Barbara Bickett
2015-16 WASFAA President
Senior Director of Regulatory Affairs
DeVry, Inc

Wow, time flies!

Just three months ago we were in Southern California at the WASFAA Conference. Everyone enjoyed the food, fabulous weather and of course, the chance to see old friends.

As I mentioned during the WASFAA Business meeting, I am honored to represent WASFAA for the next year as your President. The past several years have been an incredible experience, learning and preparing for this opportunity to work with the leadership of our region and our representatives from our state leadership. They are an outstanding group of colleagues dedicated to students and the financial aid profession!

For those of you who do not know me, I began my career in financial aid almost 25 years ago working at the Student Accounts Office. Throughout the years I have had the pleasure of working in the business office, financial aid and today in regulatory affairs. My experience spans both for-profits and non-profits, at an individual campus of a small institution to today at a large multi-campus organization serving a diverse demographic of students from certificate programs, Associate, Bachelor, Graduate, Professional and Doctoral degrees.

While we all come from various types of institutions and have varying duties in the course of our daily responsibilities in financial aid, we do share a powerful bond for the work we do in preserving the educational opportunity for all students. Serving in regional and state leadership positions has provided me with a unique understanding of the impact of current and proposed legislation, that it may have a different impact on each state and college, either by a budgetary impact or by the burden associated with the workload it may apply.

We are in a time of constant change and with proposals for more changes pending. It is crucial for the association to meet these important needs of its membership and the profession. As such, I welcome the opportunity to work with our members, the WASFAA Executive Council and state leadership to help lead the association and the profession into the future. To this challenge, I hope to achieve the following:

- Encourage each member to share their love and expertise with the association and profession through volunteer participation in the association.
- Communicating with the membership regarding activities of the association and opportunities for participation.
- Continuing the association’s focus on providing valuable professional and personal training and development opportunities for the membership.
- Identifying common problems and concerns, and unify the association and its partners in addressing and advocating for issues in financial aid and postsecondary education here in the Western Region, and
- Maintaining the association’s leadership role in postsecondary financial aid policy discussions.

We need to be ready for the next phase in the ever changing world of Financial Aid. Each one of you play a part, and I look forward working hard for WASFAA.

Remember, as WASFAA is working for you, we offer tremendous training events for your benefit. Our next event is our Jerry R. Sims Management and Leadership Institute located in sunny Arizona in November 2015. I hope to see you there!
Have you checked out WASFAA’s social media lately? Keep up-to-date with the latest happenings in WASFAA by following us on LinkedIn, Facebook, and Twitter! Just click on the logo to get set up.

While you’re doing that, make sure to also sign up for the WASFAA Water Cooler blog!
I hope you are having a fabulous summer. Summer is one of my favorite seasons. Here in Oregon the weather is usually perfect to take vacation, see the sights, get outdoors for some hiking and just enjoy being alive. This Oregon summer has been unusual in that we have been struggling through high temperatures in the upper 90’s and some days over 100 degrees. Those of you from warmer states may not think much of this, but when hardly anyone in Oregon has air conditioning, it’s a big deal!

Our June WASFAA Executive Council meeting was in San Francisco, somewhere I had never been before. The city is amazing! Luckily I had some time to sightsee and act like a tourist. Seeing the Golden Gate Bridge, Fisherman’s Wharf, riding the BART and the harbor cruise are going to be some major highlights of my summer.

Summer is one of the busier times in our office, and I’m sure it is for you, as well. SAP calculations, summer financial aid, new student orientation sessions and phone calls from anxious freshmen parents… Just remember to take a deep breath and keep going! It’s going to be worth it in the end. I hope everyone gets to take a relaxing summer vacation and come back to the office refreshed and ready to serve students.

The submission deadline for the Fall 2015 issue of the newsletter is October 9, 2015. Please send submissions to communications@wasfaa.org.
Central Washington University has four transitions to announce. Adrian Naranjo transitioned from Director of Student Financial Services to Interim Assistant Vice President for Financial Planning and Analysis. Kelley Christianson moved from Senior Associate Director of Financial Aid to Interim Director of Student Financial Services. Eva Whitsett transitioned from Senior Financial Aid Counselor to Interim Associate Director of Student Financial Services and Maria Rios moved from Financial Aid Counselor to Interim Assistant Director of Financial Aid.

The University of Nevada, Reno office would like to welcome three new advisors to our team: Diana Bernard, previously at UNLV, Justin Howe, a University of Nevada, Reno graduate and current student in the Master of Arts, Educational Leadership program and Kamil Shankar, a recent University of Nevada, Reno graduate and previous student employee in the Financial Aid & Scholarships Office. Welcome!

The University of Oregon team congratulates Financial Aid Counselor Holli Johnson on earning her Master’s Degree in Adult Education & Learning from Oregon State University.

On June 30th, 2015 one of WASFAA’s most devoted members ended her career in the Financial Aid Office of Thunderbird School of Global Management. Catherine King-Todd has been in the Financial Aid Department for 33 years, including 26 years as the Director. She has been very involved in the success of the many students she served and befriended. In her career in Financial Aid, she has served in all of the Financial Aid associations and has been a valued mentor, teacher and colleague.

With the acquisition of Thunderbird School of Global Management by Arizona State University, the Financial Aid Department will be dissolved and all duties will be handled by the ASU Financial Aid Offices. Catherine looks forward to traveling and getting some much needed rest before she moves on to her next career adventure.

Whitworth University is pleased to announce that Traci Stensland is now its Acting Director of Financial Aid. Wendy Olson, the former director, will be Whitworth’s Director of Institutional Research. Congratulations to Traci!

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**CALENDAR of EVENTS**

- **October 15-16:** NAFAA Conference, Las Vegas, NV
- **October 14-16:** WFAA Conference, Tacoma, WA
- **October 13-14:** IASFAA Conference, Boise, ID
- **October 22-23:** AASFAA Conference, Phoenix, AZ
- **October 31-November 3:** CASFAA Conference, Sacramento, CA
- **November 2-4:** SASFAA Boot Camp, Albuquerque, New Mexico
- **November 4-6:** SASFAA Conference, Albuquerque, New Mexico
- **November 16-18:** WASFAA’s Jerry R. Simms Management & Leadership Institute, Phoenix, AZ
- **November 18-19:** WASFAA Executive Council Meeting, Phoenix, AZ
- **December 1-4:** FSA Conference, Las Vegas, NV
Janelle Cook
ALASFAA President
Financial Aid Advisor
University of Alaska-Southeast

Cama-i (cha-my means Hello in Yup’ik) from Alaska! ALASFAA welcomed our new Executive Council on May 1st! In such a large state, we have had our first transition meeting via teleconference, on April 29th and we kicked out the New Year with our 1st official EC meeting on May 20th. I would love to welcome our new ALASFAA EC for the 2015-2016 year:

Janelle Cook, President, University of Alaska Southeast
Shauna Grant, President – Elect, University of Alaska Anchorage
Brittany Dammann, Treasurer, University of Alaska Fairbanks
Katie Bishop, Secretary, Alaska Pacific University

Fred Tolbert, Representative, Alaska Commission on Postsecondary Education

We are excited for the New Year especially for the conference to be in Anchorage Spring 2016! One of our goals is to increase our membership and bring in more FAA’s from the different universities around Alaska. This year, our annual conference will be after the WASFAA conference in April. We are planning to have many different training opportunities for our members in the fall to keep them engaged and updated with any changes that may happen! We look forward to seeing you all in Anchorage in April!

Phil LeBlanc
AASFAA President
Director of Financial Services
Content and Implementation
University of Phoenix- Apollo Group

This year in Arizona I am excited to report that we have already seen a strong willingness to volunteer to support our state association. We have great representation from our long standing volunteers from many of our vendors and schools that offer regular support as well as willingness for involvement from new volunteers or members that are ready to get involved again after years of being AASFAA members. I am glad to have such a well-rounded AASFAA Board and Committee Chairs.

We are finalizing many of the details for our annual fall conference which will be held October 22 - 23, 2015 in the Phoenix/Scottsdale area. Over the years, our state conference has been condensed down to 1 1/2 days to help reduce costs. This year, we are looking at building a more robust conference agenda and planning to fill 2 full days again. We plan to have sessions hosted by the Department of Education, as well as NASFAA, and we are anxious to provide a conference agenda that includes a good balance between technical financial aid sessions as well as professional development and leadership sessions.

So I ask all of my Arizona colleagues to mark their calendars for October 22 and 23 for the AASFAA Fall conference and to consider if they might be interested in volunteering their time and expertise to present on a topic that you are passionate about.
Greetings from the great state of Idaho where summer came barreling in, and we are experiencing a heat wave (we topped 110 degrees recently)! While Mother Nature is giving us a taste of what some in our other regional states are used to feeling, here in Idaho it is the perfect time to enjoy outdoor water activities or your favorite air-conditioned indoor venue.

For those of you I have not met before, my name is Nicole McMillin and I am the Director of Financial Aid at the College of Western Idaho. As someone who was lucky enough to stumble into this profession, I believe I have found my calling and am now entering my twelfth year. I am this year’s IASFAA President and proud to represent the amazing people in our state association. Additionally, traveling with WASFAA’s Training Committee over the last couple of years has allowed me to have the pleasure of meeting many of you.

On a more personal note, I am a native Idahoan and enjoy everything the state has to offer. Just about a month ago I was hunting for morel mushrooms in the Payette National Forest in McCall. This area is also home to one of my favorite winter activities, snowboarding at Brundage Mountain Resort. When I am not out enjoying nature with my husband and two dogs, you will find me using nature’s bounty to cook up savory meals. Cooking is my go-to for relaxing and creativity, I’ve even dreamed up a few names should I ever have the chance to have a show on TV. While that is a long shot, finding ways to reach out and assist our colleagues by getting involved at the state or regional level is not. I encourage everyone to seek out these opportunities (just ask, we appreciate volunteers!) as they will enhance your professional portfolio and networking circuit while also assisting those around you. If you have questions, don’t hesitate to ask anyone from your state or regional associations.

We all operate through volunteer support. I am grateful for those that have stepped up to serve in our state. The IASFAA Executive Committee met at the end of April and welcomed our new members and committee chairs. Members of both past and current councils were in attendance. IASFAA’s current EC and committee chairs are as follows:

Nicole McMillin, President, College of Western Idaho
Dwight Berreth, President-Elect, Northwest Nazarene University
Laura Hughes, Past-President, Lewis-Clark State College
Stephanie Petersen, Vice-President and Conference Committee Chair, College of Western Idaho
Charity Strong, Secretary-Treasurer, Carrington College
Courtney Robinson, Secretary-Treasurer-Elect, Lewis-Clark State College
Daniel Lemus, Communications Committee Chair, College of Western Idaho
Membership Chair – Vacant

We are excited for the year to come and plan to focus on strengthening our committees and attracting more volunteers. Our annual conference will once again be held in beautiful downtown Boise, October 13-14, 2015 at the Grove Hotel. Plans are well underway and the Conference Committee is larger than it has ever been. They are meeting on a regular basis to make sure this year’s event is a must to attend.

As Co-Chair of the Training Committee, I also have to throw in a plug and reminder to watch for Fall Training in each of our member states this fall (typically in October and November). This is a great time to gather with other professionals in your state and have the opportunity to learn and share together on a smaller scale.
The new NAFAA Board members took office on May 1st. We plan to have a meeting in July to set the goals for the 2015-16 year.

Sandi Guidry, President, University of Nevada, Reno

Peter Miller, President-Elect, Truckee Meadows Community College

Tawny Crum, Past President, Great Basin College

Barbara Kiger, Secretary, University of Nevada, Reno

Nick Boschert, Treasurer, Truckee Meadows Community College

Ashley Salisbury, Electronic Services and Conference, University of Nevada, Reno

Leonard Walker, Site Selection and Conference, University of Nevada, Reno – School of Medicine

Two board members completed their service in 2014-15. I would like to thank Past-President Scott Nielsen and Secretary Kristen Board for their years of service.

NAFAA Fall Conference planning is underway.

NAFAA Conference 2015 will be held in Las Vegas, Nevada at the Palms Resort Casino on October 15-16, 2015.

Scheduled speakers include the Department of Education, providing both technical sessions and a federal update. Dan Mann, 2015-16 NASFAA National Chair from University of Illinois at Urbana-Champaign will be joining us. We are also planning system training for the state institutions.

The new UNLV Medical School will open its doors in the fall of 2017. UNLV announced each one of its first medical students will receive a full scholarship. UNLV is seeking to attract high quality students from Nevada and across the nation. This second state medical school was approved by the Legislature to address the desperate need for doctors within the state.

Mary McGlothlan

OASFAA President
Director of Financial Aid
Multnomah University

Happy Summer!

I was unpleasantly reminded recently that there are only a few weeks left until students arrive back on campus for fall semester. While I’m always glad to see them, the end of summer sneaks up on me every year! My name is Mary McGlothlan and I’m the OASFAA President for the 15/16 year. I work at Multnomah University in Portland as the Director of Financial Aid.

Ashley reminded me weeks ago that she needed an article from me for the WASFAA newsletter but as I’ve already stated, I’m caught in a time warp and have lost track of what date is what. It turns out that my procrastinating nature proved beneficial in this case because very recently Oregon announced that we’ve jumped on the “Free Community College” train and with Governor Kate Brown’s signature on July 17th, the train is leaving the station. There are still a number of details to be worked out (aren’t there always) and there is limited funding, but it’s a start. With a state grant program that is already stretched too thin, there are a lot of questions about whether or not this was a good investment of our limited state resources. The bill allocated $10M for the 2016-2017 academic year with $1,000 minimum awards and will be managed by OSAC (Office of Student Access and Completion). We expect more information to be rolled out soon. I hope that you all have a wonderful rest of your summer!
Aloha!

As the new PacFAA President, I would like to take this time to introduce myself. My name is Dayna Isa and I work for Windward Community College as a Financial Aid Officer. Although this is my first term as President, I have held various positions within PacFAA for the past few years, such as secretary and conference co-chair. I also sit on the College Goal 808 Steering Committee.

PacFAA is a very unique association because we represent such a vast area across the Pacific Ocean. With that said, we make it our goal each year to provide our membership with as much training and workshops as we are able.

We just concluded our first meeting in June and welcomed a couple new members to the board: Vice President Jannine Oyama, Honolulu Community College and Secretary Sherrie Padilla, University of Hawaii at Hilo. We are excited to have them on board and are eager to get started on all of our activities for the next year.

Our first meeting was very productive as we tentatively scheduled some financial aid nights, College Goal 808 activities, PacFAA Fall Training and our annual conference. Our focus will be to keep improving our new website and to send more timely communication to our members about important workshops, trainings and, of course, our conference. Troy Takahashi, website chair, has been an integral part in implementing our new platform.

Frank Green of the Travel Institute of the Pacific will serve as the College Goal 808 chair. He is the heart and soul of PacFAA and has planned and chaired College Goal events in the State of Hawaii for over 10 years. This event is one of the biggest and most attended of any outreach fair in our state. We work very closely with our local high schools, community leaders and other agencies to make this event come to life each year.

Please stay tuned for more details and updates.

See you soon.

PacFAA Board 2015-16
Past President: Adam Hatch
President: Dayna Isa
President Elect: Shawn Domingo
Vice President: Jannine Oyama
Secretary: Sherrie Padilla
Treasurer: Kilohana Miller
PacFAA Committee Chairs:
Website: Troy Takahashi
College Goal 808: Frank Green

November 16-18,
Jerry R. Simms Management & Leadership Institute,
Pointe Hilton Tapatio Cliffs Resort,
Phoenix, AZ
WFAA held its annual transition retreat June 4-5 at the Hotel Murano in Tacoma, Washington. Twenty-five members from both the outgoing and incoming Executive Committee attended. The new Executive Committee members were able to benefit from observing the final 2014-15 committee meeting and gained knowledge by spending time with outgoing officers. A great time was had by all!

Our summer training opportunities occurred on July 7th and July 8th on both the east and west sides of the state. Topics included SAP and retention, early awareness, state updates and federal updates.

The WFAA annual conference will occur October 14th -16th at The Hotel Murano in Tacoma. Our conference theme is “Fusion of Ideas”. As financial aid professionals, we function at our best when we cultivate and fuse our ideas, work collaboratively, and partner together. And for the 2nd year in a row, WFAA will invite High School Counselors from around our state to attend our annual conference and participate in a track designed specifically for their needs. This highlights the important work that WFAA’s Early Awareness committee has done under the leadership of April Tovar Villa, Financial Aid and Scholarships Manager from Washington State University Vancouver.

It has certainly been a wonderful start to 2015-16 for the Washington Financial Aid Association.

Three exciting new product innovations to create healthy financial futures.

Financial Avenue | Default Prevention | Verification Gateway

Inceptia
A division of NSLP

Learn more about our new breakthroughs in financial wellness. Visit Inceptia.org
If you haven’t already seen it, you should check out the Training Committee’s webpage! We have been working diligently over the last few months to add new resources and training opportunities for WASFAA members. Some of the new and improved features include a landing page (shown here) with links at the top of the page that take you to additional information and information at the bottom of the page to keep you updated on training opportunities offered by our committee.

The first bullet links you to a monthly listing of training opportunities brought to you as a collaborative effort between the WASFAA Training Committee and CASFAA. Next, is a link to professional development resources, where we would like to highlight a new addition A History of Need Analysis. This informative webcast is brought to us by our President-Elect Mike Johnson. We are positive you will enjoy the content as well as the presentation; we appreciate Mike for recording this topic for us! The last bullet will take you to a condensed list of the training topics presented by the Training Committee over the last couple of years.

Please contact us if you are interested in knowing more about the Training Committee or have additional ideas or resources you think would be beneficial to the WASFAA membership.
Ethnic Diversity Committee Update

Helen Faith
Ethnic Diversity Representative
Director of Financial Aid
Lane Community College

As the 2015-16 WASFAA Ethnic Diversity Representative-at-Large, I am grateful for the opportunity to serve WASFAA members this year. One of my primary duties in this role is to serve as the chair of the Ethnic Diversity Action Committee (EDAC). I’ve just formed this year’s committee, and we had our first monthly phone meeting recently. I’m excited to work with such a great group of financial aid professionals from all over the WASFAA region! We have a big list of goals to accomplish this year:

- Increase the number of Ethnic Diversity scholarship applicants—did you know that we offer scholarships to encourage participation of our members from ethnic minority groups at the Annual Conference, Sister Dale Brown Summer Institute and Jerry R. Simms Management and Leadership Institute? What makes this opportunity all the more exciting is the fact that we’ll be able to offer more scholarships than before, thanks to the commitment and generosity of WASFAA’s Executive Council.
- Select scholarship recipients for each event mentioned above—after receiving unprecedented floods of applications, we hope!
- Present a breakout session at the Annual Conference in 2016 on issues relevant to minority WASFAA members and students in our region—we would love to hear your ideas on the kinds of topics you’d like us to present.
- Produce a publication for use at WASFAA events describing EDAC scholarship opportunities and the work that our committee does for WASFAA members.

In addition to managing this to-do list, I also work with the committee to respond to questions from the Executive Council and to provide feedback on issues impacting WASFAA members and students of color. One question that has been raised a number of times over the past several years is whether WASFAA should broaden the mission of EDAC to recognize and honor diversity in its many forms beyond ethnic diversity. While there are many reasons to support such a move, there have also been significant concerns raised that the original mission of EDAC could be damaged in the process. EDAC has a long and deeply rooted tradition of supporting ethnic diversity, the committee having first been established in response to the public outcry regarding the LAPD’s beating of Rodney King in 1991 and the subsequent acquittal of the police officers involved. The recent massacre of African American churchgoers in Charleston and the ongoing atrocities committed against people of color throughout our nation are a painful reminder of the continued struggle of minority groups for safety, equality and justice.

I would love to hear from all of you; listening to you will serve to strengthen my work on your behalf. What are your thoughts on broadening EDAC’s mission? How can WASFAA serve ethnic minority aid administrators and students better? What are your concerns, and what are we doing well? Please drop me a line at faithh@lanec.edu or give me a call at 541-463-5266. I look forward to the conversations to come.

Save the Date:

November 16-18,
Jerry R. Simms Management & Leadership Institute,
Pointe Hilton Tapatio Cliffs Resort,
Phoenix, AZ
Federal Relations Committee Update

Tami Sato
Federal Relations Co-Chair
Marshall B. Ketchum University

One of the goals of the WASFAA Federal Relations Committee is to continue WASFAA’s advocacy efforts by identifying federal issues where comment or recommendations would be appropriate. Reauthorization of the Higher Education Act may not happen for a few years but the preparation and forming of ideas is certainly stirring. Here is a list of some FRC advocacy efforts: some where we are asked you, the members, to respond and some where FRC drafted a letter and the WASFAA Executive Council members approved it to be sent.

List serve messages where we have asked you to advocate and let your voice be heard

- Surprise, a bipartisan resolution (H.Res.294) was introduced to support the continuation of the Perkins Loan program. In this case we needed you to encourage your members of Congress to sign onto the resolution and become a co-sponsor. More names make a stronger statement! Any bets on whether Congress will reauthorize or extend Perkins before the September 30, 2015 sunset date?

- Don’t you just love those systems that make it easy for you to write your congressional leaders? With ACCT all you did was enter your zip code and you had a letter template that was sent automatically. Both the House and Senate have spending bills that rescind Pell Grant funds for FY 2015 (at the tune of $300M and $370M) along with cuts to other programs like Federal Work Study and SEOG. We need to urge rejection of these bills and a push for a bipartisan solution that will raise the current funding caps.

- Are you still helping students after they graduate with repayment problems? The Consumer Finance Protection Bureau (CFPB) has put out a request for information on recommendations that will strengthen student loan servicing. They estimate that there are more than 40 million federal and private student loan borrowers and 8 million borrowers in default. What proposals or processes can you suggest to help these students in distress?

You can access the approved letters that were sent from WASFAA website under “About WASFAA” and scroll down to the Federal Issues Section. Many thanks to members who took the time to advocate!

Beryl Schantz
Federal Relations Co-Chair
Compliance & Training Officer
CSU-Sacramento

Advocacy by FRC when drafting letters to be approved by the WASFAA council and sent

- The Notice of Proposed Rulemaking (NPRM) from last year’s negotiated rulemaking sessions on cash management, repeated coursework and conversion of clock hours to credit hours was released. Since agreement was reached on the last two issues, we focused on the cash management proposals. Specifically why electronic disbursements are best for students instead of paper checks, that the prohibition of fees or charges to students in the 30 days following when Title IV funds are deposited was much broader than what the negotiating committee discussed and students should be responsible for the fees they would have with other financial accounts such as overdraft fees, and finally that posting third-party contracts, in full, on institutional websites would serve little purpose towards transparency because students and parents would not take the time to read long, legal language in a full contract. We believe either a common template of terms or just a process where the contract can be provided as requested would make more sense.

- WASFAA also sent a letter supporting the House resolution H. Res. 294 and provided the reasons why the Perkins Loan program is beneficial for students as a low-cost financing resource. This program expired three years ago but has been extended until September this year.

- Did you know that there are 3.8 million borrowers enrolled in income-driven repayment plans? Did you know that a startling 57% of borrowers in PAYE and IBR miss the deadline to update their income information to ED? These student risk facing unmanageable monthly payments or becoming delinquent and we want to support the PAYE negotiators that wrote a letter urging the IRS to work with the Department of Education to develop and implement a process that would allow borrowers to provide a multi-year consent for ED to access tax information for the limited purpose of determining eligibility and the monthly payment amounts for income-driven repayment plans.
The 2015 WASFAA Sister Dale Brown Summer Institute was held on the beautiful campus of Pacific Lutheran University in Tacoma, Washington June 7-12, 2015. This week-long training covered NASFAA CORE Material in preparation for the attendees to take the NASFAA credentialing tests. We had 85 attendees with 15 of them receiving a scholarship to assist in offsetting the costs of the training. There were three training tracks available: Basic, Intermediate and Clock-hour.

Participants were in the classroom from 8am-5pm - a true boot camp. However, there was some fun intertwined in the training. The faculty held a photo contest throughout the week for the most creative photo. Participants were asked to take creative photos and then post them to the WASFAA Facebook page using #2015SDBSI. There were several entries and the faculty had a difficult time choosing the winner. In fact, we had to choose two. Jessica Piper from Northwest Nazarene University won for the most creative serious-side of training picture with her four days of training material. Daniel Carlos from the University of Idaho won for the most creative fun-side of camp picture with his four days of snacks and treats in the fridge. These photos and many others from the #2015SDBSI can be found on the WASFAA Facebook page.

On Thursday night, we celebrated all our hard work at a banquet. Vanessa Gibson, Yuliana Martinez and Ashley Johnson from Antelope Valley College were our student speakers. The evening was filled with relief and excitement as the week was coming to a close. Now the participants will be able to study for the NASFAA credentialing tests and add to their résumés – good luck!
Oh, the Places You’ll Go (and the people you’ll meet): The networking aspect of this training is invaluable. The faculty connection alone is a godsend, but meeting people from all over the northwest who do what you do or specialize in one aspect of what you do, makes for an invaluable career-long resource to tap. Plus, I had the best roommate. Who doesn’t want a forever friend?

If I Ran the Circus: The SDBSI format is intense but manageable. If I ran this circus, I’d do it the same way. My biggest takeaway is being aware of what resources are available to me and how to access them. There was a point in my training when my co-worker slammed down her SDBSI manual from years past on my desk and said, “this is a great resource.” I laughed in her face. There was no way I was touching that monstrosity with a 10-foot pole. Now I have MY OWN! But I am oriented to it. I know where to go to get the information I need.

I Can Lick 30 Tigers Today: In short, I walked away with a better understanding of federal aid and a better appreciation for the way it’s processed at my own institution. I also now have ideas of how to streamline certain processes and create others. I feel empowered and knowledgeable. I could probably lick 40 tigers today if I had to!

Thank you WASFAA for making this training available, as well as the scholarship that allowed me to participate. The training really is priceless.

Dora “Cindy” Martin
Student Employment Admin III
Truckee Meadows Community College

To all the people who invested their time, efforts and passion for financial aid into the WASFAA Sister Dale Brown Summer Institute 2015: I just wanted you to know this was one of, if not the best events I have ever attended. Tacoma, Washington was chosen as this year’s location for the WASFAA Sister Dale Brown Summer Institute and Pacific Lutheran University hosted the event beautifully. The weather was unusually warm and sunny, and this provided for an even more pleasant experience as this enchanting campus was in full bloom. I took full advantage of each break to explore and capture all the beauty around us and ran into fellow classmates doing the same thing. This refreshed and energized me, allowing a more rejuvenated mind that was needed to encompass each module our expert instructors provided.

I have worked in financial aid for just over six months and while I have gained an overall understanding, I have also become acutely aware of how much more I must learn to be able to provide accurate, timely answers to questions and/or problems that arise. I was so pleased with the presentations, instructors and this year’s chairperson, Laura Hughes. They all delivered their wisdom and expertise in each area with
levity, passion, honesty and real-life experiences. This made it easier to comprehend and organize the copious amounts of information being given to us. They made the phrase "It Depends" come to life as I had heard this so many times in my own department and now understand why.

I had the opportunity to explore the beautiful campus of PLU, and I loved the architectural design of the buildings and the lush plants that surrounded them. I can’t say that I was super excited to be staying in the dorms, but I can say that it turned out to be quite an enjoyable experience. Just think, when do you have the opportunity to relive the college dorm lifestyle? I thought of it as a fun adventure and definitely made the most of it.

The week long training consisted of large group lectures and small group discussions. We would start each morning with our small groups and discuss in greater detail the topics that were learned the day prior. We had a good mixture of people in our small group, all with differing levels of experience in financial aid. It was relevant that we were there to not only learn from the faculty, but also from each other. My group was led by Abril Hunt, Senior Financial Literacy Trainer with the Education Credit Management Corporation. I want to thank Abril for sharing her wide-range of financial aid knowledge and for really encouraging us to ask questions. You were awe-some, Abril!

Along with the training, this conference provided the opportunity to network with other financial aid administrators. Meeting people and sharing ideas I think is one of the best ways to enhance our knowledge and improve our understanding in the field of financial aid. I was able to connect with some familiar faces as well as some new ones. It was nice getting to know my peers and to see the passion we all share for student financial aid. From the start of college to graduation, we, as financial aid administrators, are there through it all. I think this is what makes our roles not only important in higher education, but even more important in the lives of our students.

Overall, I feel like I am ready for this new year to come and am certain that the knowledge gained during this conference will not only benefit our students but also our University. I want to express my gratitude once again to WASFAA for the scholarship opportunity, and also to the faculty that participated in the SDBSI. I am extremely grateful for the experience, and I look forward to attending more WASFAA events in the future.
**Briselda Ortega**

Financial Aid Representative  
Lane Community College

The WASFAA Sister Dale Brown Summer Institute faculty welcomed us at the Pacific Lutheran University in Tacoma, Washington. Throughout this institute we had the opportunity to learn about Financial Aid fundamentals and network with other financial aid professionals passionate about their jobs.

The conference was arranged to cover thirteen modules and a morning small group discussion. The morning discussion turned out to be the most helpful way to get clarifications from the previous studied modules. During these sessions we got to practice what we learned and apply it into real life scenarios. During the week we conveniently stayed at the college dorms which made for a beautiful short walk to the conference room. We also got three meals covered that we enjoyed eating while sitting on their beautiful balcony, looking at the pines and a pond which had beautiful flowers blooming in it.

Overall, the conference had an intense curriculum, but the faculty made it fun and easier to understand. For me, it was a great reinforcement on financial aid fundamentals and I made a great network with other financial aid professionals.

**Julia Schumacher**

Financial Aid Administrator  
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I feel fortunate to have been chosen as a recipient of a scholarship to attend the Sister Dale Brown Summer Institute. Last October, I began my journey into the big, wide, sometimes intimidating world of financial aid. Being so new, you don’t know what you don’t know, but sometimes you also don’t realize how much you do know.

Razzle Dazzle College is a proprietary, clock hour cosmetology school. As you can imagine, finding training for clock hour financial aid can be quite difficult. When I first heard about Summer Institute, not only was I thrilled with the idea of a weeklong training in financial aid but then to find out they have a track and training exclusive to clock hour schools. How could I get so lucky?

The information I gained from my instructors was priceless. Their belief in me and guidance will and already has provided my career with confidence and a stronger knowledge base. At Summer Institute, being able to begin each morning with our small group gave us time to work through problems, hypothetical and otherwise, which is a luxury I do not always have in my own office as the sole FAA at my school.

Networking was one of the most important parts of the training. I had the pleasure of meeting some amazing colleagues during the training. Our instructors, especially Laura, stressed the importance of reaching out to those around us, meeting new people and making new friendships. I did all of these and I know that I will be a better Financial Aid Administrator because of it.

Truly, I am without the words to properly express my thankfulness for being selected for this scholarship. I found a new appreciation, passion and love for my career. For that, I would like to thank everyone who made that possible, my newly discovered colleagues and those I networked with so well - I now consider them my friends (you know who you are).
Difficult conversations in the financial aid office often arise because they start with an emotional topic: money. Now add the fact that your job entails helping students while still complying with external guidelines and rules. The entire process, from completing the FASFA, to making tuition payments, to selecting the best loan repayment option, can be emotionally challenging for students and their families. This heightened anxiety can play itself out in your office or on the phone when parents and students express their frustration. Here are some top tips to help you navigate difficult conversations, while still providing commendable customer service.

Elevate Your Inflection
In customer service, how you say something is just as important as what you say. The peaks and valleys in your voice, also known as inflection, can greatly impact the conversations you have with your students.

- Smile—yes, actually smile!—when you answer the phone. When you smile, the soft palate at the back of your mouth raises and makes the sound waves more fluid. Smiling also works for face-to-face conversations.
- Listen to a recording of your voice for an honest impression of how you project yourself to other people. If you’re not able to record yourself in a real customer service situation, consider creating a role-play exercise for your team.
- Lubricate your vocal cords by drinking water during tough conversations. Liquids can help you maintain a smooth and consistent tone. Holding a beverage during an in-person meeting also provides a tactile focal point to help you remain calm.
- Breathe with long, slow, deep breaths to improve the inflection in your voice. When you’re upset, breathing becomes quicker and shallower, which causes your vocal cords to tighten—making your voice go up and sound strained.

Heighten Your Empathy
Empathy—or the art of seeing a situation through someone else’s eyes—is another essential component of stellar customer service. Although empathy doesn’t come naturally to everyone, it can be learned through a few simple steps.

- Show that you are actively listening to the person by nodding your head frequently, verbally acknowledging what the speaker said from time to time, and maintaining eye contact.
- Ask questions to obtain as much background information as needed. “Listen to learn” rather than proactively preparing your response as the person is talking. Take notes as needed so you’ll be ready with follow-up questions.
- Agree with the person’s concerns—when appropriate—and try to see things from their point of view. Use phrases such as “I’m sorry you’re frustrated”. Consider if you would also feel upset if you were in the same situation.
- Remember that although the person’s frustrations may appear to be directed toward you, don’t take it personally. You are simply the person they are venting to at this point in time.

Set Expert Expectations
An expert is a person with extensive knowledge, experience, and/or ability in a particular subject or area of study. In this way, you and your team members are uniquely qualified to counsel students who have financial aid-related questions or problems.

- Respond with understanding rather than just citing rules and policies. Be firm and establish yourself as a trusted expert. As a last resort, pull in another team member or escalate the situation to your supervisor.
- Provide a list of possible next steps, including an example of how you were able to resolve a similar issue in the past. Communicate that the situation is not unique and that others have encountered—and overcome—similar issues.
- Stick to your script and don’t let raised voices or heightened emotions pull you off your game or put words in your mouth. Avoid the customer service pitfall known as anger mountain. If you remain calm, the person is more likely to remain calm.
- Lighten the mood with a personal story or anecdote. When used judiciously—and avoiding any hint of sarcasm—humor can help disperse tension and build a relationship with someone based on trust and liking.
In recent years, improving student safety on campus has become a national hot-button issue we’ve seen often in the news. For campus officials, the resulting reporting requirements have a long history which has evolved over time into a complicated and time consuming endeavor.

For some, these reporting requirements may seem like another administrative burden that continues to intensify. For others the issue is regarded as worthy of the time and effort involved, with the ultimate goal being to create a more secure collegiate environment. Whichever side of the fence you find yourself on, higher education institutions must comply with these changing requirements, lest they potentially suffer a multitude of consequences.

**Background**

Campus safety requirements in the Higher Education Act (HEA) date back to the Crime Awareness and Campus Security Act of 1990. During the reauthorization of the Higher Education Act (HEA) of 1992, amendments were added which included some of the first policies pertaining to sexual offenses on campus.

In 1998, the HEA amendments expanded the requirements and renamed the law the Jeanne Clery Disclosure of Campus Security Policy and Campus Statistics Act, currently known as the Clery Act. In 2000, the Victims of Trafficking Act or the Campus Sex Crimes Prevention Act was enacted. In 2008, HEOA expanded the requirements to address the need for mass Emergency Notification systems on campuses.

Finally in 2013, the Campus Sexual Violence Elimination Act, or Campus SaVE provisions (Section 304 of the Violence Against Women Act or VAWA) went into effect.

**New Reporting Requirements**

The Violence Against Women Reauthorization Act of 2013 was enacted on March 7, 2013 and the final rule was issued on October 20, 2014. This expanded the reporting of incidents of sexual assault, dating and domestic violence, and stalking (including cyber-stalking). The Annual Security Report (ASR) must include this additional information about policies, procedures, and training programs aimed at sexual assault prevention and response. The new programmatic and training requirements include the following:

- Awareness Campaigns;
- Primary Prevention;
- Risk Reduction;
- Bystander Intervention; and
- Specialized Training for Adjudication Officials.

These statutory changes for the ASR’s actually began on October 1, 2014; however, the final regulations will go into effect on July 1, 2015. Until that date, institutions are to make a good faith effort to comply with the new statutory requirements. See DCL GEN-14-13 for details.

**Consequences of Noncompliance**

Federal Student Aid monitors and enforces the Clery Act by conducting campus crime program reviews. Fines for non-compliance can reach up to $35,000 per offense. Other consequences can also include limitation, suspension, or termination of the eligibility for federal student aid programs. An institution may also be denied their recertification or may have a provisional Program Participation Agreement (PPA) revoked. The secretary has the authority and “shall impose” a civil penalty for any Clery Act violation that is considered at the level of a “significant misrepresentation”.

**Best Practices**

The following are some best practices recommended by Jim Moore of the Clery Act Compliance Team (clery@ed.gov) at the Department of Education to assist in the compliance of all the Clery Act requirements:

- Appoint and empower a Clery Act/Part 86 Compliance Officer;
- Develop an understanding of “Clery Geography”;
- Identify and train “Campus Security Authorities”;
- Specifically inform students and employees about how to report crimes and emergencies; and
- Develop a VAWA Implementation/Integration Plan.

Another recommendation is to utilize the Federal Student Aid Assessments for this purpose. **Activity 5: Consumer Information: Clery Act (Campus Security)** contains a checklist to help
you determine if your institution is meeting all the required components. It begins with the Annual Security Report (ASR) requirements, and contains citations throughout in order to easily reference original regulatory documentation. This document was last updated in December 2014.

Finally, be sure to create a dedicated Consumer Information page on your institutional website containing each disclosure, a brief description, and hyperlinks or references to source material. The benefits of this tactic are twofold; disclosures are easy to update and maintain and more importantly, consumers can reference important information in one comprehensive listing. Another way to strengthen these two objectives is to add a hyperlink on your website’s homepage, leading readers to the Consumer Information page.

Conclusion
If you know your institution is not in compliance, there is still time. Take the information I’ve outlined above and act now. By making a good faith effort to comply with these important federal regulations, you will be part of the movement to assure that our college campuses are a safer place for all students and educators.

4 Guidelines for Effective Communication

Dianne Fulmer
Director of School Partnerships
Financial Aid TV

Effective communication helps us not only impart information but also transfer that content in a manner that is received and understood by someone in the way it was intended. Here are some essential strategies for successful communication:

1. Tailor your message to the audience.
Keep in mind who you are communicating with when crafting a message. If you emailing a financial aid colleague, feel free to use federal acronyms without defining them like Pell LEU or SAP. In contrast, if you are speaking with a student, distill complex concepts into simple, memorable terms. Reduce the use of technical terms or if needed define them and use additional descriptors to convey your message.

2. Listen with your mind not just your ears.
Pay attention and let the other person talk without interrupting. In fact, if you listen with both eyes and ears, you may find it easier to focus and not get distracted.

3. Put the speaker at ease.
As Dr. Vincent Covello, a behavioral scientist, suggests show compassion, conviction and optimism. This can make the difference between an understanding student and an angry student. Don’t inundate them with regulations and verbatim rules. Tell them you care about their situation, that you will help them understand their options and/or get to the root of the problem, and ensure, if applicable, the circumstance does not happen again.

4. Be aware of cultural differences.
Mindtools.com suggest that when you communicate cross-culturally, try to keep your communication “clear, simple and unambiguous.” Also, remember that there may be differences in non-verbal communication regarding eye-contact, seating arrangements, and personal distance.

Resources and References
§668.14, 668.16, 668.41, 668.46, 668.49
Legislation: 20 USC§ 1092(f)
34 CFR Part 668 Federal Register October 20, 2014, Violence Against Women Act; Final Rule
Federal Student Aid Assessments – Consumer Information: Clery Act (Campus Security)
Handbook for Campus Safety and Security Reporting (revised February 2011; New edition will include VAWA guidance)
Handbook Help Desk: HandbookQuestions@ed.gov or 1-800-435-5985

Mindtools.com
Here are points to share with borrowers about income-driven student loan repayment plans:

- **Don’t assume you won’t qualify.** Encourage borrowers to apply if they believe an income-driven repayment plan could help them achieve more affordable payments — even if they’re not sure their income will allow them to qualify. The only way to know for sure is to apply, and the application process is easier than ever before, now that borrowers can apply online through the U.S. Department of Education.

- **Stay on the plan.** Once they’re on an income-driven repayment plan, borrowers must submit updated income information each year. Even if they no longer qualify for reduced payments as a result, their standard payments could be lower if they re-apply than if they fail to re-certify. And continuing on an income-driven repayment plan helps ensure they’re making qualifying payments toward loan forgiveness.

- **Don’t forget your anniversary.** Each borrower’s deadline for submitting the required income information is dictated by the date that particular borrower entered the plan. So advise your borrowers to be mindful of their own anniversary dates, and to reach out to their servicers well in advance of the deadline, to allow time for processing.

- **Take advantage of the data retrieval tool.** Just as students and parents can use the Internal Revenue Service Data Retrieval Tool when completing the Free Application for Federal Student Aid, borrowers on income-driven repayment plans now can use this handy online tool during re-certification. Let borrowers know about this option, which simplifies the process by eliminating the need to submit copies of tax returns or other income documentation.

You know your students and borrowers best. When they hear from you, they’re likely to take notice. So leverage your position as a trusted adviser by providing information about income-driven repayment plans — and the requirements for remaining in those plans.