Hello, all. I’m honored to serve as WASFAA President in 2019-20 and look forward to meeting and speaking with as many of you as possible over the next year, either at one of our WASFAA training conferences or at your individual state conference.

WASFAA is an incredibly strong organization, built from the ground up on its members’ work. Each day, I am reminded of our members’ dedication to student access and success across our institutions and with outside partners. Through its all-volunteer leadership under our current President, Ashley Monroe, this organization has seen incredible success over the past year: in training, advocacy, and innovation. I look forward to building upon this strong foundation with our WASFAA leadership, volunteers, and members over the next year.
A few items to look forward to over this next year: another amazing Sister Dale Brown Summer Institute this June on the campus of Gonzaga University in Spokane, Washington; additional fall training series either in your state or at your state conference; the Jerry R. Sims Management & Leadership Institute in November led by an extraordinary faculty; and last, but certainly not least, the return of the WASFAA Annual Conference to Hawaii in the spring of 2020. At the same time, WASFAA committees will be at work on strategic planning to set up WASFAA for the next five years, by launching a new website along with membership management systems which will streamline and amplify our message. These are just a few of the activities WASFAA will focus on over the coming year.

Please reach out to me. I would love to hear your thoughts, ideas, and feedback about what can make WASFAA more successful and how we can support you and your institutions as we work together to achieve our goals.

Scott Cline
WASFAA President
2019-2020

Ashley Munro
Associate Director, University of Alaska-Fairbanks
Fairbanks, Alaska

The 2018-2019 WASFAA year has ended and I’m going to miss working with the executive council members. I have appreciated the support from committee chairs and elected officers over the last year. Year-end reports are rolling in and I’m impressed with the trainings offered, events planned and behind-the-scenes work completed. I am both relieved and sad to hand over the gavel to Scott, but am excited to see what the next year brings. I can’t wait to celebrate with you all in Arizona in a few short weeks!

Ashley Munro
WASFAA President
2018-2019
Hello WASFAA!
Welcome to the first newsletter of the 19/20 membership year. I’m excited to be serving as the WASFAA Communications chair this year. If you will be at the Conference in a few weeks, I’d love to meet you! Please feel free to say hello! I’m still looking for a few new committee members for this year. If you’d like to learn more or would like to join the Communications Committee, please reach out to me at david.downing@asu.edu!

WASFAA 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.

WASFAA Social Media Links

If you would like to send any feedback or contribute to the newsletter, please send your articles or submissions to communications@wasfaa.org by May 20th.

Newsletter Ads

Newsletter ads are a great way to advertise your products and services. The newsletter will be published electronically on a monthly basis. To purchase ad space click here.

Cost for 3 months:

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

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.
JOB POSTINGS

Visit the JobLinks page on www.wasfaa.org to find more details on the following listings:

**Assistant Dean of Student Enrollment and Financial Aid/Registrar:** Walla Walla Community College; Walla Walla, WA. Open until filled.

**Compliance & Training Officer:** California State University; Sacramento, CA. Open until filled

**Director of Student Financial Aid Services:** Pacific Union College; Angwin, CA. Open until filled.

**Assistant Director of Financial Aid Systems:** Western Oregon University; Monmouth, OR. Open until filled.

**Director of Financial Aid and Affordability:** Crossroads School for Arts & Sciences; Santa Monica, CA. Deadline: 4/24/19.

**Financial Aid Advisor:** American College of Healthcare Sciences; Portland, OR. Open until filled.
WHO WAS SISTER DALE BROWN?

Cassie Zimmerlee  
Financial Aid Advisor, Lane Community College  
SDBSI Committee Member

If you’ve had the opportunity to attend the Sister Dale Brown Summer Institute (SDBSI) you may have asked yourself this very question, “Who was Sister Dale Brown?” I know I did when I had the opportunity to attend the Institute in 2016. My first thought was “Sister, as in a nun? Is my Director sending me to a religious retreat?” I immediately looked it up on the WASFAA website to get more details.

Within our first few hours of the institute, we were introduced to faculty along with a brief recognition of Sister Dale Brown and her realizations of the importance of training. Personal details regarding Sister Dale Brown were not revealed. This of course, is my recollection of that very busy afternoon where we had layers of information heaped at us. I may have missed those details. After all, any financial aid information was new information for me and I felt like a deer in the headlights.

As a committee member for the 2019 SDBSI, I was asked to write an article about Sister Dale Brown. I was thrilled. Finally, the cloud of mystery surrounding Sister Dale would be lifted.

Sister Dale Brown was a nun from the Community of the Holy Spirit. She taught high school for several years before joining the financial aid staff at the University of San Diego in 1979. She was keen and immediately recognized the need for training of new FA administrators and started facilitating local trainings. Still, I wanted to know more about her.

An email was sent out to those who knew and worked with her. It’s been 14 years since the passing of Sister Dale and many of the folks who knew her on a personal/professional level have retired or are on the brink of retiring. There were just a handful of responses, but they were heartfelt and insightful.

From the responses we did receive it is evident that she was driven, knowledgeable, passionate, a wiz at federal methodology, personable with a witty a sense of humor, and well loved.

When Judith Logue was asked about Sister Dale Brown, her response beams with admiration.

“I knew Sister Dale well and respected her tireless outreach as a Financial Aid Trainer for members of CASFAA, WASFAA and NASFAA. With her experience as a teacher, she was an outstanding Financial Aid Trainer. She was entertaining as well as very informative - so she was very effective. In addition, Sister Dale served in many other capacities for CASFAA, WASFAA and NASFAA. She received multiple awards from all three associations.”

A current and longtime SDBSI committee member, Mike Johnson also added how he first met Sister Dale:

“...I was on the 1995 Summer Institute faculty with her, Lois Kelly, Julie Arthur, and Ted Malone. Her knowledge of need analysis, her ability to explain it, and - just as importantly - her feelings about it were a big reason that I found it fascinating and wanted to learn as much as I could about it. I always looked to her as a role model, and I was grateful that we remained friends and colleagues.”
I found Mike’s comment to be enlightening. He was also teaching at the 2016 SDSBI when I attended, and I will not forget his personal stories of how he hand calculated stacks of waist-high student files. Finding meaning behind need analysis was, I am sure, a necessity with that daunting work load. Dear Sister Dale, how things have changed!

Another response that strongly resonated with me and illuminated what I was yearning to know came from Lois Kelly. Lois writes of a more personal relationship with Sister Dale. I hope you too will appreciate her insight.

“Dale and I both were raised in Oakland, CA. After I moved back to the WASFAA region (from MASFAA), we discovered our mutual stomping grounds and that we had friends in common. In fact she was best friends with the older sister of my childhood best friend with whom I speculated what it was like to become a nun when Dale went into the convent. I did not know Dale at that time, just that she was this friend of a neighborhood family. I was fortunate to teach at several summer institutes at the University of San Diego while Dale was there. She was the local chairperson as well as a guest lecturer for the institute and of course, she was the instructor for federal methodology. Oh my goodness, that woman was more than an expert on FM and its history. She was always able to provide not only the reason the methodology and tables were as they were but also lots of examples of how this provided equitable calculation of a family’s ability to contribute to educational funding. Over the years, that equity may have eroded but in the beginning it was there and Dale could tell us how and why it was. Dale always had to have a room with a window that opened to the fresh air. Many hotels were hard pressed to ensure that option for her but it was something she always required. In fact, when her building was renovated at USD, she HAD to make certain her office had not just a window, but a window that OPENED. And she got it. Long conversations with Sister Dale always resulted with me learning something old and something new. She had a long memory and could go back years into the history of a committee’s beginnings (need analysis, for example) and evolution (to FM). She was not only a trainer for the summer institute but also for the federal training programs when a school aid professional was included as part of the training staff. Many times I sat in federal “train the trainers” sessions and was amazed by the articulate reminders from Dale about the history and changes in need analysis that she could recite.

I miss her and am so glad that her name is attached to the Summer Institute training program for new aid administrators!!”

Several years after the passing of Sister Dale Brown, the WASFAA Summer Institute was renamed the Sister Dale Brown Summer Institute in honor of her great efforts to keep financial aid administrators informed.

For more information about the SDSBI, please go to the WASFAA website. I hope to see you there!
REGISTER TODAY FOR THE SUMMER INSTITUTE!

You can earn NASFAA Professional Credentials at the WASFAA Sister Dale Brown Summer Institute. A professional credential benefits you by:

- Expanding your student financial aid knowledge
- Improving your job performance and service to students
- Providing tangible evidence of your knowledge for employers
- Differentiating between you and less qualified personnel
- Giving you and your organization a competitive edge

Currently, Financial Aid Administrators in the WASFAA region have earned over 2,000 NASFAA credentials! Each NASFAA credential costs up to $400 for learning materials and testing; however, attendees at the WASFAA Sister Dale Brown Summer Institute can earn up to 13 credentials for the registration price of $790. A NASFAA Credentialed faculty member will teach each topic offered. After completion of the institute, attendees will have access to the set of learning materials and credential tests in their assigned track.

<table>
<thead>
<tr>
<th>NASFAA Topic</th>
<th>Beginner Track</th>
<th>Intermediate Track</th>
<th>Advanced Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Capability</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Application Processing</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Cash Management</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Consumer Information</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Cost of Attendance</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Direct Loans</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Needs Analysis</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Packaging &amp; Overawards</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Professional Judgement</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Return of Title IV Funds</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Satisfactory Academic Progress</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Student Eligibility</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Verification</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

X Indicates registered attendees will have access to materials and NASFAA credential test for these topics.

Visit the 2019 Summer Institute Website for more information and a draft schedule to help determine which track is right for you and register today!
Happy Spring (with apologies to those in our region who still have snow)! With so many exciting events forthcoming, I thought it would be a good chance to catch up everyone on what the Training Committee (TC) is planning. First, I’d like to thank the 2018/19 TC members who did an amazing job delivering our regional training content, “You Said What?! Effective Communication Tools A-SAP.” In case you missed it, you will have one last chance to attend this year, as a pre-conference session at the WASFAA 50th Anniversary Conference in Tempe on May 20, from 8:00 – 11:30 a.m. Participants will have the opportunity to take the NASFAA-U credential test on Satisfactory Academic Progress (SAP) and receive a copy of the book Crucial Conversations: Tools for Talking When the Stakes Are High. Don’t worry if you didn’t sign up when you registered for the conference, as we will be able to register you on site. Just show up at 8:00 a.m. and we will take care of the rest!

Also at the WASFAA 50th Anniversary Conference, TC Members Daniel Lemus and Nicole McMillin will deliver a training session on Need Analysis & EFC Calculation. Performing a “hand calc” of the EFC is a rite of passage for financial aid administrators, so if you’ve never done it, or it’s been a while, consider sharpening your skills!

We are thrilled to announce that the TC was selected to present at the NASFAA Conference in Orlando next month. Sarah Everitt, Ashley Munro and I will reprise last year’s regional training topic, “Reimagining the Financial Aid Experience.” Because this material is based on the Disney management book, Be Our Guest, it is quite opportune that we will be presenting it at Walt Disney World! Thalassa Naylor, the co-chair from that season, will be moderating the session and hopefully using her remarkable photography skills to capture some shots for posterity! We’ll be sure to let you know how that goes in a subsequent newsletter. The trainers are looking forward to delivering these sessions at both Sister Dale Brown Summer Institute (SDBSI) and the WASFAA 50th Anniversary Conference, in preparation for facing the national stage.

Last but certainly not least, we are pleased to announce the members of the 2019/20 WASFAA Training Committee, most of whom will also serve as guest faculty at SDBSI in Spokane next month. This will be an exceptional opportunity for new members to practice and enhance their training skills under the mentorship of our seasoned trainers, while getting a taste of the unique experience that SDBSI offers. Thank you to all who volunteered, and we look forward to seeing you all at one of these upcoming spring and summer events, or at a regional training site near you this fall!

Aurie Clifford, Pima Community College, AZ
Shawn Domingo, Chaminade University, HI
Sarah Everitt, Gonzaga University, WA
John Paul Gampon, Kapi‘olani Community College, HI
Cerita Grotts, Loyola Maramount University, CA
Angie Harris, Mills College, CA
Daniel Lemus, Boise State University, ID
Nicole McMillin, Idaho College of Osteopathic Medicine, ID
Frank McPherson, College of Southern Nevada, NV
Ashley Munro, University of Alaska – Fairbanks, AK
Thalassa Naylor, Sallie Mae
Debbie O’Dea, Southern Oregon University, OR
Tiffany Reed, Embry-Riddle Aeronautical University, AZ
Cassie Zimmerlee, Lane Community College, OR

Ashley Munro & Anthony Morrone after presenting at PacFAA Conference in March.
It is a beautiful time of year here in Pullman, Washington! It is always refreshing to see the school come to an end, lots of chicken dinners, and graduation parties. My wife and I will have the privilege to host our own graduation party for our youngest daughter who will be graduating from high school and receiving her AA degree.

This is my last month severing on the WASFAA Executive Committee. It has been an incredible two years learning about all the unique needs of our financial aid community in each of our nine states and the region as a whole. The Washington Financial Aid Association (WFAA) is actively making our annual leadership transition. Sarah Everitt, current president-elect and Director of Financial Aid at Gonzaga University, will assume the presidency on July 1st. She brings a wealth of experience and ideas to associational leadership. Sarah and I both are looking forward to welcoming WASFAA to Spokane, WA June 10 – 14, 2019 for the Sister Dale Brown Summer Institute. In addition to the opportunity to make new connections and further develop your professional knowledge for the NASFAA Credential Exams (from basic to advance tracks). There will be ample opportunity to explore the natural beauty of the local parks along with great food and pleasant weather.

We are also pleased to announce the dates and locations for state conference for the next two years will be in Yakima, WA. The dates for October 22 – 24, 2019 and October 19 – 20, 2020. The location is the same as last year’s conference which was beautiful and very popular for being centrally located. Michelle Story and Laura Aguiar from Heritage University have agreed to serve as our co-chairs for the conference. Additionally, Isabel Mancini of Seattle Pacific University was elected as our new state association treasure. I appreciate all of the members of our associations and especially appreciate those that volunteer to serve as leaders.

Our state legislature continues to remain very active in supporting higher education. One of the more impactful bills will be Workforce Education (SHB 2158) which establishes a statewide free college program by changing the state need grant to the ensuring funding for all students and established a new low-interest state loan program. Some of these efforts are designed to engage more former adult learners to pursue postsecondary education. Our state has worked in partnership with the Lumina Foundation to enhance the support of career-minded adults. Currently, financial aid administrators across the state are waiting to see how the final version will look once the state budget is passed and signed.

Thank you for your service and the difference you make in the lives of our students and families each and every day!
THERE IS STILL TIME TO ATTEND!

The 50th Anniversary Conference is a Couple of Weeks away!
Visit our conference website to Register!

Can't join us for the conference? You can still join us for the party!
Click here to Register for the 50th Celebration Reception!

For just $35, you can sign up for one of our two different Pre-Conference Sessions. If you plan to attend the conference, you will want to take advantage of this great deal!

You Said What?! Effective Communication Tools A-SAP: Learn and practice new skills to assertively communicate and negotiate in critical situations. Session includes Satisfactory Academic Progress (SAP) NASFAA-U credential preparation, study guide and credential test voucher. Registrants for the pre-conference will also receive a copy of the book Crucial Conversations: Tools for Talking When the Stakes are High.

The Basics of Enrollment Management: Enrollment management models are being developed at schools across the country. The financial aid office should be involved in the development of the plan, to create a comprehensive strategy that includes all students at all stages in their education. Our colleagues at the Pacific Northwest Association for College Admission Counseling (PNACAC) will share their experiences including some comparisons of some common differences in the discussions at public versus private institutions with enrollment management including setting enrollment goals, marketing, financial aid awarding strategies, tuition revenue modeling and data analysis.