Change–It’s Inevitable, Waiting–It’s Inevitable

Mindy Bergeron
Director of Financial Aid,
John F. Kennedy University
2010 WASFAA President

I have been tossing around some ideas in my head the last few days on what I should write for my final newsletter article as WASFAA president. I’ve been thinking about some of the highlights during the past year while serving as WASFAA president and some of its low points. The good news is, there haven’t been that many low points or all of the good has totally outweighed the bad. The one constant was definitely change. In our business this is neither good nor bad.

In getting ready for the WASFAA conference, someone was mentioning in an email that one of our popular speakers may not be able to attend. The emailer told us to, “Remember, stay flexible as this may change.” And this came from a long-time financial aid professional. What? Are you kidding me? Being the typical smarty-pants that I am, I responded back saying, “We wouldn’t be in this business if we weren’t flexible.”

I can remember waiting year after year for the most recent Reauthorization to occur. And then when it finally passed there were all sorts of changes. And as soon as it passed we were griping about the changes. One of our most recent long and dragged-out changes for which we’re now waiting for some closure is converting from the FFEL Loan program to the Direct Loan program. And this year I’ve been lucky enough to be the WASFAA president during the FFEL-vs-DL-to-Most-Likely-DL days.

Since I began my presidency last April 2009 WASFAA has been closely monitoring the ups and downs of the FFEL to DL conversion. I know that every day that I turn on my email my first glance is to see if anything has happened in Congress. With the packaging of the new award year in high gear some of us are still not sure what loan program we’ll be using for loans for next fall. It’s been like playing craps. We’re weighing the odds. The conservative gambler that I am, I’m currently in the process of converting over to DL and with that comes huge changes to our everyday processes. Change! You bet. Bring it on. We’ll be ready no matter what.

Another change in our profession during the past few years has been the number of vendors who have had to leave the business. As many of you now know, all of the state, regional and national financial aid conferences and trainings have had their numbers of attendees drop around 40%. This was a huge change that hit us all in the pocketbook. We have definitely had to change how we do business. For instance, during the past year WASFAA put together the Core Activities Task Force to evaluate the necessities of keeping our association afloat.

I am happy to report that we were able to reduce the number of committees for 2010-11 from 21 to 14. We’re still able to conduct business and to offer our premiere training events. We’re just doing them differently. In other training we totally were “thinking outside of the box.” In order for our schools to continue to receive training in a cost-effective manner, WASFAA purchased a web-based training and conferencing platform that will allow us to offer training webinars. By eliminating the travel and other related expenses, we’re giving schools the opportunity to receiving training in the comfort of their offices at an extremely reduced cost. Some of the networking opportunities are gone but somehow we’ll make this change work.

Next year we’ll have some other issues for which we’ll be waiting for some change. As Dr. Barry Simmons, the current NASFAA National Chair stated at several recent conferences, “We’re agents of change.” (See – I do listen to speeches!)

And personally the biggest change of all coming in April is that I will turn over the reins of the WASFAA presidency to the capable hands of Sandi Guidry. At this point, I would like to thank all of you who have made this year one of the most memorable and enjoyable years in my financial aid career. I have met so many wonderful people in the various states and regions that I visited and I think I made a few new friends. Thank you for letting me serve you this past year. It has truly been an honor.
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WASFAA Calendar

March 22-23, 2010 – PacFAA Conference

April 18-20, 2010 – Mark your calendars for the WASFAA Annual Conference at Coeur d’Alene, Idaho

June 6-11, 2010 – Mark your calendars for the WASFAA Sister Dale Brown Summer Institute at Arizona State University in Tempe, AZ

July 18-21, 2010 – Mark your calendars for the NASFAA National Conference at Denver, Colorado
Note from the Editor

Tracey Lehman
Director of Financial Aid, Oregon Institute of Technology
Newsletter Committee Chair

It has been a pleasure to be your Newsletter Chair for the past two years. As all good things do, it is time for my time as chair to come to an end. I have had the opportunity to work with a wonderful newsletter committee. The committee has been small but strong and I can’t thank them enough. It has also been a pleasure to serve on the Executive Council. I am continually amazed at this group of very dedicated and hard working professionals whose primary concern is to serve its members.

In this issue we have tried to keep informed about WASFAA activities and events, to communicate change and offer some information to ponder. Please make sure you take a look at the “What’s New for WASFAA” section. We have new officers, new committees and a streamlined budget; we are tightening our belts so to speak. As always, the Executive Council would like to hear from you, our constituents, about how we can serve you better.

I hope many of you have the opportunity to attend this year’s WASFAA conference. The theme is “Student Success” and we all play a part. After reading recent research by the Public Agenda (“With Their Whole Lives Ahead of Them”) prepared for the Bill and Melinda Gates Foundation, it appears to me that we can all do more to assist young adults in getting the information they need to attend college. According to the report, 33% of those surveyed felt their high school guidance counselors were poor in providing information on ways to pay for college and 48% reported that they felt they were just another face in the crowd. I encourage all of you to explore ways in which you can assist young adults in finding success as they explore their post-secondary goals.

WASFAA Editorial Staff

Renee Davis
Copy Editor

Judy Saling
Copy Editor

Colleen MacDonald
Fund Development
Newsletter Committee Liaison

Samuel Collie
Transition Editor

Advertising Rates

Newsletter Ad Dimensions and Cost:

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Preferred format is high quality PDF

Ads (PDF’s) should be emailed to Colleen MacDonald, Fund Development Chair, CMacdonald@edfund.org.
What’s New With WASFAA?

WASFAA Election Results 2010

2010-11 WASFAA election votes have been counted and the winners are: Kay Soltis, Pacific Lutheran University, President-Elect; Adam Hatch, Hawaii Pacific University, Vice-President; Luhui Whitebear, Confederated Tribes of Grand Ronde, Secretary; Peter Miller, Truckee Meadows Community College, Treasurer; and Jackie Alleyne-McCants, University of Alaska, Fairbanks, Ethnic Diversity Representative-at-Large.

Also, as part of the recent 2010-11 WASFAA election, a favorable vote was made to increase the annual WASFAA membership fee from $40-$50.

WASFAA Committees for 2010

President Mindy Bergeron appointed a task force to look at WASFAA’s core activities. The task force consisted of: Sandi Guidry, Catherine King-Todd, Steve Herndon, Peter Miller, Leonard Walker, Mindy Bergeron, Pat Peppin, and Patrick Downey. The task force looked at committee activities, relationship to core activities, value to association, and membership survey results. The task force recommended to the executive council the following committees for 2010.

1. Electronic Services and Historical Archives merged
2. Membership and Volunteer Development merged
3. Strategic Planning and Nominations merged
4. Summer Institute and Management Leadership Institute will be chaired by one person
5. Training
6. Fund Development
7. Fiscal Planning
8. Newsletter and Communications merged
9. Site Selection
10. Ethnic Diversity Action Committee
11. Conference
12. Bylaws and Policies & Procedures chaired by President-Elect
13. Federal Relations and Graduate Professional Issues merged
14. Executive Committee

The previous 24 committees were reduced to 16. Two are on hold for now and four were combined with other committees.

Treasurer’s Report

WASFAA maintains two year’s operating expenses plus the liabilities of outstanding contractual obligations in reserves.

WASFAA has seen a sharp decline in our revenue streams in the past two years. This decline relates directly to the downturn in the economy in general, reduced interest income, reduction in the number of vendors and vendor sponsorship, reduced number of attendees at WASFAA events due to travel restrictions and budget reductions at institutions around the region.

In light of this, the Executive Council in conjunction with Fiscal Planning has reduced the operating budget significantly.

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2010-2011 Elected Officers and Committee Chairs

Sandi Guidry, President
Mindy Bergeron, Past President, Nominations and Elections, Strategic Planning
Kay Soltis, President-Elect, Polices and Procedures, By-Laws
Adam Hatch, Vice President
Luhui Whitebear, Secretary
Peter Miller, Treasurer
Jackie Alleyne-McCants, Segmental Rep-at-Large, Ethnic Diversity
Barbara Bickett, Segmental Rep-at-Large, Proprietary
Ted Malone, Alaska President
Craig Fennell, Arizona President
Yvonne Gutierrez-Sandoval, California President
John Bender, Idaho President
Neil Woof, Nevada President
Patti Brady-Glassman, Oregon President
Jeff Scofield, Pacific Islands President
Rebecca Wonderly, Washington President
Frank Green, Conference
Catherine King-Todd, Sister Dale Brown Summer Institute
Susan Shogren, Training
Steve Herndon, Fiscal Planning
Tami Sato, Scholarships and Awards
Judy Saling, Newsletter and Communication
Renee Davis, Electronic Services and Historical Archives
Kevin Jensen, Federal Relations
Leonard Walker, Site Selection
Tracey Lehman, Membership and Volunteer Development
Wendy Olson, Jerry R. Sims Management Leadership Institute
Colleen MacDonald, Fund Development
Marianna Deeken, Federal Liaison

TRANSITIONS . . .

Kim Schreck has left EDFund and is now with ED. Kim works in FSA with the Application Processing Division, and is working on the web products and EDExpress. Her contact information is kimberly.schreck@ed.gov, and phone is 206.615.3688. She’s currently working from the Seattle Regional Office, but will be relocating to Washington DC sometime in the future.

Holli Johnson has accepted the position of Financial Aid counselor at the University of Oregon. Holli was recently employed at UO as a Financial Aid Information Specialist. She brings a wealth of financial aid experience from previous stints at Portland Community College, Central Arizona College, and Grossmont College.

Ben Fisher has joined the University of Oregon as an Assistant Director of Student Financial Aid and Scholarships. Ben returns to the University of Oregon after a four year hiatus at which time he worked for Oregon State University as a Financial Aid Advisor and Program Coordinator.

After ten years as the Director of Financial Aid at Warner Pacific, Cindy Pollard is pursuing her passion for education by adjunct instructing. Her separation from the college is April 2, but she will continue to serve on the WASFAA training committee until at least the end of April, which is the end of her term.

Bryan Cook has been named the Interim Director of Student Financial Services and Financial Aid at Warner Pacific. Congratulations!
HEOA–Making that “Good Faith Effort”

Tami Soto
Director of Financial Aid, Southern California College of Optometry
Graduate/Professional Chair

This is the title of one of the binders in my overhead cabinets. The Higher Education Opportunity Act of 2008 (HEOA) included a ton of new disclosure and reporting requirements. Most required us to put in a “good faith effort” starting August 14, 2008 but some of us were waiting for the final regulations to come out which they finally did in October 2009. So maybe you are like me and just getting started in earnest on this enormous task of fulfilling the many new HEOA disclosure and reporting requirements. We still have some time since the regulations effective date is July 1, 2010.

There are some good resources out there to help you. The National Postsecondary Education Cooperative (NPEC) has provided a monograph that includes a summary of the HEA institutional disclosure requirements. Go to http://nces.ed.gov/npec and click under the November 2009 Highlights. I used their summary as my basic document to review and check requirements that I know we had covered, crossed off ones that don’t apply (i.e. SCCO has no athletic programs) and noted if there was someone else on campus I had to contact. NACUBO and USA Funds also have great summary charts.

One of the first things you’ll want to do is check out your own college’s website, college catalog, student handbook, employee handbook and financial aid booklet. You might be surprised how much is there and already in place. You can try to figure out where some of these “required to be prominent and conspicuous” information would be best located. Some schools have all their HEOA requirement information located in one area of their website.

When you start getting down to the nitty-gritty of actually trying to write a policy, it’s time to start surfing the web. Check out the websites of other colleges or ask your colleagues. Why start from scratch when you can just put together what you like from two or three schools and substitute your college’s name in the right places? In many cases the other school’s legal counsel has already cleared the wording so that is even better. I used this method to develop our code of conduct policy for financial aid employees.

Surfing to find out more information on copyright infringement policies and peer-to-peer file sharing turned out to be a huge issue. Do you remember the court case where a poor soul downloaded 30 songs to “just sample” them and got hit with a $22,500 penalty ($750/song)? That’s pretty scary. I found a great resource for information at www.educause.edu/Resources/Browse/HEOA/34600 and used this plus other college websites like Reed College and Harvard, to draft a policy for my college. For this HEOA requirement you may need to involve your IT person and librarian.

Do you remember how with each HEA reauthorization we would try to get rid of the non-financial aid activities such as selective service, voter registration and U.S. Constitution education? What happened? Now we have added fire safety, emergency plans and alerts, missing persons, vaccinations and textbook cost containment. I shudder to think what could be next.

Ethnic Diversity Action Committee News

Karla Gonzalez
Mesa Community College
WASFAA EDAC Chair

Ethnic Diversity Action Committee is excited to offer two interest sessions at the Annual WASFAA Conference in Coeur d’Alene, Idaho to be held April 18–20. We invite you to attend and meet Dr. Chemene Crawford, Dean of Student Affairs from the College of Southern Nevada. She will share her expertise and knowledge regarding diversity related matters. She will offer valuable information, provide an opportunity for discussion, and help increase awareness about the benefits of diversity in the workplace as we are in the business of serving students. The second session will provide participants with an opportunity to explore and discuss our diverse student populations, and how it is often difficult to maintain civility on our college campuses - among faculty, staff, and students alike.
Reinventing Seminary Education in Seattle

Johanna Dwyer
Mars Hill Graduate School
Member Graduate and Professional Issues Committee

This is the beginning of my 5th year with Mars Hill Graduate School (MHGS). We are located in downtown Seattle along Elliott Bay on a beautiful campus we moved to in 2006. At MHGS we have students studying Counseling Psychology, Christian Studies and Divinity. Our community is very unique since more than 50% of our enrolled students hail from outside of our home state of Washington.

MHGS currently serves just fewer than 300 students, the majority of which need to use financial aid to help cover their costs of tuition and living expenses. As a graduate school we offer Stafford loans, Graduate Plus loans, federal work study and some institution scholarships. We also have students who receive funding from programs such a VA, employment reimbursement, and sponsorship from other organizations.

MHGS is a fairly young institution, being only 13 years old, but we think this is one of the areas that make us so great. We are still fresh and excited, still ready to charge forward and meet the challenges of today and tomorrow. Being new has afforded us opportunities for growth such as adding the FWS program to our campus in 2007. This has been a great addition for our students since previously we were only able to offer a few on-campus positions and have now tripled that number.

Our students come from many different walks of life and come to us with many different talents. They are passionate and purposeful—committed to both academic excellence and relational maturity. They are curious about the biblical text, the human soul, and the culture at large—convinced that the Gospel truly can change the world. Many of our graduates may go on to practice private therapy while others may turn towards service based work.

Our current COA is approx. $28,000 per year and depending on the student’s program of study they spend anywhere from 2 to 4 years with us. I am looking forward to seeing how the new loan forgiveness program can work to their benefit because our graduates do not always go into the highest paying careers but instead many of them chose service based careers in fields that allow them to continue to give to others.
Go to a financial aid conference? Here’s how to get the most out of your experience

Craig Berkley
Account Executive Team Manager, TG

Conference season is in full swing. Whether you’re attending a local event or a state or regional association conference, you may be wondering what you can do to gain the most value from your experience. Here are some tips to consider in preparing for, attending, and then following up on a conference. This general guide should help ensure long-term rewards for yourself and even benefit those with whom you share your new knowledge and information.

Set your objectives ahead
Create a brief list of things you want to learn at the event. Include people you want to meet, organizations you want to learn more about, or processes or policies about which you need guidance. If a particular event does not cover a topic of interest, ask around. Association conferences offer a rare opportunity to have one-on-one contact with a wide variety of industry experts.

Tell coworkers where you’re going and why
Share with all of your office mates, even those in related function areas, that you will be attending the event. They may have specific requests for information or provide you with the names of contacts who could be helpful. If possible, share a brief agenda of the topics to be covered, in case someone needs information slated to be covered at the conference.

Make appointments to meet colleagues and contacts
Chances are that the people you most need to talk to will have time to meet with you, but ask early. If a person’s time is in high demand, consider scheduling a “group” lunch with colleagues who may have other topics to discuss. This way, your contact may be more willing to join you, meet your colleagues, and focus on your topics or needs.

Prepare a conference survival kit
Buy or obtain a sturdy, multi-pocket organizer folder. To assemble your kit, include your itineraries, event mailings, maps, travel confirmations, a supply of business cards, and other items that you will need for your trip. Keep this folder handy on your desk before the event, and drop in notes as you think about your tasks and to-do items.

Review your materials and plot your strategy
After you register, spend 15 to 30 minutes reviewing conference materials to plan your agenda. Highlight those sessions you will attend. If there are two events that conflict, label one “A” for attend, and the other “H” for handouts. This will remind you to ask for copies of the materials provided at the session you will not attend.

Be a selective note-taker and ask the right questions
Avoid taking down notes on everything discussed — you may miss important points. Instead, listen closely. Take down quick notes only on those items that need clarification. Also, ask questions. If you need clarification, others may need it as well. At the very least, presenters can use the opportunity to reinforce their points.

Maximize your contacts
Foster relationships. Prepare a quick two- or three-sentence introduction, and use it when an opportunity arises to greet new acquaintances. If you want to exchange information at a later date, offer your business card and commit to a quick e-mail or phone call after the event.

Sort your materials and notes for distribution
Every piece of information you collect will probably benefit someone in your office. As you receive materials, note colleague names who may benefit from the information on a corner of the document, and store materials in your survival kit. When you return, you can quickly route materials.

Preserve what you learn
Identify three to five of the most important ideas or concepts you learned at the conference. Summarize them in an e-mail or one- or two-page “idea log.” Explain how these ideas could be implemented in your office and share it with your supervisor. If appropriate, distribute this document to your other colleagues — it may start discussions for future improvements in your office.
**Write thank you notes and follow-ups**
A quick e-mail message or note to a new acquaintance can go a long way toward building a permanent working relationship. Share a thought or idea you discussed, or offer additional information on you, your office, or your products and services. Offer your assistance in the future—everyone appreciates a helping hand.

**Share what you learned with others**
Spend 10 to 15 minutes visiting with colleagues, detailing your experiences, and distributing copies of useful information. Ask your supervisor for a few minutes during the next staff meeting to share what you learned. If you participated in any fact-finding activities for a colleague, now is the time to share this information as well.

**Stay on top of housekeeping**
Complete your expense reports and other documents as soon as possible. The longer you wait, the more difficult it becomes to fill out travel reimbursement forms and reports. Prepare these items when your activities are fresh on your mind. If you find you have limited time, spend at least five minutes sorting out receipts and sketching out basic costs and descriptions. These will jog your mind when you return to the task.

**Enjoy the conference**
There are other rewards beyond the obvious for an enjoyable conference experience. You’re more likely to remember information and follow up on colleague contacts if you’ve liked and enjoyed the event. You’re more likely to put to use what you’ve learned. Also, in the end, if you found you spent your time profitably at a financial aid conference, you’re more likely to feel more committed, interested, and ultimately happier about working in the industry. This, of course, has long-term benefits for you and for those who work with you.

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**2010 NASFAA NATIONAL CONFERENCE**

**DENVER, COLORADO  ▶ JULY 18-21, 2010**

**Don’t be on the outside looking in!**

**Three great reasons to be an insider this year:**

1. The NASFAA Conference offers the best of both worlds: sessions led by your own colleagues, as well as by Department of Education staff.

2. The opportunity to learn and network with your peers from across the country.

3. Something for every interest. Check out the online scheduler, which includes about half of the final sessions. More sessions are being added so check back often. You can also view a separate list of potential Department of Education sessions.

Go to [http://www.nasfaa.org/Subhomes/AnnualConference2010/index.html](http://www.nasfaa.org/Subhomes/AnnualConference2010/index.html) for more information and to register for the conference.
The Federal Relations Committee was very active this last quarter in its advocacy efforts toward the Student Aid and Fiscal Responsibility Act legislation that passed through the House and is awaiting action through the Senate. We spent many hours collaborating on the issues and forwarding our concerns to our legislative representatives.

The Department of Education has just completed another round of negotiated rulemaking regarding general and non-loan programmatic issues. Of the 14 issues on the agenda, the committee reached agreement on nine and failed to reach consensus over the remaining five issues. Here’s the tally:

**Agreement reached (but not binding) on:**
- Definition of a high school diploma
- Definition of a credit hour
- Written agreements between institutions
- Treatment of repeated coursework
- Satisfactory academic progress
- Ability to benefit
- Verification
- Timing of disbursement
- Misrepresentation

**Consensus failed over the following issues:**
- Incentive compensation
- State authorization
- Definition of gainful employment
- Return of funds – Taking attendance
- Return of funds – modules/compressed sessions/minisessions

The next step will be the Department’s issuance of a Notice of Proposed Rulemaking (NPRM) where the public is allowed to submit comments before issuing their final rules. Take a close look at it when it’s published and make sure that the Department receives your and your campus’s perspective regarding the outcome of their proposals.

Volunteering as a member of the Federal Relations Committee is a rewarding and enabling experience. It provides great legislative skill building by giving you the ability to get together with colleagues from all aspects of student aid delivery. It also allows you to get your concerns to the legislative table effectively and with significant backing. I myself have the pleasure of also being on NASFAA’s Federal Issues Committee this year, which has allowed me to deliver a double punch on issues that affect us regionally and nationally. Don’t delay! Volunteer today!
Spring Cleaning

Brenda Vaughn and Cheryl Kibarian
AFC
National Student Loan Program

Early February (or when I finally get around to prepping my tax paperwork) is the time when I shred all my old documents that I have been keeping. Before online bill pay, my file cabinet was filled with copies of bills which indicated when I paid the bill, the check number, and date the check was sent. Online bill pay has eliminated much of that, however, it can be difficult to determine what to keep and what to throw out. Separate your documents into three groups, keep forever, long term, and short term.

Items you keep forever:
- Birth and death certificates
- Passports
- Social security card
- Marriage licenses
- Adoption papers
- Military records and citizenship papers
- Your will

Long-term files – store these files for at least seven years
- State and Federal Income tax returns
- Wage/salary records and annual payroll
- Savings account records
- Monthly statements from the bank, brokers, mutual funds, 401(k) and other retirement plans
- Automobile, truck, and farm machinery titles

Short term storage – store these files from six months to three years
- Utility and telephone bills
- ATM receipts/deposit slips
- Papers confirming the sale or purchase of stocks or bonds
- Pay stubs

The Utah State University Extension has a publication that provides a detailed list of what documents to keep and what you can trash. Remember when you are spring cleaning this year, shred any unneeded documents with a cross cut shredder to protect yourself against identity theft.
WASFAA Spring Training 2010: R U Ready?

Cindy Pollard and Sue Shogren
WASFAA Training Committee Co-chairs

Financial aid professionals manage information every bit as much as they manage money. Even while we administer complex programs, monitor the legislative landscape and ensure the delivery of essential funding, we’re also constantly striving to improve effectiveness, find efficiencies and demonstrate excellence in service to our customers. Training is a vital and constant need, especially when it includes opportunities to share with and learn from our colleagues in the financial aid industry.

To help meet your training needs, the WASFAA Training Committee is developing a series of training webinars entitled “Communicating with Your Students.” Comprised of three topics, this series will explore implementation of FERPA, consumer information and disclosure requirements, and changes in the Truth in Lending Act and the Credit CARD Act. We also will explore together the potential for using social networking and multi-media to inform and connect with your students.

You will be able to register for one, two or all three topics in the series. Learn from experts in their fields, hear how your colleagues are addressing these issues, and share your experience in an open forum during each session.

We expect to offer the Spring Training series during April. More information and the opening of registration will be announced via the WASFAA listserv. In the meantime, be sure to renew your WASFAA membership so you receive important news and updates throughout the year. And if you don’t already have one, consider obtaining a USB headset with a microphone so you can take full advantage of this—and other—online events.

We’re working to support you. Feel free to contact us with any questions or suggestions.

Cindy Pollard, Co-chair (cpollard@warnerpacific.edu)    Sue Shogren, Co-chair (susan.shogren@nelaservices.net)

From ISIR and EFC to FAFSA and the SAT, we support your efforts from A to Z.

TG helps you promote student awareness and access by providing useful resources and support materials, including:

- Informative programs and publications for first-generation and nontraditional students
- Financial literacy tools and training for families and students
- Specialized call centers with information on planning and financing a higher education

Take an in-depth look at TG’s student access and awareness resources at www.tgslc.org/WASFAA.

Making a difference for families and students

TG  The Guarantor of Choice®
Catherine King-Todd
Director of Financial Aid
Thunderbird School of Global Management

Sandi Guidry had the honor of being awarded the WASFAA Distinguished Service Award in 2009 at the conference in Anchorage. She was unable to be there in person—her reaction to receiving the award? “I wish I had been there. It was a wow moment”!

Sandi started her involvement with WASFAA in 1989 when she was the state president of the Nevada Association. Following the 1989-90 year, she volunteered and was a member on Awards, Conference & Newsletter committees. For 2001-02, she co-chaired the Summer Institute and handled all the on site arrangements and since then she has co-chaired our Annual Conference in Reno in 2005-06, co-chaired our Jerry R. Sims Management & Leadership Institute, has been our Vice President, chaired our Historical Archives Committee and this year is our President-Elect.

When asked her interest in participation with WASFAA, Sandi did not hesitate to with her answers. She indicated this is a great way to network with your colleagues; there is a wonderful camaraderie; and she wished to give back and pave the way for others.

She remembered I suggested she get more involved in 2002. Sandi initially said no but it only took a couple of years before we were able to consider her among our list of volunteers. The rest is, as it is stated, history!

Sandi has this to say to others about getting involved. “You might be hesitant to volunteer, intimidated or need to step outside your comfort zone; people are welcoming, nice and sincerely wish to bring others in.”

Ms. Guidry began her financial aid career in 1979 as a work-study student (sound familiar?) at the University of Nevada, Reno. She was hired as a full-time employee in 1981 and worked her way up to her current position as Director of Financial Aid.

WASFAA is fortunate to have individuals such as Sandi who are willing to devote their time and energy to the Association. We look forward to her service as our President during the 2010-11 year.

Meet One of Our 2009 Award Recipients

RENUE YOUR
WASFAA MEMBERSHIP TODAY!

WASFAA Members Benefit From…

- Staying current on financial aid issues.
- Receiving information on advocacy for financial aid at the regional and federal levels.
- Attending valuable training opportunities.
- Networking with colleagues from diverse backgrounds and experiences.
- Attending the annual conference.
- Gaining a regional perspective in administering financial aid.
- Developing new skills, including leadership skills, through volunteering for WASFAA.
- Accessing scholarship opportunities for WASFAA training and conference events.
- Accessing funded research opportunities.
- Accessing the WASFAA directory.
- Receiving the WASFAA newsletter.
- Receiving listserv notices and alerts.
- Accessing employment listings.

The Western Association of Student Financial Aid Administrators (WASFAA) encourages you to become a member. If you would like to join, visit WASFAA’s website at www.wasfaa.org and click on “Member Services” to access the membership application.

For more information visit our website at WWW.WASFAA.ORG.
Pat Peppin
Director of Financial Aid, Mesa Community College
Strategic Planning Chair

The Strategic Planning Committee has been working very hard to make sure WASFAA is meeting the goals of the association. Our main concern is the continuing external funding that supports our association. We want to explore other means of resources to keep the association financially stable.

Our current Strategic Plan will expire in 2010. The next Strategic Plan will be a 3-year plan. The Strategic Plan consists of 8 goals. The committee has prioritized the goals and they are as follows:

Goal #1: Be a leader in providing training and professional development opportunities that are responsive to member’s needs

Goal #2: Maintain the long-term financial stability of the Association

Goal #3: Assess and monitor the performance of the Association and implement strategic adjustments

Goal #4: Continually improve methods and processes for communicating with the membership

Goal #5: Increase the participation of members in Association activities.

Goal #6: Consolidate and communicate the public policy positions of financial aid administrators in the Western Region and provide members with the support and education they need to further their own advocacy efforts.

Goal #7: Collaborate and coordinate with other organizations and associations in order to serve our members more efficiently and effectively.

Goal #8: Maintain and enhance the diversity of our membership and the Executive Council. The Strategic Planning Committee will keep you updated with the progress of monitoring its goals.

Within WASFAA’s Strategic Plan a tracking tool has been developed. The purpose of the tracking tool is to ensure that we are on the right path to fulfilling our goals as established in the Strategic Plan. The Strategic Planning Committee is responsible for guaranteeing that the Strategic Plan is actually meeting the goals as set forth. Below is a sample of the tracking tool showing on an annual basis the increase in membership based on each WASFAA sponsored training event. If you would like to review details of the Strategic Plan, you may view it on the WASFAA website at http://www.wasfaa.org/docs/toc_about.html under Governing Documents. Pat Peppin may be contacted if you wish to see the complete tracking tool.

<table>
<thead>
<tr>
<th>Increase in number of members participating in Association activities or events/% of membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/05</td>
</tr>
<tr>
<td>Fall NASFAA Training</td>
</tr>
<tr>
<td>Spring Tax Training</td>
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<tr>
<td>Spring Training</td>
</tr>
<tr>
<td>PacFAA Tax Training</td>
</tr>
<tr>
<td>Pre-Conference Event</td>
</tr>
<tr>
<td>JRSMLI</td>
</tr>
<tr>
<td>SDBSI</td>
</tr>
<tr>
<td>Newcomer’s Reception</td>
</tr>
<tr>
<td>Annual Conference</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>
2010 Sister Dale Brown Summer Institute

Jack Edwards
Stanford Graduate School of Business

In the continuation of tradition, WASFAA will be conducting one of the premier training events in the country at Arizona State University in Tempe, Arizona, June 6–11, 2010. The Sister Dale Brown Summer Institute (SDBSI) is a 6-day intensive residential training program designed to teach the fundamentals of the Federal Student Aid Programs and provide participants with an understanding of regulations and provisions by which they are governed. The curriculum is structured towards providing “new” aid administrators (those with two years or less of processing experience) with experiential training while also providing an opportunity for experienced aid administrators to receive refresher training on the financial aid delivery process.

Training Format
At the SDBSI, training is conducted in interactive lecture-style presentations designed to introduce topics and provide subject matter experience. Additionally, participants take part in faculty-lead small group discussion sections to reinforce the daily training topics through examples, exercises and dialogue amongst the group members. The week’s training activities culminate as each group collaborates on a case study taking a hypothetical family through the financial aid application and delivery process, reinforcing the instructional material and drawing upon knowledge gained by the participants.

Summer Institute Faculty
Eight experienced WASFAA members make up the 2010 SDBSI faculty, including a US Department of Education representative. Public, private, and proprietary colleges and universities are represented institutions. Several members have even received formal training as a previous summer institute participant. The diverse faculty helps ensure participants are exposed to a broad variety of financial aid philosophies, processing structures, and policies & procedures.

Networking Opportunities
The SDBSI is more than a week-long training event. It also provides ample opportunity for participants to interact with colleagues and establish or expand professional networks. Additionally, during the week there are social activities to help participants relax after a long day of intensive training.

For the latest information on the 2010 SDBSI, including updated registration information, the tentative agenda for the week, and travel suggestions and tips, visit the WASFAA website at www.wasfaa.org. I hope you or a staff member are able to join us this summer in Tempe at ASU. Should you have any questions, please feel free to contact Jack Edwards at Edwards_jack@gsb.stanford.edu or Andy Promsiri at promsiri@anderson.ucla.edu.

SCHEDULED TRAINING TOPICS
• Overview of Aid Programs
• Reauthorization Update
• FAFSA Application Process
• Professional Judgment
• Student Eligibility
• Calculating Pell Grant Awards
• Federal Methodology
• Processing Student Loans
• Cost of Attendance
• Return of Title IV Aid
• Verification
• History of Financial Aid
• Packaging & Awarding
Communicating Change: Eastern Oregon University’s Multi-Stage Communication Plan For Transition to Direct Lending Conversion

Sam Collie
Interim Financial Aid Director
Eastern Oregon University

Laura Hancock
Marketing, Development & Public Affairs
Eastern Oregon University

Like other schools in Oregon and across the U.S., Eastern Oregon University (EOU) is transitioning from the Federal Family Educational Loan Program (FFELP) to the U.S. Department of Education’s Direct Loan Program. Title IV law and regulation changes bring about large and small adjustments to office policies and procedures and aid delivery. EOU has a constant duty to communicate these changes to its constituents.

Financial Aid administrators at EOU reviewed the scope of the change and decided that the transition to the Direct Loan (DL) program merited a thoughtful communication plan that targeted a large group of diverse constituents and stakeholders. As the university approached the change from FFELP loan delivery to DL delivery, a communication plan was developed that included students, parents, campus administrators and community partners.

Defining Three Major Stages

EOU did not want to begin communicating about the change too soon so as not to overwhelm students and families who were thinking about their 2010-11 FAFSA with too much information. A start date was set for Stage One of the plan to begin the end of January 2010.

Stage One communication centered on students and parents. EOU has been a long-time FFELP school and financial aid administrators believed it was especially important for continuing student and parent borrowers to get information about a new loan delivery system.

Other critical groups to reach are EOU stakeholders, regional partners and university leadership. EOU is located in a small community in northeast Oregon and the university president is a prominent member of that community. Any major change in a financial aid program would result in questions from other community leaders and local media. Stage Two of the communication plan covered the main EOU campus, regional centers, community college partners, EOU president and cabinet members, and media including the campus radio station and student newspaper. Financial Aid worked closely with the Public Affairs Office to rollout this phase of the communication plan.

Finally, Stage Three was viewed as an opportunity to develop a default prevention plan. As EOU moves away from FFELP and into DL, the future role of guarantee agencies is uncertain. Many FFELP schools have relied on the default prevention services of guarantee agencies for publications and exit interview sessions. Seeking help with developing the best way to communicate this significant policy change to a diverse group of stakeholders, Financial Aid involved the vice president of Marketing, Development and Public Affairs to help develop a strategy and refine the communication plan.

Once the basics of “who” to communicate with and “what” to communicate (the conversion from FFELP to DL) were determined, the Public Affairs Office helped to bring the plan into focus by determining the “how” and the “when.” Financial Aid wanted to communicate the loan delivery system change over several different media streams; they just were not sure how to focus those communications and when to begin.

Financial Aid decided it was imperative to communicate the change from FFELP to DL on the office’s main departmental web page. Three communication pieces were developed: an overview, a question and answer piece and a loan repayment piece. These materials were used to generate a press release which was also repurposed for the website. Direct links to all materials except the loan repayment information were placed on the Financial Aid homepage for easy access. The loan repayment piece would be used later on in the communication process to help avoid unnecessary confusion.

The next task was to decide specifically how to communicate to borrowers as part of the normal financial aid processing flow. As students receive award notifications and accept loans, the Financial Aid Office sends out a
EOU is currently implementing Stage One of the plan with the addition of talking points for campus executives. Targeted communication for admissions counselors, academic advisers and directors of the 16 regional centers EOU operates across the state is also important during this phase, as well as alerting community college partners of the transition.

As spring term approaches, EOU will make sure its graduating students have excellent information about loan repayment options, deferments for graduate schools and loan consolidation options. In addition, communication with EOU’s continuing students must reiterate the need to sign new Direct Loan MPNs.

By developing a basic plan that included the “who,” “what,” “where,” “when” factors and by asking for the help of communications experts in Public Affairs, Financial Aid set up a planned course of action. Examining the scope of the regulatory change and understanding how it affects all of EOU’s stakeholders, the university was able to collaborate to put its plan into action.

EOU’s Direct Loan Transition Communication Plan.

Stage One – Continuing and New Student/Parent borrowers
- Inform continuing and new borrowers that they will need to complete a Master Promissory Note (MPN) with the direct loan program for 2010-11.
- Give continuing and new borrowers the link to the direct loan electronic MPN site.
- Inform new borrowers that they will have to do an entrance interview on the direct loan site before funds will be disbursed.
- Continuing FFELP borrowers do not need to do a DL entrance interview. Inform continuing borrowers that they will not need to do a DL entrance interview; provide them information about the DL entrance interview and encourage them to do DL entrance interviews.
- Inform all borrowers about general FAFSA/Direct Loan/Disbursement flow.

Stage Two – Campus Community and Partners
- Inform campus stakeholders (target admissions counselors, academic and faculty advisors, regional or satellite campus advisors, and business office staff) about the change to direct lending.
- Inform partners (consortium partner schools, schools in our region), about the change to direct lending.
- Draft talking points for campus leaders (presidents, campus executives, etc) who may get questions about the reasons for your campus decision to participate in direct lending.

Stage Three – Default Prevention/Exit Interviews
- Inform continuing/graduating borrowers that their loans may have multiple loan servicers.
- Provide students with information about their total educational loan debt (NSLDS).
- Provide information about Federal Direct Loan Consolidation.
- Inform students about Grace, Periods, Forbearance, Payment Plans, Default definitions.
- Provide information on options for students going to graduate or professional schools.
Thinking about financial aid job change and creating your job-search strategy? Job-hunting can be hard work, but knowing where to start can help you create a plan. Knowing where to find jobs needs to be a top priority of your plan.

Networking

Job search networking can seem intimidating, but it doesn’t have to be. Remember you have contacts - colleagues from professional associations, friends, family, neighbors, college alumni, - anyone who might help generate information and job leads. Depending on your comfort level, you can take a direct approach to ask for job leads or just ask for information or advice. This can be done over the phone, by email, or in person. Remember if someone refers you to someone, follow through.

Be aware that employers often look to their network to find candidates. Barbara Bickett, Group Director of Student Finance from DeVry University, Inc. recently commented, “Based on my financial aid association involvement, I have been able to find a pool of candidates for a variety of open positions in my organizations over the years.” Consider going to an association workshops, public executive council meeting or conferences. Also, volunteer your time for professional associations. Many organizations request volunteers to work at the registration table where you can greet people as they come in.

Websites

There are plenty of websites to go look for job postings. Here are a few that specialize in the financial aid administrators and higher education postings:

**WASFAA JobsLink**
www.wasfaa.org/docs/toc_employment.html
Western Association of Student Financial Aid Administrators (WASFAA) is a professional organization of dedicated individuals in the eight state regions occupying the western United States including Alaska, Arizona, California, Hawaii and the Pacific Islands, Idaho, Nevada, Oregon, and Washington.

**NASFAA Career Center**
National of Student Financial Aid Administrators (NASFAA) is a national professional organization has a website that allows individuals to search postings, post resumes, and browse other career resources.

**Higher Ed Jobs**
www.higheredjobs.com/
HigherEdJobs.com is the leading source for jobs and career information in academia. During 2008, more than 2,960 colleges and universities posted over 55,290 faculty, administrative and executive job postings to the company’s web site.

**Chronicle of Higher Education**
http://chronicle.com/section/Jobs/61/
Weekly news and job-information source for college and university faculty members, administrators, and students.
It is the goal of the WASFAA Executive Council to hold an annual conference in each of the states comprising the WASFAA region at least every ten years, depending upon appropriate conference site availability and anticipated attendance and fiscal prudency. This is not always an easy task. It requires the acquisition of at least three different proposals, where possible, from hotels in the same city where the conference is being planned. Conference contracts are often complicated and, in addition to room rates, involve the review of such things as Banquet Event Orders (BEO’s), room blocks, cutoff dates, concessions, walk policy, attrition clauses, food and beverage (F&B), indemnification, force majeure, arbitration, claims and disputes, jurisdiction, etc. These contracts have to be reviewed, interpreted, and translated into recommendations for Executive Council consideration and vote. While room rates are always an important factor, the other items mentioned above become critical in the decision-making process as well.

We are pleased to report to the membership that the WASFAA Executive Council was successful in meeting its goal of holding an annual conference in each of its affiliated states during the last decade. Executive Council has striven to keep the annual conference sites conveniently located and room rates as low as possible for the membership. The following chart lists the locations and room rates of past and future conferences for the last decade:

<table>
<thead>
<tr>
<th>Year</th>
<th>Site</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>Hilton, Anchorage, AK</td>
<td>$110</td>
</tr>
<tr>
<td>2001</td>
<td>Doubletree, San Jose, CA</td>
<td>$103</td>
</tr>
<tr>
<td>2002</td>
<td>The Grove Hotel, Boise, ID</td>
<td>$ 99</td>
</tr>
<tr>
<td>2003</td>
<td>Hilton Hawaiian Village, Honolulu, HI</td>
<td>$167</td>
</tr>
<tr>
<td>2004</td>
<td>Doubletree Paradise Valley, Scottsdale, AZ</td>
<td>$129</td>
</tr>
<tr>
<td>2005</td>
<td>Doubletree Lloyds Center, Portland, OR</td>
<td>$112</td>
</tr>
<tr>
<td>2006</td>
<td>The Nugget, Reno/Sparks, NV</td>
<td>$ 99</td>
</tr>
<tr>
<td>2007</td>
<td>Hyatt, Anaheim/Disneyland, CA</td>
<td>$129</td>
</tr>
<tr>
<td>2008</td>
<td>The Westin, Seattle, WA</td>
<td>$175</td>
</tr>
<tr>
<td>2009</td>
<td>The Hilton, Anchorage, AK</td>
<td>$145</td>
</tr>
<tr>
<td>2010</td>
<td>The Couer d’Alene, Couer d’Alene, ID</td>
<td>$119, $113, $159</td>
</tr>
<tr>
<td>2011</td>
<td>Hilton Hawaiian Village, Honolulu, HI</td>
<td>$169</td>
</tr>
</tbody>
</table>

In the twelve years since 2000, WASFAA has held or plans to hold 2 conferences in Alaska, 1 in Arizona, 2 in California, 2 in Hawaii, 2 in Idaho, 1 in Nevada, 1 in Oregon, and 1 in Washington.
In the Summer 2009 issue of the WASFAA Newsletter, our President, Mindy Bergeron, penned an article titled “Income Streams – The Drought Years”. This is intended to be a continuation of that article.

In her article, Mindy shared with the WASFAA membership the hard reality that based on her travels throughout the country to attend various meetings and conferences as our WASFAA emissary, her observation was that states and colleges across the nation are cutting budgets and freezing travel to out-of-state events dramatically in response to the current state of the economy. As a result, attendance at many regional and state training events and conferences has dropped dramatically. This is true for WASFAA and the eight states comprising our region as well.

Attendance at WASFAA’s annual conference last year in May of 2009 in Anchorage, Alaska was down by almost 50% from previous years. The conference had only 202 attendees. Executive Council had hoped for a rebound for the annual conference this year in Coeur d’Alene, Idaho on April 18 – 19, 2010, and had initially projected an attendance of 325. At the recent Executive Council meeting in Portland, Oregon, however, based on current membership and early registration figures, the budgeted attendance expectation was reduced to 225. WASFAA membership is down over 50% from just 3 years ago, with 539 current members compared to 1,127 at this time for the 2007 – 08 membership year.

Membership dues and attendance at the annual conference are both critical potential income streams for WASFAA. The Association currently has some eight potential income streams including the annual conference, membership dues, fund development, interest income, JobLinks, the Jerry R. Sims Management & Leadership Institute (not held during FY 2009), the Sister Dale Brown Summer Institute, and Training. Because Training is such an integral component of the organization’s mission and vision statements as well as the Strategic Plan, there has been the need to subsidize training activities for budget purposes for the last several years. The following chart provides an end-of-year review of the WASFAA fiscal year 2009 potential income streams:

<table>
<thead>
<tr>
<th>Potential Income Stream</th>
<th>Actual Income</th>
<th>Budgeted Income or Actual Expense</th>
<th>Net Income or Subsidy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Conference 2009</td>
<td>$61,480.58</td>
<td>$52,804.87</td>
<td>$8,675.71</td>
</tr>
<tr>
<td>2) Dues</td>
<td>$19,473.55</td>
<td>$40,000.00</td>
<td>($20,526.45)</td>
</tr>
<tr>
<td>3) Fund Develop</td>
<td>$52,402.41</td>
<td>$50,000.00</td>
<td>$2,402.41</td>
</tr>
<tr>
<td>4) Interest Income</td>
<td>$4,255.97</td>
<td>$10,000.00</td>
<td>($5,744.03)</td>
</tr>
<tr>
<td>5) JobLinks</td>
<td>$4,063.50</td>
<td>$6,000.00</td>
<td>($1,936.50)</td>
</tr>
<tr>
<td>6) SI</td>
<td>$48,908.95</td>
<td>$37,007.39</td>
<td>$11,901.56</td>
</tr>
<tr>
<td>7) Training</td>
<td>$1,323.92</td>
<td>$25,995.72</td>
<td>($24,671.80)</td>
</tr>
<tr>
<td>Total</td>
<td>$192,060.68</td>
<td>$221,807.98</td>
<td>($29,747.30)</td>
</tr>
</tbody>
</table>

This chart shows that in spite of current economic conditions, Conference 2009, Fund Development, and the Sister Dale Brown Summer Institute all provided modest, but positive income streams for the
The remaining potential income streams did not. Membership dues and projected interest income were both down more than 50%. JobLinks activity was down nearly 33%, and Training required a subsidy of $24,671.80. To end FY 2009 with a balanced budget for all of the organization’s budgeted activities, WASFAA was required to use some $47,845.20 from asset reserves.

As President Bergeron indicated in her Summer 2009 article, Executive Council has reduced the WASFAA budget dramatically in recent years, i.e. more than 53% from FY 2008. At the recent meeting in Portland, Oregon, Executive Council again reduced the fiscal year operating budget for the current year from $289,353 to a total of $249,350. Similar to last year, in order to have a balanced budget at the end of this fiscal year, WASFAA will be dependent on the use of some $50,250 from asset reserves.

WASFAA currently has assets in the way of two checking accounts, a Treasury bill, and two Vanguard accounts totaling $709,311.03. It is the organization’s current policy to strive to maintain in asset reserves 2 years of the most recent 3-year average of operating expenses plus contractual obligations. The association has determined that 10% of the investments should be liquid for emergency situations.

While WASFAA is still able to maintain this objective primarily because of the recent drastic reduction in operating budgets, for the future solvency of the organization, this dependency on asset reserves to maintain balanced fiscal year budgets cannot continue into the future. During the last two years, Executive Council has looked at innovative and less-costly ways to provide essential services to the membership. These have included the recommendations of a special WASFAA Core Activities Task Force resulting in the consolidation and temporary elimination of some committee activities, adding webinars as a method of training, reducing the number of attendees at Executive Council meetings, conducting Executive Council meetings at hotels with lower nightly rates, conducting more WASFAA committee meetings via teleconference, etc.

The best way to continue to support your regional association during these most difficult budget times is to continue to be an active WASFAA member and to attend as many of the planned conference and training activities within your means. WASFAA membership continues to provide you with an effective way to stay current on financial aid issues. It also allows you to receive important information on advocacy for financial aid both at the regional and federal levels. Most importantly the organization provides a number of valuable training opportunities provided by professional colleagues in the profession. And the networking opportunities with colleagues from diverse backgrounds and experiences through volunteering for WASFAA events and committees are endless. Please continue to support your regional association to ensure its future vitality and your professional training, advocacy, and networking needs.

Help your students manage their debt and keep your default rates low.

USA Funds® financial literacy programs, debt management and default prevention tools and services can help you take control of your cohort default rate.

Visit [www.usafunds.org](http://www.usafunds.org) to learn more about the solutions we offer to help you interact effectively with students, during school and after graduation, to promote successful loan repayment and prevent defaults.

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CASFAA Report

Barbara Bickett
DeVry, Inc.
CASFAA President

CASFAA members embraced the theme of the conference “Building Success Together” at the December 2009 CASFAA Conference. Presenters at the conference provided humor, inspirational messages, and updates on what the future may hold.

The 2009 CASFAA Conference opened with Marcel Forestieri also known as the “Jay Leno Clone,” as seen on the Tonight Show© and host of the World Famous “Legends in Concert” from Las Vegas, who interviewed many of our featured speakers such as NASFAA’s Interim President and CEO Joan Crissman, Inspirational Speaker Matt Jones, and Jeff Baker, Director, Policy Liaison and Implementation, U.S. Department of Education. Keynote speaker Mr. Robert Shireman, the Deputy Undersecretary of the Department of Education, spoke at the opening session about how President Obama has elevated post-secondary education with several strategic initiatives.

NASFAA’s Interim President and CEO Joan Crissman, 2009 NASFAA Chair, Barry Simmons, Sr., and Mindy Bergeron, WASFAA President were able to highlight volunteers, financial aid training successes, policy issues, and advocacy efforts within our region and nation. Jeff Baker closed the conference with details of Department of Education rules, regulations, and guidance.

There was training for everyone - SAP 101, “Income-Based Repayment - Could it Get Any More Complicated?, “ 1040 Review, R2T4, Outsourcing, and “Spark the Flame of Excellence and You Too Can Do More with Less.”

During the Ethnic Diversity Committee Reception on Saturday, attendees were entertained by “CASFAA’s Got Talent” where a “Regis Philbin Clone” and CASFAA judges (Yvonne Gutierrez-Sandoval, Charles Conn, and Lawrence Persky) reviewed the dynamic, creative and comical performances of some of our members.

As I have passed the torch to our new association President Yvonne Gutierrez-Sandavol, I wish her all the success for the 2010 year.

NAFAA Report

Lori Tiede
Director of Financial Assistance,
Western Nevada College
Nevada State President

The Nevada Association of Financial Aid Administrators (NAFAA) held the 2009 conference at Harvey’s Lake Tahoe in October. Sixty people attended! This number exceeded the hopeful target of forty and the association membership increased substantially. Talks are in the works for a possible combined conference next year with the Arizona Association of Financial Aid Administrators.

Through the WASFAA President’s Exchange Program, I attended the CASFAA Conference in San Jose in December. The conference was excellent with attendance on a grand scale compared to NAFAA’s. Many thanks to Barbara Bickett and all of the CASFAA members for their hospitality.

Currently, the NAFAA executive team is in the process of organizing the election of officers. The board will also focus on ways to assist members with training and communication needs as budgets diminish and travel restrictions increase throughout the state.
Hello from IASFAA! What a fun year this has been for me as IASFAA President. It has been a more difficult year for IASFAA what with budget cuts (and more cuts), travel restrictions, and all that “stuff” that both directly and indirectly impacts an organization as well as those in it. We have weathered through it – and are optimistically looking forward to the coming year ahead.

IASFAA is so excited to be the host state for the WASFAA Conference April 18-20, 2010 in beeeeee-utiful (that’s the way it sounds when my daughter says the word Coeur d’Alene, Idaho. Due to all that “stuff”), IASFAA was unable to hold the usual Fall Conference this past year. While we greatly missed the opportunity for training and to get together as an organization, we are moving along with Plan B—a one day state-focused event April 21, 2010, to immediately follow the WASFAA Conference. WASFAA will provide the bulk of the training materials we missed by not having a fall conference, so we are taking advantage of our day together to get in our Business Meeting, have state-focused training and talk with representatives from the Idaho State Board of Education, and last but certainly not least, to have that time together with the members of IASFAA.

John Bender from Lewis-Clark State College will be IASFAA President in the upcoming year. So that you can meet him, I’d like to share with you a little bit about him, in John’s own words:

I started in Financial Aid as a work-study student in 1995 and made the jump to the professional side in 1998. During my ten years in Lewis-Clark State College’s financial aid office I have done everything from answering phones to Pell reporting. Currently I oversee the financial aid area of our administrative computing system, import and process SARs (including awarding federal aid), and act as lead on SAP. I hold a BS in Business Administration from LCSC. Julie, my lovely wife, and I live in Lewiston. We spend our free time snowmobiling in the winter, dirt biking in the summer and playing with our 3-year old son, Anthony, as much as possible.

Thank you for making my year as IASFAA President such a rewarding and positive experience—I have worked with such amazing people from all the WASFAA states! I look forward to further opportunities to be involved in both IASFAA and WASFAA.

See you in Coeur d’Alene!

WASFAA Conference
April 18 – 20, 2010
The Coeur d’Alene
Coeur d’Alene, Idaho
Membership by State

- Alaska: 53
- Arizona: 69
- California: 134
- Idaho: 32
- Nevada: 31
- Oregon: 55
- Pacific Island: 42
- Washington: 68
- Out of Region: 37
- Total: 521

Membership by Institution Type

- Not Specified: 44
- Other: 32
- Public (2 Year): 116
- Public (4 Year): 120
- Independent (2 Year): 0
- Independent (4 Year): 58
- Proprietary (Business School): 5
- Proprietary (Technical/Trade): 39
- Health Related/Nursing: 5
- Graduate/Professional: 15
- Consultant: 2
- Government Agency: 3
- Guaranty Agency: 61
- Lender: 17
- Secondary Market: 0
- Servicer: 4
- Total: 521