Aloha All!

Fall is here, school has started and we have all survived! OK, a few more gray hairs, sleepless nights, new federal regulations, a new verification process – and yet through it all you were there! Not for the glamour, not for the glory, certainly not for the money – you were there for the students. I hope you never lose sight of this – without you so many of them would not now be attending classes. OK, so a few of them are not attending and R2T4 looms large in your future, but on behalf of the many that are in school because of your efforts – thank you!

The next meeting of the Executive Council will take place on November 7-8, 2014 at the Silver Legacy Hotel, in Reno, Nevada. This is the site of our 2014 Conference and the Executive Council will have the opportunity to tour the property and review arrangements for the Conference. All meetings of the Executive Council are open to the membership. One of our key items for this meeting will be the establishment of our 2014 budget.

One of the issues that we struggle with each year at budget time is the use of asset reserves to maintain a balanced budget. This involves using money that we have from previous years as an income entry to assure that we cover the projected expenses for the year. We are committed to maintaining a high level of quality services to the membership – and if that means we need to use some of our reserves, then so be it – it is why we have reserves. However, all of our committees strive throughout the year to keep expenses down and revenue up. We are constantly looking for new and innovative revenue streams that contribute to our income and reduce our need to tap into our reserves. You can be extremely proud of your leadership – under the guidance of Past President Jack Edwards and through the efforts of the committee chairs, we ended last year well ahead of budget and did not need to use any of our reserves. Our budget for 2013 is $296,850.00, of which $25,700.00 is from asset reserves, and though this year is not yet complete, we are on track again this year to avoid tapping into our reserves. The entire Executive Council takes our fiscal responsibility very seriously and, as a result, WASFAA is in excellent financial shape!

Fall Conference time is here and many WASFAA states have been busy with preparations for their big event. On the horizon - Idaho, Alaska, Arizona, Washington and Nevada all have conferences in the month of October! It has been traditional for the WASFAA President to attend each of the State Conferences, but I realized early on that coming from Hawaii my travels were going to present two significant problems: continued on next page
first, traveling from the Islands generally requires an extra
day going and returning, making it impossible to make
it to each conference. Second, travel costs from Hawaii
tend to be rather high! In order to assure that WASFAA is
well represented at each State conference while keeping
expenses in line, I have asked for assistance from both
Past Presidents and our President Elect in representing
WASFAA at some of the State conferences. I’m happy
to report that a Presidential ‘type’ will be representing
WASFAA at each of the State Conferences.

The WASFAA/NASFAA Fall Training workshops will be
held from late October to December. These will be in
person workshops held at locations throughout our re-
gion. This year the training committee will be presenting
NASFAA’s Compliance and Campus Collaboration – R2T4.

Be sure to check out the article in this newsletter from Kay
Soltis, Chair of the Jerry R. Sims Management & Leader-
ship Institute, which will be held at the Handerly Hotel
in San Diego, California. Registration is now open on the
WASFAA web site.

If you have not already done so, I encourage you to sub-
scribe to the WASFAA blog – ‘The WASFAA Water Cooler’.
To subscribe, visit our home page at www.wasfaa.org, and
click on the link at the top of the page.

The sole purpose of the WASFAA Leadership is to serve
you, the membership, and we welcome your input and
feedback concerning the activities and services that the
association provides. We appreciate your support, and
look forward to serving you in the months ahead. Feel
free to contact me at green@tiphawaii.com with any
comments or input.

Aloha Nui Loa
Note from the Editor

Ashley Munro
Communications Committee Chair
University of Alaska Fairbanks

Fall has already come and gone where I live. In Fairbanks, we saw the first yellow leaves several weeks ago and since, have already watched everything turn to white. But, for most of you, fall is just starting. The students are back in classes with their pockets full of money, thanks to recently cashed refund checks. Faculty are back in their offices frantically writing academic plans and calling you with questions. It’s a busy time of year! The communications team wants to remind you that it’s easy, and quick, to stay in touch with WASFAA. You can refer back to this newsletter easily by visiting the website, subscribe to the WASFAA Water Cooler, our blog, at www.wasfaa.org to get announcements about regulation changes or training opportunities, or join us on LinkedIn or Facebook for quick reminders from WASFAA folks.

Happy Processing!

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Preferred format is high resolution quality PDF
Ads (PDFs) should be emailed to
Sun Ow, Fund Development Chair,
Sow@glhec.org

WESTERN ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
Recognizing Outstanding Achievement

Sandi Guidry
WASFAA 2012-13
Awards and Scholarship Chair

WASFAA President Jack Edwards presented the following individuals with these awards during the 2013 annual conference.

Lifetime Membership - This award is presented to an individual who has made continued and significant contributions to the financial aid profession and WASFAA. These individuals become members of WASFAA for life and will have WASFAA dues for individual membership waived for all future years. The award is approved and granted by a two-thirds majority vote of the Executive Council.

Doug Severs has been active in WASFAA for more than twenty years. He has served as Treasurer, President twice, been involved in every committee, presented numerous times at state, regional and national conferences. He has been on the NASFAA Board in numerous capacities, is on the Direct Loan Coalition Board of Directors, and works tirelessly in advocating for students, creating opportunities for their success in postsecondary education. He is well respected for his knowledge, leadership style and high personal integrity.

Honorary Lifetime Membership is given to individuals to recognize their outstanding and sustained contribution to WASFAA and the Financial Aid Community. The individual selected need not be a WASFAA member or a financial aid administrator, but may come from the political, educational, business, or other community. Nominations may be made by any member of the association and must be approved by a majority of voting members of the Executive Council. Recognition is given at the annual conference.

Carl Dalstrom will retire this year after more than 38 years of experience in the financial aid field. Carl joined USA Funds in 1989 and became their CEO and President in 2000. Prior to USA Funds he was a financial aid administrator at the University of Illinois at Chicago and at North eastern Illinois University in Chicago. During his entire career he has worked tirelessly to promote financial aid for students and his support of our profession has been endless. He had the opportunity to work at the National level, with extensive resources that he has directed to the enhancement of Financial Aid – for students and professionals alike. He has personally directed a variety of initiatives and participated in industry-wide collaborative efforts that have dramatically improved and made a lasting impact on our profession.

Distinguished Service - This award is presented to recognize the outstanding contribution of an individual to the field of financial aid through research, scholarship, and/or contributions to the association’s activities. It is not intended to recognize the efforts of officers within WASFAA for those efforts alone. The recipient does not have to be a WASFAA member.

There is no restriction as to the number of awards given each year. The award is approved and granted by a two-thirds majority vote of the Executive Council.

Ron Lee has worked for many years supporting the WASFAA mission. He has served as both WASFAA and CASFAA conference Program committee chair on several occasions. In addition he served as the Executive Council transition facilitator for two WASFAA Presidents. He has been committed to providing a quality training experience.

Sun Ow has chaired and co-chaired the Fund Development committee eight years including the past two years. She has exceeded expectations during these very difficult financial times. She has also served as WASFAA conference co-chair and served on the program committee.

Nichole Doering has made outstanding contributions to WASFAA’s number one Strategic Planning goal: Training. She took the leadership route by first serving as a committee member, becoming a co-chair to finally chair ing the committee herself. Training and the SDBSI represent intense involvement and commitment. She brings her skills and talents to result in high quality events that WASFAA can be mighty proud of.

Meritorious Achievement - This award was designed to be given to a person or persons who have made significant efforts to advance the awareness and understanding of the aid profession through new outreach programs, legislative action or significant support of association activities. The award is approved and granted by a two-thirds majority vote of the Executive Council.

Patricia Hurley has made significant efforts to advance the awareness and understanding of the aid profession through her many association activities. We are fortunate to have her as our Federal Relations Committee Co-Chair because her experiences on the CASFAA and NASFAA Federal Issues Committee. Reauthorization Taskforce, and numerous Negotiated Rulemaking teams have made her a wealth of knowledge. She is especially strong in speaking of the unique issues and problems facing community college students.

New Volunteer - This award is presented to a new volunteer with a WASFAA committee for the accomplishments and contributions to the Association in the year they first volunteer.

Lakia Wilson was a member of the 2013 Conference Planning Committee, as part of the marketing team. She is also member of the Ethnic Diversity Action Committee, where she was one on the most active participants. Even though she works at an Oregon school she came across the river to volunteer for the Southwest Washington College Goal Sunday.
Hello WASFAA members,

As the Fall semester begins and we are welcoming students back to campuses, it has kept many of ALASFAA members busy with processing financial aid. Though our board members are busy with their daily tasks on campus, they’ve been very diligent in planning our ALASFAA Conference set in October. This year’s conference will be in Fairbanks and we are excited to have Jack Edwards from WASFAA, Kim Wells from the Department of Ed, Anthony Lombardi with Sallie Mae and many other folks who will be presenting.

For those who are seasoned financial aid administrators, you know that there is a long list of financial aid myths and legends. This year it seems that the overall encompassing theme seems to fall under communication or lack thereof between financial aid people and the rest of the people on campus. Although we all speak English, somehow the language of financial aid is still foreign to many people that we work with especially in Alaska where folks are scattered all over from urban to rural areas.

In addition, the ALASFAA Board is working to rebuild the connections that have dissolved over the years as people transition in and out of the financial aid world. In doing so, we hope to bring a plethora of knowledge to our members and our campuses.

We are all looking forward to a great conference and a great year as we attempt to build a better financial aid community for all of us within and outside Alaska.

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The focus for most of this quarter has been our Fall Conference. This year the conference will be held in Mesa, AZ on October 24th and 25th. We are very excited about our speakers and our agenda. Justin Draeger will be our keynote. Bruce Honer from the Department will also conduct a few sessions. We also have representation from VA and OIG coming out to present.

This quarter we also had a few changes on our Board. Beth Armstrong had to resign as Vice President when she took the Director of Financial Aid job at Virginia Tech. Tom Rector from Sallie Mae, a long time AASFAA member, has agreed to take the role for the remainder of the year. Also, Raquel Garcia, our secretary, just took the role of Financial Aid Director at Brookline College. Congratulations to both Beth and Raquel on their new roles.

AASFAA Fall Conference
October 24-25, 2013
Mesa, AZ

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President – Ed Wagner, EDMC
President Elect – Diana Mateer, University of Advancing Technology
Past President – Howard Fischer, Ottawa University
Vice President – Tom Rector, Sallie Mae
Treasurer – Nicole Harral, Arizona Western College
Treasurer Elect – Mary Frances Causey, Prescott College
Secretary – Raquel Garcia, Brookline College
At Large Rep – Diana Dowling, Yavapai College
At Large Rep – Megan Paschall, University of Arizona
Melissa Moser  
Coast Community College District  
CASFAA President

The campuses across California are alive with new students and electrified with our returning students. As financial aid professionals we are busy with workshops, first disbursements, and implementation of the 150% loan regulations and the submittal of ATB information to COD. Welcome to Fall Semester 2013!

Aside from the campus activity, CASFAA volunteers created two training events sponsored by The Federal Issues Committee and the Proprietary Committee. Daniel Reed and Thomas Le did an outstanding job directing and creating these webinars. If you missed the webinars, they are available via recording on the CASFAA website.

The conference committee has been hard at work; registration is open, vendor information is posted, and room rates are down for CASFAA’s annual conference. Thank you to Deb Barker-Garcia in getting the early bird room rates. Make your reservations while the early bird rates are active. Last year, we welcomed CASFAA members “home” and this year we are “coming together”. This is the premier training event for California’s postsecondary institutions; plan your budgets and send your staff.

In a coordinated effort with the California Student Aid Commission and CASFAA’s High School Relations Committee (Co-Chairs Anafe Robinson and Dennis Schroeder) will be offering free of charge the High School Counselor Workshops. Workshops will be held in October and November across the state; registration will be opening soon. Of course, Bryan Dickason will be one of the speakers!

Conference Scholarships
This year, CASFAA will offer twelve conference scholarships. Scholarship applications will be emailed to all members and available on the website. Scholarships will provide the following:

- The cost of air transportation and a round-trip shuttle from the airport to the hotel (which will be arranged by CASFAA on my behalf), hotel accommodations, and the registration fee for the Annual Conference. Mileage will be paid at the current IRS approved rate for those within driving distance to the conference hotel. Rental cars and/or taxi service will not be reimbursed.
- CASFAA will provide a complimentary membership for 1 year.
- Covers the cost of meals during transportation to and from the conference and any meal not covered during the conference.

The Elections and Nominations Committee had an exciting slate of nominees for the 2014 Executive Council. Please join me in congratulating your newly-elected:

**2014 CASFAA Executive Council:**
**President-Elect:** Sunshine Garcia  
California State University, Channel Islands

**Vice President, Federal Issues:** Scott Cline  
California College of the Arts

**Vice President, State Issues:** Angelina Arzate  
Palomar College

**Secretary:** Denise Pena  
Vanguard University

**Treasurer-Elect:** Daniel Reed  
Point Loma Nazarene University

**Access and Diversity:** Thomas Le  
WyoTech Long Beach

**Segmental Representation:**
**Graduate and Professional:** Lina Bojorquez  
Southwestern Law School

**University of California:** Annie Osborne  
University of California, San Francisco

**Proprietary:** Emily Valdovinos  
Institute of Technology

**Community College:** Robin Darcangelo  
Solano Community College

**California State University:** Mason White  
California State University, Chico

**Independent:** Eileen Brzozowski  
University of Southern California
**WASFAA 2013 FALL NEWSLETTER**

**WASFAA STATE REPORTS**

**WFAA Report**

*Monique C. Thériault*

WFAA President 2013-14

**October in Leavenworth**

As far as I’m concerned, organizations are from head to toe, very much like a body. Does the toe say, my leg is apathetic today or does it bear with the inconvenience until tomorrow and do what it can to make the body go?

**It’s a simple equation:**

**Whole = all body parts moving together.**

I say this, because I was impressed with the content of our new EC-approved Strategic Plan. The Executive Committee believes that how the Association accomplishes its mission is as important as the mission itself. The manner in which we behave, treat each other and interact with others is critical to the successful implementation of our mission and strategic goals.

All our energies, or most all, are leaning into the fall conference in beautiful mountainous Leavenworth, Washington this October 23-25. If you’ve been to Leavenworth around the holidays, you know it’s cold and snowy and luminous with people walking from shop to shop to restaurants, to grills and bars. Not too many have a care so you can forget troubles and weariness for a convivial moment.

This October, you can meet colleagues, amble in the coziness of this small town and take advantage of the many sessions and activities carefully prepared by our conference committee. Our very own Kay Soflis will be there as WASFAA ambassador direct from Prince Green’s delegation. We love Kay who is an emblem of dedication and training savoir-faire, ever present, ever appreciated! Our state and federal liaisons will be there to keep us straight and unveil upcoming legislative and financial aid realities—a new cycle looms ahead so we hope you will join us!

Some recent accomplishments to be rolled out at the conference include the five-year Strategic Plan and Investment Policy Statement. Committees have been hard at work with summer training in July, membership renewal and now conference attendance. While we suffered the loss of a few good EC members, we’re gathering treasure members that will help shape a bright future including a livelier website with social media and a place to gather where substantial traffic is expected. Communication is the life thread of communities and the bread of aid administrators doing the bidding of students. So that will be for now the intersection of all roads to and from WFAA where we hope to meet you soon!

**Getting Involved**

*Jack Edwards*

Past-President Report

Are you interested in getting more involved with WASFAA? If yes, how about running for an elected officer position and serving on the 2014-15 Executive Council? Or do you know someone who would be interested in serving as an officer for WASFAA? The Nominations and Elections Committee is working on putting a slate of candidates together for elections that will occur in late November. The committee is looking for folks to serve as officers in the following positions:

**President-Elect** – this position requires a three-year commitment serving in the first year as President-Elect, second year as President, and third year as Past President.

**Vice President** – this is a one-year commitment.

**Treasurer-Elect** – this position requires a three-year commitment serving in the first year as Treasurer-Elect and then as Treasurer for year two and three.

**Secretary** – this is a one-year commitment.

**Representative at Large for Ethnic Diversity** – this is a one-year commitment and the officer serves as Chair of the Ethnic Diversity Action Committee

The online form for nominations and elections should be available by the time you are reading this article. Please go to [www.wasfaa.org](http://www.wasfaa.org) and submit a form. Serving as an officer is a great way to be a leader for our association. Watch for the ballot for elections to come out in late November.
**University of Oregon**

*Staci Miles* has transitioned from a Financial Aid Counselor to an Assistant Director. *Reed McCue*, a former student employee in the office, is a Financial Aid Counselor. *Christy Jones* joins the staff as a Financial Aid Counselor. She recently graduated with her Masters of Education in College Student Services Administration from Oregon State University. The Associate Director of Operations, *Jim Gilmour*, is retiring after 30+ years at the University of Oregon. You’ll be missed! *Mark Diestler* is the new Associate Director of Compliance. You may recognize his name as an auditor for the Department of Education in Region VIII.

**Pacific Lutheran University**

*Heather Alegre* comes to us from Northern Arizona University and brings her WASFAA knowledge with her! She joined our staff in April has a Financial Aid Administrator. *Craig Chamberlain* recently graduated from PLU and is now a Financial Aid Administrator. He brings knowledge of the Office of Admissions into the position. *Eileen Kemink* joined us in August from the University Development Office. She has a lot of experience working with donors and potential supports.

**Alaska Commission on Post-Secondary Education**

ACPE would like to welcome 3 new Customer Service Specialists to the team: *Taylor Hubbard* is a recent graduate from Whiteman College in Walla Walla, Washington. *Angelica Villalobos* is a graduate of University of Alaska Southeast in Juneau. *Heather Valleskey* joins us from the Southeast Alaska Regional Health Consortium.

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**Transitions**

*Jim Gilmour*

**Millions of Dollars**

*Wendy Olson*  
*Whitworth University*

When people ask me what I do for a living I will often tell them, “I give away millions of dollars every year.” That usually does a good job of catching their attention. But that being said, you would think that our jobs would be the best… every one thinking we are wonderful, that we can work miracles, and always happy sounds emanating from the financial aid office. The last week of summer vacation and the first week of the school year does have its occasional miracle moments and expressions of gratitude, but often there are tears and angst. There is the student who always wanted to attend, but now you are not making it possible. There is the parent who says, “I know you people can come up with something to help someone like my son; there has got to be some funds available somewhere.” And there is the student that came all the way from Pago Pago and barely has a clue that she is short $13000 for the year.

These first few weeks are full of trials and often make me wonder why I am in this line of work. There is no joy or glamor in tears and desperation. It is during this time that I must remember to step back, think about graduation, think about lives changed, and enjoy the presence of our student assistants who are glad to be a part of my school’s community and a part of the busy world of the financial aid office. The other way I get through these weeks is a reminder of times spent with colleagues who understand my world and who have been through these tough weeks. Through WASFAA (and WFAA) I have made many wonderful acquaintances and those acquaintances and friends have helped me see my job in new ways and have helped me deal with the trials and tribulations that come along. I am grateful to the voices that have provided support, advice, and been role models all along the way. Thanks to WASFAA for the opportunities you give to create lasting and meaningful relationships among colleagues. With the help of WASFAA and its members I think I will keep giving away millions of dollars every year.
Join us in the “Biggest Little City in the World”

Reno is located at the foot of the snowcapped Sierra Nevada Mountains with the Truckee River winding through the center of the city. Excellent dining options are within walking distance. Lake Tahoe is a quick 60 minutes away and well worth the drive.

Make plans to join hundreds of your colleagues in Reno!

The WASFAA conference provides attendees with the most current information in student financial aid. The Program Committee is developing topics/sessions that are sure to meet the needs of the membership.

Federal Issues  Default Management  VA Issues  Fraud
Proprietary Issues  Personal Development  COD Issues  Ask a Fed
Grad and Professional Issues  150% Direct Subsidized Loan Limits

See you in Reno, Nevada  April 13-15, 2014  Silver Legacy Resort
WASFAA 2013 FALL NEWSLETTER

Fiscal Planning Committee Update

Wendy Olson
Fiscal Planning Committee Chair
Whitworth University

On July 22, 2013, the Fiscal Planning Committee had their quarterly meeting. Here are some of the items that were discussed:

✔ Treasurer-Elect, Mindy Bergeron, provided the treasurer’s report. Mindy said that she has been reconciling accounts monthly and all appears to be in order, which our vice-president, Jeff Scofield, confirmed. She is planning to modify how investment information is reported so that it will be easier to monitor changes and trends. President Frank Green commented that the WASFAA investments were performing well. Mindy will continue to represent WASFAA on NASFAA’s Financial Advisory Committee where decisions regarding NASFAA’s and WASFAA’s investments take place.

✔ WASFAA was able to receive $2400 from the silent auction that took place during our annual conference in Arizona. These funds are designated for scholarships for WASFAA’s various training opportunities. Thanks to all who donated and also those who purchased items at the silent auction and thanks to Jean Russell for organizing the event.

✔ Kudos to Sun Ow and her Fund Development committee for their great work in raising funds for our organization. She and her committee have exceeded our budgeted income expectation by $5300 for a total of $43,300. These resources from

Ethnic Diversity Action Committee Update

Oscar Verduzco
Ethnic Diversity Action Committee Chair
Heritage University

Hello WASFAA Friends! The Ethnic Diversity Action Committee would like to share the participation of four new volunteers in its efforts to inform, recruit, and better prepare the ethnic diversity of our membership. Please help me thank Jodie M. Kuba from the University of Hawaii @ Manoa, Rachel Martinez from the College of Western Idaho, JJ Oliver from Washington State University in Washington, and myself, Oscar Verduzco at Heritage University in the heart of the State of Washington. To help us build on the great work already in progress we have six returning members volunteering to serve again! The Committee has started its work by looking for a scholarship recipient who exemplifies the benefits of being inclusive and promoting ethnic diversity in our association. We encourage WASFAA members that have not attended the Jerry R. Sims Management Leadership Institute (MLI) to apply and/or to encourage other young professionals that can benefit from this training to apply for a scholarship to attend this amazing training. Click button to Apply.

http://www.wasfaa.org/docs/toc_MLI.html
The Training Committee volunteers continue to work to support the training needs of our membership. Find out which of your colleagues are dedicating their time and efforts to your professional development this year at http://www.wasfaa.org/docs/committees/Training/index.html.

Spring Training
During May, WASFAA facilitated a professional development training opportunity designed to encourage and support future leaders in the financial aid industry. During the webinar entitled, “So You Wanna Be a Director,” Doug Severs, Director of Financial Aid at Oregon State University, shared his perspective on the challenges and rewards inherent in taking on the key leadership role in any financial aid office. Author of a series of articles in the WASFAA Newsletter, Doug’s advice is based on his personal experiences and observations as a Financial Aid Director, supervisor and mentor at several colleges and universities in the region.

A panel of experts joined Doug during the webinar to share stories about their own journeys. They also shared their recommendations for how to position oneself now to benefit from promotions and new career opportunities in the future. We’re tremendously grateful to the following panelists:

- Susan Murphy, University of San Francisco
- Kevin Jensen, College of Western Idaho
- Wendy Olson, Whitworth University

If you missed this webinar, watch for a WASFAA list-serv announcement soon with instructions for accessing the recording.

Fall Training
Workshops will be held during October and November at certain locations throughout the western region. For those who are interested in this training and are unable to attend a workshop, this training will also be offered by webcast during December.

This fall’s training will focus on the Return of Title IV Funds, using training content and resources developed by NASFAA. Participants will:

- Learn how to ensure compliance with the Return of Title IV regulations;
- Explore challenges related to students who withdraw from programs offered in modules;
- Examine the positive effects of campus collaboration;
- Exchange best practice tips with colleagues.

In addition to addressing the needs of financial aid office staff, this is the perfect opportunity to involve a wider audience – including academic advisors and staff from the Registrar’s and Business offices at most schools. Get your larger campus community involved in understanding how this important regulatory requirement affects both students and staff.

Watch the WASFAA list-serv for further information, including locations and dates for Fall Training.

Let Us Know How We Can Help
WASFAA’s mission is to promote student financial aid and educational opportunities for students by providing personal and professional development to its members. The Training Committee supports this mission by identifying training needs, selecting qualified trainers and making quality training programs accessible to WASFAA’s members. If you have suggestions for future training – or if you’d like to join us in supporting your colleagues as a Trainer – let us know. Our contact information is available at: http://www.wasfaa.org/docs/committees/Training/index.html.

We always appreciate hearing from you!
Have you been in the financial aid profession for a few years and looking to bump up your skill set? Well we have a wonderful opportunity for you! WASFAA will be hosting the 2013-14 Jerry R. Sims Management and Leadership Institute on November 20–22 at the Handlery Hotel in beautiful San Diego, CA.

The Management and Leadership Institute is a more advanced track training opportunity for those professionals looking to grow beyond their current expertise. We have many training venues that are the nuts and bolts of financial aid administration but not as many that explain the day to day operations and management that are relevant for an Assistant, Associate or Director of Financial Aid.

This year we have packed the schedule to get more “bang” for your training dollars. We are offering over sixteen contact hours of leadership training with sessions that include materials from the NASFAA book You’re the Director, A Guide to Leadership in Student Financial Aid. In addition we will have guest speakers- with expertise on Personnel Issues as well as Counseling and Support Services for at Risk Students. Our financial aid faculty will discuss How to Run Efficient and Effective Staff Meetings and How to Advocate and Market the Financial Aid Office on Campus. These are just a few of the many sessions we will be offering. A complete list of sessions and times is listed on the WASFAA website.

WASFAA is offering the Institute this year at the same price as has been offered the last three years $675 to WASFAA members to include training, room, meals and all instructional materials. (See list of all meals included on the WASFAA registration site, www.wasfaa.org/docs/toc_MLI.html) We are also offering this year a return of the commuter price. If you are living in the local area and can commute to the Handlery Hotel your registration fee will be $455 for training, instructional materials and all meals with the exception of dinner on Thursday.

We have moved the venue to a new location and one we believe will draw more of those who may want to enjoy a mild late fall environment – sunny San Diego, where the average temperature is 68 degrees. We provided one evening free of scheduling as an opportunity for you to enjoy San Diego on your own. More will be discussed about the local area – what to do and where to go – in future communications about MLI. Many former attendees have expressed that MLI is a true value for their limited dollars. Here are just a few of the testimonial from a former attendee:

“After years of wanting to attend the Management and Leadership training, I won a scholarship through WASFAA and was finally able to attend. The training was packed with useful information that I can use as a manager both immediately, and in the future. Networking with my peers was also very helpful, because we were all upper management and motivated to make connections at the training. It’s also the type of training that’s enhanced by the participation of the group, and because of that, you could attend year after year and still get more than your money’s worth from the training. I highly recommend this training to all Financial Aid Management Positions.” - Corinne Soltis

WASFAA Management and Leadership Institute is specifically designed to provide training to a limited number of attendees. The Institute normally limits the number to no more than thirty attendees. This limit is set to allow each attendee to receive a more personal experience, personal attention, professional development and the best opportunity to network with other attendees and the faculty. Training will be provided in a variety of teaching methods as people learn differently.

Please register on line at www.wasfaa.org/docs/toc_MLI.html as soon as possible to secure your position at the WASFAA 2013-14 Management and Leadership Institute.
As a director you probably will be faced with challenges in working with the financial aid office area. Most of the offices I have worked in had challenges with providing room for staff and the student traffic. I think that a lot of challenges that financial offices face are because financial aid is the relatively new area in student services as compared to say admissions or registration. The financial aid office area may be too small with employees and students jammed together in a less confidential situation. Or the office needs some serious upgrade of paint, carpeting and furniture. Directors are challenged to find the funds and/or space to solve these issues.

When you interview for a director position be sure you pay attention to these area issues as they will be your challenges once you are in the director’s chair. Even if the school indicates that they have plans for additional space or upgrades, realize most of time things like this take time. This is very true if the additional space is controlled by another area and they haven’t moved from the space. But, during your honeymoon year may be your best chance. Just always remember that peoples’ office area is a very sensitive issue and they will fight to keep it even when they would be moving to what would be considered a better area. Tread lightly when looking for additional space or a new area!

My experience at working at various institutions has shown me that most schools do not have a plan or financing to keep offices up to date in paint, carpet and furniture. These schools expected departments on their own to come up with funding these ongoing expenses. And it wasn’t like they added funds to our budgets to finance this. At one of my prior schools we had this terrible orange carpet that was ugly, worn and hazardous as it began to come up in different spots. One day I went into the school’s purchasing department to plead for new carpeting. I thought I had a great case for support until I looked down to see that they had the very same orange carpet that was in worse shape! The school must have bought a boxcar load of it (though it was in the school color!). The director for purchasing was actually very considerate and able to help provide half of the cost. I worked with my boss for the rest. At that time we also were able to use a student organization to paint the office as a fund raiser. While it was not professionally done, it was good enough! So, as a director be persistent with your requests and think outside of the box for funding.

The people at your school with the funds to support space and refurbishing may not care if the financial aid office staff works in poor conditions, but they may be really concerned if the students are negatively impacted by visiting your office. So, if you can document that the office has students in a non-confidential space being counseled about confidential situations or are handicapped and having difficulty getting around in the office or any other situation that will negatively impact students, you will have a better chance of getting what the office needs.

Getting and keeping an office in good shape is an ongoing task for a financial aid director. Use patience and persistence. I am still waiting for new carpeting here at OSU... and still being persistent!
Money Management Tools for Students

Kevin Struckhoff
TG Assistant Vice President for Relationship Management and Consulting

Technology keeps getting better and easier to use. The editing gear available for today’s high school film students is of a higher quality than the old-school equipment pros used not too long ago. New “smart” thermostats are saving energy and keeping homeowners cool. Camping out? You might consider taking along a lightweight solar panel to recharge your batteries.

What’s true across in these contexts applies as well in managing finances. For adults, money management sites like Mint.com, software like Turbotax, and any number of personal finance apps have greatly simplified keeping track of money: how much comes in and when and where the funds are spent. In many cases, these are add-on services rather than products consumers must purchase. According to a 2012 U.S. News and World Report article, about one in four financial institutions make online tools available to customers. In short, consumers who used to dread the whole budgeting process are a few clicks away from colorful pie charts mapping spending categories, projections for the next month’s bills, and targeted savings accounts for fun things like vacations.

This boom in personal finance technology isn’t geared only at adults, either. There are many resources available for high school and college students, and these resources can help with learning about money management, clarifying the variables in key financial decisions, and better understanding the downstream consequences of upstream choices. Many of them, such as Budgetpulse, are free. Different sites offer different tools, and students may benefit from money management tools that help them make informed choices with regard to topics such as spending plans (budgeting), responsible use of consumer credit, understanding student loan repayment, and even how choice of academic major may affect future income.

Budget Calculators
The Department of Education’s website, like many student-oriented websites, offers a budget calculator. This tool allows the student to enter expenses by category and see how choices in one area affect resources in another. Watching the outcomes change as different values are entered may get students’ attention in a way that parents’ explanations sometimes fail to. Other sites, including www.bankrate.com, also offer budget calculators that students may find helpful.

Credit Card Calculators
You’ve no doubt seen the seductive approach of credit card offers geared to students who are all too often unable to understand the terms to which they’re agreeing. No interest for six months? Woo-hoo! Of course the interest may then skyrocket, meaning the effective rate on purchases made during the “free” period turns out to be quite high. Credit card calculators, like the ones available on Bankrate, may help students see through the monetary sleight-of-hand and make better decisions.

Student Loan Calculators
By definition, student loans are a particularly important area of student financial decision making. Borrowing to pay for higher education is often a very good investment, leading students to high-earning careers and low unemployment. That’s a strong return on investment! Overborrowing, though, can lead to years of being burdened with debt, and a sense of bewilderment. “How did I get into this mess?” borrowers may wonder.

Loan payment calculators, such as this one from FinAid!, help to reduce that confusion by giving students a better chance to understand the consequences of borrowing decisions.

Historical Archives Update

Ashley Salisbury
Historical Archives Chair

President Frank Green charged this year’s 2013-2014 Executive Council with a “Disaster Recovery” mission. As part of that mission, it is each of our duties to develop ways to ensure that each of our committees, as well as the association as a whole, has a plan to secure all historical and current data and documents. The Historical Archives Committee has moved forward with a plan to set up a zcloud service as our main source of documentation back-up. This will ensure the security of the association’s vital documents. The cloud service will be up and running early this fall.
If You Build it, Will They Come?

The Benefits of Using Social Media in the Financial Aid Office

Sun Ow
Senior Marketing Associate
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Higher education at large has responded to the social media boon by strategically utilizing Facebook and other platforms to improve admissions, yield, community relations and even alumni giving. Why then, has the financial aid community been slower to respond? Concerns about office resources and how and when to post content are the most common reasons offered by aid leaders when asked about their lack of a social media presence. Ironically, schools with a successful financial aid social media presence have reaped substantial returns on investment with minimal use of staff time when they have deployed a strategic approach to a social media plan.

“Start with your mission,” advises Amanda B. Carter, associate director of financial aid at the University of Rochester. “We made the decision to enter the space based on who we are as an aid office and our desire to communicate more regularly with students.” The University of Rochester successfully launched a Twitter account for financial aid in January and currently uses it to push out critical information about deadlines and policies. Strategically, they made the decision to only adopt Twitter and to continue to share a Facebook presence with the admissions office. Carter reports that one staff person is responsible for posting tweets and monitoring responses and generally spends about 30 minutes a day on this effort.

Northeastern University took a broader approach to using social media tools. “Financial aid offices often have a difficult time building trust and good communications so we saw social media as an important strategy for us,” explains Jim Slattery, Senior Director of Financial Aid. Anya Morozkina, assistant director of communications and administration for the office, and the staff person responsible for the social media presence, concurs, “We wanted to change the perception among the students about the aid office. We are not the grinch on campus. We want students to know that they can reach out to us and we are ready to help them.”

Morozkina notes that Northeastern’s strategy is focused on gaining a larger student audience and improving perceptions about the office. As a result, they have implemented a long term plan for posting content and update their Facebook page every other day. Content updates might include information about broader financial aid topics including articles reposted from NASFAA and other financial aid sources. Morozkina also recommends seeking topical ideas from student employees. “They know what their peers want.”

Liz Gross, previous director of university marketing and communications at the University of Wisconsin-Waukesha, also encourages aid offices to embrace social media as part of their mission to serve students. “Social media can allow you to inform, connect and make a positive impression. Most aid offices are still thinking about it as only a one-way communication platform.” She notes that aid professionals need to think about “the social media space as a community where you can publicly help students solve problems. It’s really a way to turn your complainers into your champions.”

Fullerton College has successfully embraced Facebook as an opportunity to improve customer service and student impressions about the financial aid office. Greg Ryan, director of financial aid, notes that their Facebook presence allows them to respond to student concerns within minutes and has resulted in dramatic decreases in phone calls to the office and shorter lines during peak periods. He also reports that over the three years since Fullerton implemented a Facebook page for the office, the amount of time he spends responding has diminished. “The student community now does most of the work. Students respond to each other and answer financial aid questions through the community page. And also publicly thank the office when we’ve been responsive to their concerns.”

Gross says that Fullerton’s experience is exactly what the goal should be for the financial aid office in the social media world: “You need to think about cultivating a community over time so that students begin to answer the questions for their peers. That’s what you want in the long run. Students want to hear from other students about how to resolve processing or deadline issues.”

Financial aid offices that have developed a social media presence based on strategy have successfully improved student service and campus perceptions about their office. As Gross sums up, “A social media presence provides public proof that your office is there to help.”

Suggestions for starting your financial aid office social media effort:

- Start with your mission and build your communication plan from there.
- Build a semester-long communication calendar so you can plan content in advance.
- Refresh your content as often as you can—every other day if possible.
- Use student employees to help write content and respond to posts.
- Develop a social media policy in advance, including guidelines for how you will handle derogatory comments.
Student Financial Literacy Explained

Jacquie Carroll, ED.D.
Campus Engagement and Education Consultant
American Student Assistance® (ASA)

Recently, it seems that the events in the last decade have generated not only a national discussion, but also more educational community discussions about the importance and impact of student financial literacy, personal finance, and financial responsibility. Many times these terms are used interchangeably, which tends to make things a little muddled for everyone—particularly for students. Too often, students equate financial literacy with financial aid. That’s why before we embark on the discussion and try to provide potential solutions, it’s important to understand these terms as they represent the roadmap to success.

Financial literacy is the foundation, and it provides key concepts, principles, and technological tools that are fundamental to being smart about money. These key concepts are more easily digested by students when they relate to events that have an impact in their lives. If there’s no immediate connection, the information doesn’t seem to stick. For example, many financial aid administrators have seen that students aren’t interested in their student loan repayment options during the entrance counseling process—but these same students perk up significantly during exit counseling. People in general will pay attention when their world changes. What’s important in these initial stages is to identify truly teachable moments for students. Many institutions are wrestling with this issue and trying to figure out which financial competencies are essential in students’ lifecycles; what should students know at the end of the first year, second year, etc.? They’re primarily focused on student success while students are attending their institution. Once students have that basic financial knowledge, the next step is to understand how those financial facts and concepts relate to students’ personal and family resources. That’s all about personal finance, and many times that focus tends to shift to after college.

Individuals spend, save, protect, and invest their resources in an effort to achieve financial success. In their first few years after college, students’ resources are largely monetary. Students typically equate financial success with wealth; they don’t realize until later in life that that’s not necessarily the case. Financial success should be defined as achieving one’s financial goals, and this is where they move from knowledge and understanding to action and changing behaviors.

The next big step for students after graduation is to achieve their financial goals. Even for an optimistic student, this process is easier said than done. Students who’ve been subsisting on a variety of Top Ramen delicacies soon realize that “real life” takes much more of their income than first suspected. It seems like everyone is putting a hand out for a piece of that paycheck: taxes, insurances, student loan repayment, basic living expenses, etc. It all goes very fast! Again, as part of the college community discussions, institutions are trying to identify ways to help support and create student financial success after graduation, in part because alumni’s personal finances impact institutions; financially successful alumni are much more likely to give back to their alma maters than those who are not.

Ultimately, personal finance provides the foundation for financial responsibility and financial responsibility is the action that puts people and organizations on the path to financial success. Financial responsibility also implies that individuals have accountability for their financial well-being, now and in the future—a long-term commitment. Institutions are helping students be accountable to themselves and their communities by providing opportunities for learning about financial literacy, personal finance, and financial responsibility. Opportunities can range from providing formal financial literacy education to informal education such as helping students understand goals.

Financial responsibility is defined by action and accountability for one’s financial well-being, now and in the future. And there’s no better time than the present to help students understand the basic terms—the first step on the road to financial success.

Summer Institute Dates Coming

Nichole Doering
SDBSI 2014 Chair

Plans are being made for Sister Dale Brown Summer Institute 2014. This will be a Summer Institute’s 30 year anniversary, and we hope you’ll join us for this training event and celebration.

The Basic Track will run for the full week and will focus on basic fundamentals of financial aid. If you are new in the financial aid community, this training will provide the foundation for your career ahead.

We will again offer our shorter Intermediate and Clock-Hour Tracks. The Intermediate Track will provide a more advanced level of understanding in the financial aid topics, and is a good follow-up to the Basic Track training. The Clock-Hour Track will provide training on the same subjects as the other tracks, but with the focus on how to apply the information to a clock hour training program.

We will announce dates and location for SI 2014 in the near future. Should you have any questions about Summer Institute, please be in touch and ask.
National Celebrities Visit Alaska for College Prep Competition Victory

Christina Campbell
Alaska Commission on Post-Secondary Education

“Future Forward Challenge”

After taking first place in the country in the “Future Forward Challenge”, Bethel Regional High School in Alaska was rewarded with a visit in late August from NBA star James Harden of the Houston Rockets, rapper Kendrick Lamar, MTV’s Sway and CEO’s from both Taco Bell and Viacom.

The “Future Forward Challenge”, sponsored by the National College Advising Corps (NCAC), Get Schooled and USA Funds, motivates students to prepare for the future by engaging in friendly online competition. Schools earn up to 100 points via online games and other activities - the school with the most points earns a “Celebrity Principal for a Day”.

The competition took place over a three-month period last spring between 389 Advising Corps partner high schools across the country. Alaska took 1st, 2nd, 11th, and 15th place in activities that engage students in college awareness and FAFSA completion.

With a top total score of 99 points, Bethel Regional High School was awarded the grand prize. Students at Bethel posted a 61% FAFSA completion rate (vs. 41% nationwide), conducted 175 scholarship searches, played 2,300 educational games, and left 1,200 discussion board comments during the Challenge. This was a hard-earned and well-deserved victory; especially considering that in 2007 BRHS was labeled a “dropout factory” after statistical analysis reported by Johns Hopkins University indicated that 60% or fewer students from BRHS ever made it to their senior year of high school.

Close behind BRHS, North Pole High School tied with Validus Preparatory Academy from the Bronx, NY, for second place. Lathrop High School in Fairbanks takes 11th place, and Skyview High School in Soldotna landed in 15th.

“In high school, work on being a leader now,” Lamar told the students at BRHS. “If you’re a leader now, you’re ahead of the game”.

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