Hello from the San Diego airport! I’m waiting for my flight home after a busy WASFAA Executive Council and Transition Meeting. I’m excited for President Elect Ashley Munro’s presidential year—Ashley has served WASFAA in a many roles with consistent excellence, her knowledge is deep, and her organizational skills are outstanding. She will guide her incoming Executive Council with wisdom, excellence, and an eye toward innovation and ongoing improvement. She’s also a really lovely person, and it’s always a privilege to work with her.

Are you ready to come to beautiful Boise for the WASFAA Annual Conference April 22-24? There are so many reasons to attend! Visit the conference website for all of the details.
• Did you know that our esteemed NASFAA National Chair Billie Joe Hamilton will be speaking, and so will our legendary NASFAA President and CEO Justin Draeger? These rock stars of financial aid will bring their dazzling intellect and their passion for affordable postsecondary education to teach and inspire all of us.
• Boise is one of the best-kept secrets in the western region as a travel destination—it has the perfect mix of natural beauty, fun activities, and great food and shopping. Google it and you’ll see!
• For me, I know the greatest highlight of the conference will be seeing all of you. At least half the value of attending in-person training events is the networking—sharing challenges and solutions, finding mentors, and learning how different our jobs can be from school to school is endlessly fascinating and rewarding.
• Here’s another fun tidbit—at the business meeting, you’ll get to vote on whether to add an institutional pricing option for WASFAA membership, which is kind of a big deal.

Did that last bullet point pique your interest? It should! The Executive Council has been discussing the potential benefits of offering an institutional option for membership for several years, and many of you responded to the membership survey we sent out last fall to gauge your interest. Thank you for taking the time to respond and for being so thoughtful in your comments. We heard resoundingly from our members that retaining our current individual membership was important, but that the addition of institutional option would also be appreciated. Some of the benefits of an institutional option include convenience of renewal for offices with multiple members, cost-effectiveness of being able to provide the benefits of membership to all employees at one institution (member pricing at training events, volunteer opportunities, and being included in our communications), and improved continuity of membership. It would also provide the ability of non-financial aid employees to easily participate in WASFAA training opportunities such as Fall Training at a reduced rate, giving us the opportunity to reach a wider audience and improve understanding and awareness of financial aid across our campuses. It was also clear from your responses that you care about retaining individual voting rights, rather than switching to a model in which only one person at each institution can vote, which was very important feedback.

I can’t wait to see you NEXT MONTH in Boise! If you can’t make it to the annual conference this time, I hope you’ll keep an eye out for all the other outstanding training and professional development opportunities WASFAA offers throughout the year, including serving in one of our many volunteer roles. As my presidential year draws to a close, I am so deeply grateful for the opportunity to have served you this past year, and I am endlessly impressed by the dedication and excellence of the many volunteers who selflessly and passionately give of their time and expertise to make WASFAA so vibrant and relevant.

Sincerely, Helen Faith

WASFAA TRAINING COMMITTEE UPDATE

WASFAA Training Committee is pleased to provide two pre-conference sessions to be held in beautiful Boise, Idaho!
Sunday, April 22
8:30 -11:30 am

From NASFAA U: Consumer Information
In this session, provided by trainers credentialed in this subject by NASFAA, you will learn all about the required disclosures of institutional information, financial assistance information, campus and fire safety, completion and transfer-out rates, and athletics. You will receive a copy of the self-study guide and a voucher, which will allow you to take the test to earn your NASFAA credential in this topic. (Cost is over $600 when done directly through NASFAA)

Re-Imagining the Financial Aid Experience
In this session, you will earn about how to provide the next level in customer service. Join us for an interactive session on creating magic in the financial aid office, inspired by concepts from the Disney book Be Our Guest, Perfecting the Art of Customer Service. Participants will receive a copy of the book to take back to the office.

Cost for WASFAA Members: $45
Please note that a separate registration is required.
Conference information and link to pre-conference training:
Hello WASFAA and welcome to the March Newsletter! The WASFAA Executive Council meeting just wrapped up in beautiful San Diego, CA. This was my last meeting as your Communications Chair and my first meeting as the new Secretary. Congratulations to Nic Dehaan from the University of Phoenix on his appointment to the role of Communications Chair for 2018-2019! Nic and I will be working together over the next couple of months for a smooth transition and he will officially take over his role on May 1st.

We have some great articles this month. Don’t forget to mark your calendars for our upcoming Conference and Summer Institute! If you would like to contribute to the April newsletter, please send your articles or submissions to communications@wasfaa.org by March 20th.

WASFAA welcomes all views and invites submissions of articles, essays, photographs or information of general interest to all members. Submissions should be brief and should not advertise specific products or services. Submissions may be edited. It may not be possible to publish all articles submitted. Opinions expressed in the WASFAA Newsletter are those of the authors and not necessarily of WASFAA, its members or the institutions represented by the authors. Email items for publication to communications@wasfaa.org.

Newsletter Ads

Newsletter ads are a great way to advertise your products and services. The newsletter will be published electronically on a monthly basis.

Cost for 3 months:

- Full page: 7 ½” x 10” $500
- Half page: 7 ½” x 4 ¼” $250
- Quarter page: 3 ½” x 4 ¾” $100

MARCH FREE TRAININGS

WASFAA is pleased to share web based training opportunities for financial aid administrators provided by our industry partners during the month of March.

Topics range from financial aid compliance, to helping students managing debt and repayment.

These training and informational sessions are available to you free of charge.

Click here for more detailed information on the sessions offered and the registration links.
WASFAA CONFERENCE COMMITTEE UPDATE

Hello from the WASFAA Conference Committee!

We hope everyone is enjoying their spring semesters! Almost 100 of you have already signed up to attend the WASFAA Conference in beautiful Boise, Idaho in April. What an excellent choice! For those of you who haven’t signed up yet, both the early bird rate and hotel block are still open, so don’t delay and register today! If you didn’t see the email that went out in February, the full agenda has been published and is available on our conference site. Please use this to help justify your attendance by showing why this is a must attend event for learning and networking!

We also will be releasing information on our conference charity very shortly and have a fun new twist on Bingo at the conference - the one and only interaction that gets you entered to win prizes! Also be watching for your chance to add to your resume by volunteering to be a conference moderator!

Conference Co-chair David Shook had this to say when reflecting on the opportunity to attend the WASFAA Conference:

_During my fourteen years in the financial aid industry, I've attended many conferences and trainings. Here at WASFAA, no matter the venue, there is a real opportunity to learn. The sessions are geared towards current happenings in our region and in our nation. Rules and regulations are always at the forefront of our speakers' and moderators' responsibilities. We all interpret these differently and WASFAA provides an environment to talk amongst ourselves to further our understanding of new laws and our required actions. Session numbers are much smaller and intimate, which in turn creates ways to discuss with veterans in the industry - processes, workflows, and methodologies that keep us within our responsibilities to both the federal government, our institutions, and our students._

Just a few of the many reasons we extend a warm invitation to join us in scenic Boise, Idaho for WASFAA's 2018 “Together We Rise” Conference. Think of it this way - this is time devoted just to you - a chance to converse and learn from and with one another, so that together we can rise!

See you next month in Boise!

WASFAA Conference Committee
EXECUTIVE COUNCIL TRANSITION MEETING

Ashley Munro  
Associate Director  
University of Alaska – Fairbanks  
WASFAA President Elect

The 2018-2019 WASFAA Executive Council met in San Diego, California in late February for an orientation session and to observe the 2017-2018 Executive Council Meeting. We spent time figuring out our goals for the next year, discussing fiscal challenges and brainstorming about leadership opportunities. Overall, we had some interesting ideas to celebrate 50 years of WASFAA (stay tuned for details!) and how to build leadership skills for WASFAA members.

I am looking forward to working with these folks over the next year to build trainings and programs. If you have ideas, needs or suggestions I hope you feel comfortable reaching out to executive council members. I would love to hear from members more often, so I am including my email address: akmunro@alaska.edu. Please feel free to contact me at any time.

After the transition and executive council meetings, I flew to Washington DC to attend the NASFAA Leadership Conference. Attending with Helen Faith, current WASFAA President, the two WASFAA scholarship winners and a few state presidents from our region provided opportunities to discuss ways we can improve our meetings and processes.

On the last day, we visited Capitol Hill to talk to a staff member for the US House Committee on Education and Workforce and a policy advisor for the Senate Committee on Health, Education, Labor and Pensions. We shared our perspectives on the Prosper Act, making sure they heard what we felt was a benefit to students and what would be harmful to schools and the financial aid programs. I appreciated the opportunity to share my thoughts on the proposal, as well as the chance to participate in the legislative process- it’s not as scary as I thought! Having other WASFAA members with me helped. I would encourage everyone to try it, especially knowing that you are not alone.

VOLUNTEER FOR WASFAA!

We need you! Volunteering is a great way to network with fellow financial aid professionals, obtain professional development, and make a difference to our organization. Check out the committee descriptions to see which of our 15 committees is the right fit for you. Sign up today using the volunteer form or update your preferences when you are renewing your 2018-19 WASFAA membership.

Ashley Coleman  
WASFAA Volunteer Development Chair  
ashleyjo@uoregon.edu
NASFAA SCHOLARSHIP AWARD WINNER

David Downing
Assistant Director of Communications-
Washington State University
WASFAA Communication Chair 17-18
WASFAA Secretary 18-19

My head is literally spinning at 36,000 feet above earth as I write this after attending the NASFAA Leadership & Legislative Conference & Expo held in Feb 26-28 in Washington DC. I was so excited when I received the notification from WASFAA that I had been selected as one of the two scholarship recipients they awarded to attend this year’s conference. This scholarship was a result of WASFAA’s 2017-2020 Strategic Plan which includes developing a leadership training/pipeline program for the association. I am truly honored to have received this scholarship!

I attended the New and Aspiring Directors track where I attended sessions focused on learning the ins and outs of being a leader in the financial aid office. All of the sessions I attended were taught by experienced financial aid directors who have decades of financial aid experience. It was a very unique experience to hear from folks who have truly shaped the financial aid industry into what it is today. The skills and resources I learned from these sessions will hopefully help me in my current role as an Assistant Director and help me be a stronger financial aid leader.

The second part of the conference was focused on visiting with legislatures to discuss our positions on the Prosper Act. We heard a Federal Update from NASFAA President Justin Draeger, and on the third day of the conference we had the opportunity to meet with legislatures on Capitol Hill.

Brian Dixon (WA), Apri Medina (CA), Rebekah Salcedo (AZ), Lissa Wayne (CA), Ashley Munro (AK), Daniel Lemus (ID), Javier Andrade (CA), Yuliana Sandoval (CA), Anita Kermes (CA), Helen Faith (OR), Kim Murphy (AZ), David Downing (WA), Kelly Forsberg (WA)- Before our meeting with the Policy Advisor for the Senate Committee on Health, Education, Labor, and Pensions.

All of the materials provided to policy staffers to help #Fight4FinAid
I along with several other WASFAA members attended our first meeting of the day with Bryce McKibben who is the Policy Advisor for the Senate Committee on Health, Education, Labor, and Pensions and works with Senator Patty Murray (D) from my home state of Washington. We spent almost an hour in conversation with Bryce discussing our positions on the Prosper Act, but also engaging in conversation about what we would like to see in the Senate’s version of the bill. I’ve worked in financial aid for nearly 14 years and this is the first time in my career that I have had the opportunity to participate in this type of advocacy effort. I was not quite sure what to expect and was truly amazed by the level of interaction and respect we were given to hear our options as financial aid administrators.

After being energized and excited after my first meeting, I spent the rest of the day alongside colleagues from my university, meeting with policy staff who work for representatives from my home state of Washington. We met with policy staff from the offices of Congresswoman Cathy McMorris Rodgers (R), Congressman Rick Larsen (D), Congresswoman Pramila Jayapal (D), Congresswoman Suzan DelBene (D), and Congressman Dan Newhouse (R). Since my University has locations across the entire state of Washington it was important for us to meet with as many offices as we could to discuss how the Prosper Act directly affects the students in each of the districts within Washington State.

Overall all of the meetings I attended on Capitol Hill went really great. Although I started out being nervous, those nerves quickly melted away when I began speaking about our students and how important financial aid is to helping them better their lives. One clear theme throughout the day was that no matter what side of the aisle we were meeting with, everyone has the same goal in mind- to help students succeed! After this experience, I will be following higher education policy a bit more closely, and I am excited to continue advocacy efforts to #Fight4FinAid!

I can't thank WASFAA enough for the amazing opportunity to attend this event! If you are not currently a member or a volunteer with WASFAA I highly encourage you to get involved. Depending on your interest and skill sets, volunteering on a committee might not take much of your time, and it is a great way to get your foot into participating more with this amazing association!
SAVE THE DATE
WASFAA Sister Dale Brown Summer Institute
University of Nevada | Reno, Nevada | June 4-8, 2018

WASFAA SISTER DALE BROWN SUMMER INSTITUTE JUNE 4-8, 2018 IN RENO, NEVADA

Planning is underway for the WASFAA Sister Dale Brown Summer Institute June 4-8, 2018 at the University of Nevada Reno! Co-Chairs Kelley Christianson and Laura Hughes have recruited a fantastic faculty and planned the draft agenda that includes a Beginner, Intermediate and Advanced track. Each track is comprised of NASFAA U, WASFAA and Department of Education training topics. The NASFAA U courses offer the ability for the participant to earn their NASFAA U credential after completion of the Summer Institute. Resident registration is set at $775 (that’s a bargain for 5 days of training, housing and meals!) and commuter registration is $525 (housing is on your own).

If you have attended Summer Institute in the past, the intermediate and advanced tracks give you an opportunity to learn about more in-depth topics and deepen the conversation into best practices.

If this is your first Summer Institute, get ready to spend a week immersed in all things financial aid along with about 100 colleagues. Resident participants will stay in UNR residence hall accommodations and dine at UNR’s Downunder Café! We will have a limited number of ‘single’ residence hall rooms available that can be reserved and paid for during the registration process on a first-come, first-served basis.

Registration will open soon and an announcement will be posted on the WASFAA listserv. Please visit the Summer Institute mini-site for more information.

See you in Reno!
CONSIDERING CONSOLIDATION? TIPS TO DRIVE EFFECTIVE COMMUNICATION

Amy Glynn
Vice President, Financial Aid & Community Initiatives
CampusLogic

More and more state college systems are exploring or implementing consolidation and mergers among campuses. The landscape of higher education is changing and schools are looking for ways to stay relevant and profitable at a time when enrollment is rightsizing to pre-recession levels. States like Georgia, Connecticut, Pennsylvania, and Wisconsin are leading this shift. But doing so can sometimes create a lot of concern around ensuring the best student experience throughout the student financial services journey.

How do you help people—students, staff, and the community at large—navigate this change? Communication is key. Regardless of whether there are 10 campuses that process student files locally, or 10 that process files centrally, your students are still the same people. As you look at the types of communications, information, or processes that are difficult or confusing to students today, you may need to identify different ways of overcoming those challenges within a consolidated system. Below are five things to think about for managing change while keeping students and staff engaged.

5 TIPS FOR BETTER COMMUNICATIONS WHEN COLLEGE SYSTEMS CONSOLIDATE

1. **Face-to-face interaction** is not always scalable for centralized student financial services support. But we all know how important and effective it can be. Challenge yourself and your team to come up with innovative alternatives. Consider videoconferencing, using Skype or ConexED with screen-share, to walk students through verification, financial aid awards, professional judgment, or billing questions. The combination of video and screen sharing will enable you to review documents and answer questions in real time—almost as if the student was right there in your office. “FaceTiming” has become an everyday occurrence for many students; it gives them a sense of comfort in knowing that there’s a real person on the other end of the line. Students are likely to appreciate the (virtual) interaction.

2. **Communication is not limited to students.** If you want to scale operations effectively, a good communications plan includes employees and leadership, too. As schools consolidate and resources are pooled, many offices will grow in size. With this growth comes the need to ensure that communications are clear, directed at the right person, collaborative, and actionable. It’s important to keep everyone well informed before, during, and after consolidation.

3. **Use data to be more effective.** Don’t manage on ‘gut feel’ alone. You need to use data to make strategic decisions. Knowing where you have effective student touchpoints or interactions is imperative for maximizing the results of a system-wide consolidation. A few best-practices suggestions:
   • Look at the open rates of email communications and award letters;
   • Measure click-through rates to better understand the effectiveness of your calls-to-action;
   • Review document reject-rates by type and employee.
(continued from previous page)

Your institution is a treasure trove of information. Use data collected on students as they travel through the student financial services journey—financial aid, admissions, and scholarship applications—and academics to develop a relevant, personalized change-management and communications strategy.

4. **Let technology do the work for you** in the form of personalization and segmentation. Instead of having admissions, financial aid, student accounts, and academic advisors spend endless hours writing personalized emails to students, think about using an email/contact management system that uses logic for variability. Doing so frees up a lot of time so your staff can refocus its efforts on more high-touch interactions.

When I hear from someone who knows a little about me—and it shows in their emails to me—that goes a long way toward building trust and developing a relationship. Test this idea with your students. I’m willing to bet personalization will improve engagement.

Use technology that customizes next-step messaging, or missing information notices, based on outstanding tasks found in the student information system (SIS). For instance, say your data indicates that 75% of first-generation students in the county complete their master promissory note (MPN) but not their entrance counseling. Send those students a special notice with additional resources about the importance and ease of FAFSA completion—and remember to track the results.

5. **Eliminate variability.** I know, you’re probably saying, ‘Wait a second—you just told me to create more personalized student communications.’ Not exactly; I said to create personalization that can be automated. When we’re talking about functions performed by staff members, you’ll increase accuracy while reducing keystrokes and cycle times by automating personalized communications.

The processes within student financial services can be very complex with extensive decision trees. But the nice thing about automation based on logic is that once you decide what rules you want followed, you can build those rules into email/contact management systems and create a high level of automation around document requirements, awarding, disbursing, and verification.

*A proven leader in higher education, Amy Glynn spent more than a decade in financial aid, ensuring products and services were in compliance with Federal Title IV regulations while meeting the highest service levels possible. Today she is the Vice President of Financial Aid & Community Initiatives at CampusLogic. She earned her Master of Science in Higher Education from Walden University*

---

**STATE NEWS**

*John Bender III, Idaho State President*

*Application Specialist*

*Lewis-Clark State College - Lewiston, ID*

I’d like to thank my EC, all the wonderful IASFAA volunteers and the rest of the membership for making this a great year.

I’m currently working with the incoming President (the very capable Daniel Lemus from Boise State University) to ensure a peaceful transition of power. I’m also helping the Vice President (Ms. Stephanie House of North Idaho College) put together a strong slate of nominees for our elections coming up next month.

This is my last official newsletter as Idaho President. I hope I’ve left the association a little better off than when I took the reins.
(Continued from the previous page)

Did you know that the WASFAA annual conference is in Idaho this year? I’m excited about sharing the absolutely wonderful WASFAA Conference with my friends in Idaho. We’re a small state and quality training opportunities can be hard to come by. Idaho is a beautiful place and I’m just as excited to share a small chunk of it with my WASFAA friends.

Did you know that Idaho has an important history in the technology field? Philo T. Farnsworth, inventor of the all-electronic television, spent his formative years and grew his interest in electronics on the family ranch in Rigby, Idaho. Farnsworth’s television-related work, including an original TV tube he developed, are on display at the Farnsworth TV & Pioneer Museum at 118 W. 1st S. Rigby, Idaho.

The world’s first peacetime use of nuclear power occurred when the U.S. Government switched on Experimental Breeder Reactor #1 (EBRI) near Arco, on December 20, 1951. The town of Arco became the first city in the world to be lit by atomic power on July 17, 1955. It was only temporary, but the way was paved for commercial use of nuclear power. The Arco reactor later suffered a partial meltdown -- another World’s First. There’s no highway sign bragging about that.

In 1969 NASA used the Craters of the Moon National Monument to prepare astronauts Alan Shephard, Edgar Mitchell, Joe Engle, and Eugene Cernan to prepare for landing on the moon.

I hope to see you in Boise in April. Track me down and ask me what my favorite thing about Idaho is!

Happy whale season from Hawaii and the Pacific Islands! Humpback whales visit Hawaiian waters each year from November to May with the peak season being from January to March. It is estimated that the main Hawaiian Islands contain the largest seasonal population of North Pacific humpbacks in the world. Whale watching boat excursions are in full swing here on the islands. But you don’t need a boat to see them. If you have a beach chair and a couple of hours to scan the waters, you can see them from the shore!

The PacFAA board and volunteers are busily working on all the details for our annual PacFAA conference. This year’s conference will be held on March 27-28 at the Ala Moana Hotel in Honolulu. We have an awesome conference agenda that includes presentations from NASFAA President, Billie Jo Hamilton, WASFAA President, Helen Faith, WASFAA Trainers, Anthony Marrone and Nicole McMillin, Special Agent Adam Shanedling from the Office of Inspector General and our federal trainer, Bruce Honer. PacFAA conference attendees will get training on topics such as R2T4, SULA, Default Management, 2018-19 Verification and many others.

PacFAA is especially pleased that we were able to partner with WASFAA to provide an opportunity for our conference attendees to get the WASFAA Customer Service Fall Training during the PacFAA Conference. It’s great to know that WASFAA is committed to providing training for our PacFAA members no matter how creative we have to be to get it done!

I am reflecting on this past year as my PacFAA presidency is winding down and I am pleased with all we have accomplished as a PacFAA Board. I am grateful for the opportunity to serve my fellow financial aid colleagues in the role as PacFAA President. At the same time, ready to move into my role as past-president. Maybe this time next year, I’ll have more time to pull up a beach chair and check out those humpback whales!