creating an EFC calculator. They knew Rockwell had calculators and they presented their idea, signed a contract with Rockwell, and their calculator was developed. With the EFC calculator, the information from a financial aid application would be typed in and the calculator would spit out the EFC. The paper "receipt" would then be stapled to the student's financial aid record and used to determine eligibility for funds. Otto and Tom wanted to make sure that every possible EFC in the calculator was correct, and they painstakingly verified all of the calculations. This bit of technology transformed the work of financial aid offices at the time. But Otto's impact didn't stop there. In 1977, The University of California (UC) system decided to decentralize their large computer operations (e.g., Registrar, General Ledger, Financial Aid, etc.) and allow the individual campuses to have more control over their data processing. This created an opportunity for Otto and his associate director, Hiroshi Ueta, to think about how they would like financial aid designed from a systems perspective. What resulted was INFAMOUS (Irvine's New Financial Aid Management On-line User System). This system was integrated with other department systems, which meant that individual offices did not have to enter the same data for a student. It also allowed the financial aid office to begin analyzing data such as, "How many students have their parental contributions recalculated as a result of collecting 1040s and what is the dollar difference awarded in financial aid?" The system also had another key component: it contained the first imaging system of higher ed in the nation. Once ready, Otto and Hiroshi showed the system at the regional financial aid conference and several state associations. The Department of Education heard about the system and flew out to see it. They were trying to solve a different problem. They were looking for a way to codify four warehouses of paper audits. They were particularly interested in the imaging function of INFAMOUS. With Otto as a consultant, Project EASI was born (Easy Access for Students and Institutions). This was an information and systems redesign and re-engineering plan for federal and other delivery systems of student financial aid. And, from Project EASI the electronic FAFSA and COD (Common Origination and Disbursement System) was developed! When Otto left UC Irvine, the majority of the student loan programs were administered under FFELP (Family Federal Education Loan Program), and banks functioned as the lender. He decided to join a group to start a student loan company for American Express. He spent the next 2-1/2 years helping to grow that company into a successful business and he then returned to his roots in financial aid. This time he took a job as the Director of Financial Aid and Special Assistant to the President at Western University of Health Sciences. After 18 years, he retired from WUHS and holds his title emeritus. Otto was around when CASFAA first started. There was an initial meeting spearheaded by Bob Huff of Stanford, Don Ryan of San Jose State University, and John Danielson of UC Berkeley, among others. They met in September of 1971 to determine the feasibility of starting a financial aid association in California. And that was the beginning of the California Association of Student Financial Aid Administrators (CASFAA). The first conference was held the following year in Monterey at the Holiday Inn. The hotel was along the ocean and Otto recalled that the wind was so horrific, they couldn't open their hotel room doors without the help of a roommate. Aside from the sessions offered, Otto said innovation would happen at the bar. This is where people would gather to discuss their challenges, come up with new ideas, and share their stories. Otto shared a couple of stories about his approach to financial aid. At UC Irvine, his assistant director came to him with a student who was disowned by her parents. She was unable to supply any parental information. Otto told his assistant director to award the student a scholarship because, at the end of the day, his job was helping students finance their education. Years later, Otto thought about what that scholarship had meant to the student. He realized then that the primary focus should always be on the student, and this was the single most impactful realization in his career. Another time, when Otto's wife Bebe was ill, they went to their local emergency room. One of the doctors came over to Otto while they were waiting and told him that he had hated him for a long time. He had been a medical student and Otto would not approve a large loan increase that he wanted when he was in medical school. But he went on to tell Otto that today he wanted to thank him because he has so much less debt than his colleagues and he is better off for it. In reflecting on his career, he said, "I studied for most of my life to be working in financial aid." His advice to current financial aid administrators is to "Center your career on the students. Help get those students an education. The job you have is to finance it. Don't forget you have a great job because you are always figuring out solutions to help." CASFAA solutes Otto for his many contributions in the field of financial aid. If you know of someone who has a **historical story** to share, please contact **Ciel Senechal** at csenechal@collegeave.com.



OTTO REYER



OTTO WITH HIS WIFE BEBE

CASFAA Volunteer Opportunity!

VOLUNTEER WITH THE HISTORIAN COMMITTEE!

Are you someone who likes to search and find archival information to verify facts and make history come to life?

CASFAA is celebrating its 50th year at its 2023 annual conference. To commemorate our rich history, The Historian Committee is responsible for pulling together the history of CASFAA and presenting the highlights in a fun and interesting way to the association. We will also be adding to the archived records of the association.

If you are interested in helping out, or if you have old CASFAA memorabilia lying around or, better yet, a story or two from days gone by, please contact Ciel Senechal at csenechal@collegeave.com or by cell at (562) 826-7636. I would love to hear from you!

CASFAA MAILING ADDRESS FOR PAYMENTS IS:

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