It’s incredible just how busy the past three months have been. I say this every year, believing that it could never get any busier, and then along comes the next year – busier still!

I’m fortunate that in PacFAA there are others willing to step up and help. Though as much as I have tried to relinquish many of these duties and delegate some of the responsibilities, it just never seems to be enough. This time of the year brings on High School counselor training, Financial Aid Nights, College Goal 808, WASFAA and NASFAA meetings, Conferences, Conferences and a few more Conferences! All of this on top of a very busy fall enrollment at my ‘real job’!

One of the big happenings each year in the Islands is coordinating, developing and conducting a Financial Aid update for the High School Counselors throughout the State. This involves collaborating with colleagues on 4 separate islands to arrange for facilities and meals; putting together the presentations and traveling to each of the Island for a full day work shop. These are large events on each Island and are attended by virtually every High School Counselor and representative from interested community organizations who work with our future students and their families. In addition to a Financial Aid update, other associated organizations are invited to provide updates for their programs. All in all, these workshops are seen as a ‘Fall Event’, complete with meals and entertainment. As I begin to prepare for these events, and start looking at the impossible travel schedules, I find myself constantly complaining about the time it is taking - there are other things I should be doing, like my ‘real job’ - and wondering, many times out loud, “why am I doing this?” The sessions always seem to go smoothly and are very well received. At the end of each session, dead tired and exhausted, I realize just how valuable the workshops have been and how crucial the relationships with all of these people are. The counselors are really our front line soldiers! They are truly responsible for guiding the students and families in the right direction. The more information we can get to them, the more knowledge they have the better prepared the students are by the time they reach our office.

I have the same type of feelings coordinating the Financial Aid Nights at local High Schools throughout the State. In Hawaii we have 72 High Schools on 6 Islands, and during a three month period we (PacFAA) will conduct 69 sessions – still working on those remaining 3! I’m very fortunate to have great support within PacFAA, with over 20 FAOs presenting these sessions – and I no longer have to make 15 trips to the Neighbor Islands. Still, at least a dozen times each season I find myself on the road, late at night driving back over the mountains heading home for another 10:00pm dinner! My staff will attest to the fact that by this time of the year, I can be heard muttering the same words as I leave the office for another evening session, “why...

continued on next page
am I doing this?” By the end of the evening, I have my answer – it’s written all over the faces of the students and their families! There are so few things in life that I feel competent or even comfortable enough with to be able to stand in front of 200 people with the confidence to say “you can do this and I’m going to help you!” While I know that most of these students will not be attending my institution, as a result of this brief relationship with them, I know that some of them will be at your Institutions. Knowing this is what keeps me going as I head out tomorrow night to do it again!

Because I still seem to have additional free time (say what????!!) I also serve as the State’s co-chair for College Goal Sunday, or as it is now known in Hawaii, College Goal 808. This year we have decided to double the number of sites and expand beyond Sunday by offering sessions on a weekday. Along with colleagues from PacFAA and multiple High School Counselors there is a massive effort underway during this period to coordinate over 200 volunteers, at 16 sites on four islands. As we get closer to the actual dates, I again find myself hanging my head and muttering to myself (because by this point my staff no longer listens to me), “why am I doing this?” By now you get the idea – once the sessions are completed and we sit back knowing that 100s of FAFSAs have been submitted – with a very good chance that they are correct!

This is also are very busy period for our profession. In the last 3 months I’ve managed to rack up over 50,000 frequent flyer miles and more hotel nights than I can count attending meetings, conferences and training sessions. In addition to updating our skill sets, it is a time that we connect and reconnect with our colleagues around the country. These relationships are invaluable and are a significant factor in being able to maintain our sanity. They are our support network, sounding board and a sympathetic ear who listen to our gripes and understand our plight! I’m proud to say that many of the people I have come to know in our profession are today some of my best friends. In addition to our professional activities I’ve been fortunate to be able to spend quality down time with these friends. Time on a boat out in the ocean, sitting in a local watering hole somewhere in the country sharing a pint (and occasionally a fine bottle of wine), watching sunsets in locations near and far, enjoying great company at dinner – all with people I respect and admire, and sincerely enjoy spending time with.

As the holidays come crashing down on us all, I hope you will take a moment to realize just how valuable you are how important all of your efforts are and! Without your efforts in working with High School counselors, students and their families and connecting with your colleagues our lives would be much less full. And after you’ve taken a moment to pat yourself on the back, run, don’t walk, to your nearest spouse, significant other, children, love ones, family members and give them a hug and a kiss and let them know how valuable they are to you!

Wishing you all a safe and wonderful holiday season

Mele Kalikimaka and Hau’oli Makahiki Hou
Note from the Editor

Ashley Munro
Communications Committee Chair
University of Alaska Fairbanks

The communications team is happy to bring to you the winter issue of the WASFAA Newsletter. We hope you are all well rested after holiday parties, vacations and time off! Many of us are headed into another round of disbursements and will be busy soon, but we hope you find time to see what others in the region have been working on. We’ve decided to host “I Love WASFAA” week Feb 10-14. During that week, you’ll find WASFAA trivia questions posted to the blog and to our Facebook page. If you answer correctly, you’ll be entered to win some fun WASFAA prizes. So, register for the WASFAA Water Cooler, ‘like’ us on Facebook and study up on your history! You’ll notice we’ve provided you some study material throughout this issue. Good Luck!

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Random Trivia

The #1 goal of WASFAA this year IS to be a leader in providing training and professional development opportunities for members.

There are 7 states and 1 region within the WASFAA region. The 7 states are Alaska, Arizona, California, Idaho, Nevada, Oregon and Washington. PacFAA covers Hawaii and the Pacific Islands.
ALASFAA Report

Phong Moua
Alaska Pacific University
ALASFAA President

As we finish up last minute things for the Fall, it seems that Spring is approaching very quickly. It is a never ending cycle of processing for financial aid, and that is why we love it. The transition from Fall to Spring is a very short time frame that can be very stressful for many of us. Make and attempt to enjoy the holiday festivities and try not to be the scrooge, it is a new year by the way.

The larger part of ALASFAA’s focus in the Fall was on our conference. It was a great conference, thanks to executive council for their hard work in coordinating the event and to all the presenters and attendees. I was ecstatic to see an increase in membership and in conference attendees this year compared to past years. We asked and have received some great suggestion for presentation topics for the next conference.

As with a few other states our conference was in October and the government shutdown meant we did not have a federal trainer. We are working with Department of Ed to schedule a federal update early in the Spring when most of our members will be back in the office after the holiday season.

ALASFAA has partnered with the Alaska Commission on Postsecondary Education (ACPE) to send out a quarterly newsletter to the membership of news and updates on financial aid. The first issue is scheduled to be out in February.

PacFAA Report

Cathy Bio
University of Hawaii-Maui College,
PacFAA President

Aloha from PacFAA!

The make-up of the PacFAA board has shifted as members moved, found new jobs, and were re-assigned to different positions! A small group of dedicated and loyal members remain to carry out our duties as we approach our busy financial aid season! I’d like to personally thank each of our board members who stepped up and took on additional duties as needed.

College Goal Sunday has transitioned to College Goal 808, with the paper and pencil presentation format is shifting to an online submission workshop. Oahu will be offering two back-to-back workshop times at five high school locations on a Sunday, followed by five evening workshops at different high schools on a weeknight. The neighbor islands will be offering one Sunday and one evening workshops respectively. We have a good crew of both high school counselors and financial aid staff members to assist. Mahalo to Dayna Isa for helping to coordinate volunteers.

Financial Aid Night presentations are also going strong, with a revised power point presentation that the board approved earlier this year. Mahalo to Kilohana Miller, Treasurer, from Maui College in spearheading this effort.

In our efforts to align our goals with WASFAA’s Strategic goals related to communication, we will be moving to the Wild Apricot software product to help manage our website and membership. Vice President Cameron Rivera is working hard to make this happen prior to start of our spring conference registration! Please lookout for our roll-out targeted for February!

And last but not least, plans are now underway for our annual Spring Conference. Conference Chair, Jannine Oyama, from Honolulu Community College, has started convening her team of colleagues to plan for the conference, scheduled for March 31- April 1 at the Ala Moana Hotel. Well be welcoming and hosting NASFAA Chair, Craig Munier, who will be visiting the islands for the first time. And, of course, we will have WASFAA President, Frank Green, amidst our presence! We hope to see some of you there!

Aloha and Happy Holidays to you and your families from the PacFAA ohana
CASFAA has been busy! Thank you to Deb Barker-Garcia and Lynn Garcia, conference co-chairs, for a fabulous conference! We had approximately 800 attendees with close to forty vendors on site! WASFAA was represented by Kay Soltis, Frank Green, and Jack Edwards – thank you for coming. We’ll see you next year in Anaheim, CA – November 2-5 for “Seasons of Change”.

Thank you to all of our presenters, who came to us from our membership base, Department of Education, and NASFAA. A special thank you to Justin Draeger and Jeff Baker for speaking – both general sessions were well attended.

The highlight for me at this year’s conference was to present the awards. The awards committee selected outstanding CASFAA members. The awards were given to:

**Cheryl Foster Hunt - Honorary Lifetime Membership**

Lifetime Membership is given to a person who has made major and significant contributions to the profession over an extended period of time. Lifetime Membership awards are the highest awards CASFAA can make and should only be awarded in exceptional cases. Longevity is not, by itself, sufficient for the awarding of Lifetime Membership.

In the beginning, Cheryl was involved with the High School Relations Committee – the go to person for train-the-trainer, presentation updates, and main speaker for all the high school counselor sessions. Cheryl spent many evening and weekend hours working with committee members preparing presentations and stuffing counselor bags; and, transporting those bags to the various sessions across California. Cheryl continued to support the financial aid community when she accepted an opportunity from USAFunds, Inc. Cheryl provides training for the western region regarding federal regulatory updates, specific training sessions for CASFAA’s conferences, and most recently training on Map 21.

**Kay Soltis and Tami Sato - President’s Special Award**

The President’s Special Award is given to an individual who has made significant contributions during the past year to the success of CASFAA. The recipient of this award is selected solely by the current President of CASFAA. Current members of the Executive Council are eligible for this award.

Strategic planning is not fun and can be frustrating; but, not with Kay and Tami! Kay and Tami took time to review CASFAA’s strategic plan, provide documents for updating and monitoring CASFAA’s strategic plan for the next three years. Kay, thank you for moderating the executive council’s strategic plan meeting. Tami, thank you for providing your valuable feedback and the tracking documents.

**Lori Nezhura - Distinguished Service**

The Distinguished Service Award is given to a member of the financial aid community, government official, private citizen, or a corporation or other organization for outstanding service to the profession. CASFAA membership is not a criterion for this award. Current members of the Executive Council are ineligible for this award.

For the past five years Lori has been the individual that CASFAA has relied on to provide insight and guidance regarding legislative updates and providing logistical support for Day at the Capitol. Lori has arranged legislative meetings, suggested dates that would coincide with financial aid and higher educational issues. The morning begins with Lori providing an update and briefing on the “how-to’s” of legislative visits and the day-to-day operations of the legislature. Day at the Capitol has been extremely successful because of your hard work and dedication to this event.

**Sunshine Garcia - Meritorious Service**

The Meritorious Service Award is given to a CASFAA member in recognition of an outstanding achievement or accomplishment in the financial aid profession. To receive the award, the individual should have made either an important single accomplishment or contribution or several significant accomplishments or contributions. Current members of the Executive Council are eligible for this award.

Sunshine is everywhere! I have never attended a CASFAA conference when Sunshine hasn’t been a part of the conference committee, a moderator, a presenter or working registration. Sunshine spends many evening and weekend hours devoted to CASFAA projects.

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Sunshine is the person who makes sure that all requests come together. She has been the treasurer, association services chair, president-elect for 2014 and has provided valuable historical input and guidance for the executive committee.

**Dr. Patricia Hurley - Creative Leadership**

The Creative Leadership Award is given to a CASFAA member who has demonstrated, through significant leadership, innovation in the profession.

During the past two years Dr. Hurley has been the “face” of financial aid re-engineering. She has led the way with town hall meetings to gather information for NASFAA regarding “how financial aid should work and look for the 21 Century”. Pat has been a member of the federal issues committee and provides guidance for the team going to NASFAA’s Leadership Conference. She represents California on the negotiated regulations teams and continues to support California’s financial aid professionals with advice, best practices, and regulatory guidance; she is a mentor for all financial aid professionals.

**Segmental Leadership Awards**

The Segmental Leadership Award is given to a CASFAA member in each of the higher education segments in recognition of outstanding leadership in the segment, CASFAA, or the financial aid profession. Current members of the Executive Council are not eligible for this award. These awardees are submitted by the CASFAA membership.

It is an honor to recognize the outstanding leadership within CASFAA for these three individuals. Thank you for your leadership within your segments as well as CASFAA. Linda Williams, your coordination with appointments for the California contingent to NASFAA’s leadership conference was invaluable. Lissa Wayne and Linda Bisesi, your contributions to the webinars and assistance with training proposals have been extraordinary – you both have provided information for segment specific topics.

- **California Community College – Linda Williams**
- **Proprietary Colleges – Lissa Wayne**
- **Graduate / Professional – Linda Bisesi**

**Thomas Le, Natasha Kobrinsky - Rookie of the Year**

Rookie of the Year Award is given to a new CASFAA member who is a new volunteer to CASFAA activities in recognition of the accomplishments and contributions to the association in the first year of being an association volunteer.

Thomas and Natasha took the lead this year and developed webinars that were pertinent to their segments. The webinars were a huge success and CASFAA members continue to log into the recorded versions. As segment representatives they were also members of the conference committee and assisted with the segmental conference sessions and pre-conference events.

**Committee of the Year – Federal Issues**

The Committee/Project of the Year Award is presented in recognition of the committee’s or project team’s outstanding contribution to the membership or to the profession. Committees chaired by a member of the Executive Council are eligible for this award.

**Chair – Daniel Reed, Vice President, Federal Issues**

Members:
- Angelina Arzate
- Melissa Moser
- Daniel Roddick
- Daniel Wait
- Louise Jones
- Natasha Kobrinsky
- Dr. Scott Cline
- Dr. Patricia Hurley
- Denise Pena
- Ja’Nelle Simpson
- Thomas Le
- Callie Woods
- Ena Hull
- Malina Chang
- Peggy Wellisch
- Vicki Shipley

**Daniel Reed, Deb Barker-Garcia - Special Recognition**

From time to time, individuals are identified whose personal efforts made a significant difference for CASFAA. The Special Recognition Award is given to an individual in recognition of that person’s dedication and service beyond the normal call of duty. Members of the current Executive Council are eligible for this award.

Deb you have produced and directed the second successful conference! I thank you for the renewed, invigorated formats for these conferences and can’t wait to see what you have coming for 2014! You have truly brought CASFAA members home for training and brought us together with your conference agendas.

Daniel your tireless efforts with federal issues this year provided information to our members in a timely, organized fashion. You and your committee produced the first co-facilitated webinar using resources from WASFAA and NASFAA.
Raising the bar
I have a fondness for recruitment and volunteer pursuit and I have a few thoughts on becoming a new volunteer. I shared stories in some recent articles. As a new volunteer, you have to first turn on the light
http://www.wasfaa.org/docs/newsletters/2013/Su-
merNewsletter.pdfpage8
learn to ride your bike
http://wfaa.org/docs/newsletters/2013/Fall2013.pdf page9
then, raise the bar.

My little French village was having a bicentennial and the event took place in the huge schoolyard behind my house. I grew up in Jesuit country where girls or most girls wore only dresses, no pants or shorts. I was nine, shy but curious and fairly adventurous so I made my way to the center of activities with no intention other than be right there. Twelve-year olds were being called to a high-jump contest and an old man insisted I get in line so I did. I can’t remember anyone else wearing a dress and I think all contestants were boys. In my mind, I wondered but not much about what was likely to happen with the dress and all but before I knew it, I had made the first, second, third and fourth rounds of raising the bar and remained alone. I can’t remember the prize just the shock of the unlikely win and my picture both legs over the tallest bar posted in the Bicentennial Commemorative Museum.

All volunteers are unique in temperament so there are countless ways in which dispositions incite them to make a difference. New volunteers are jumping into something new. They need a chance to use their talents in unique ways shaping the development of things around them in the organizations they serve.

Here are some examples of current WFAA volunteers with initiative, in their own words:

Why Volunteer?
With the constancy of change in our field, the training, networking and mentoring that WFAA provides is absolutely essential to our success as financial aid professionals. Our institutions and ultimately our students reap the benefits of our professional development. Membership is a true service-learning experience. 

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are able to exchange ideas and information with our colleagues...to take a pulse on how we’re doing and improve those critical thinking skills. We really do benefit from our membership.

I started my life in financial aid 17 years ago at Pacific University, a 4-year private/grad university just outside of Portland Oregon. Since then, I have experienced life at a community college, lender/servicer, proprietary school and now a 4-year/grad public university. I have been volunteering with WFAA for the last few years, serving on the strategic planning committee, chairing facilities for the conference back in 2010 and presenting sessions. I am also on the WASFAA Executive Council doing training, chairing the volunteer development committee and coordinating the newcomers’ welcome session for the annual conference.

**Abril Hunt**  
President-Elect 2013-14

My first experience becoming involved in leadership capacity of a professional organization was with the Washington State Association of Student Employment Administrators (WSASEA). It was a great learning experience and I developed important relationships. Getting to know others in the profession boosted my network of folks I could call on and enhanced my ability to find new solutions to problems. The positive experience led to my involvement in the National Student Employment Association (NSEA) and the Washington Financial Aid Association (WFAA) where the rewards continued. I encourage anyone who is considering a leadership position within a professional organization to jump in! Or perhaps tiptoe in by volunteering to be part of a committee or serving as a committee chair. Go for it!

**Jim DeWilde**  
WFAA Treasurer 2012-2014

I am grateful for Abril and Jim’s invaluable contributions to WFAA. Abril, in helping define the strategic plan for the next several years and Jim, for helping define investment goals for the organization. They are stellar volunteers raising the bar for others to jump and meet ever-new challenges.

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**OASFAA Report**

**Suzet Petersen**  
Oregon Institute of Technology

**Greetings from Oregon!**

We are preparing for our State Conference to be held in February at Salishan Resort, at Gleneden Beach, Oregon. Our conference committee has been working hard for a packed agenda with many options for attendees to choose from. The theme for the 2014 Conference is “Aidvengers Assemble”. The committee is full of energy and I expect this conference to be as great as it was last year.

Our Executive Council elections are being held in December 2013/January 2014. We will announce the changing of the guards at our Annual Conference in February.

During the month of January there will be a variety of locations hosting College Goal Oregon. My campus, Oregon Tech, will be a new site this year. We are hoping for a large turnout for this great event. For more information please visit [http://collegegoaloregon.gov/](http://collegegoaloregon.gov/)

The State Colleges are struggling with the new governance board, since the past governing board has dissolved and there will be new governance boards in the upcoming years. Some schools will have their own board, while others could possibly have a combined governance structure. We will see how it all takes shape in the next few months.

I hope everyone had a great holiday season!! Please be safe in the New Year 2014 and enjoy the New Year that will be upon us.
The conference committee is hard at work putting together a very exciting conference.

Justin Draeger, the NASFAA President and Craig Munier, the NASFAA National Chair will present sessions and provide an update on NASFAA. We will have numerous sessions to choose from, graduate and professional issues, Federal issues, personal development, default management, student loans, fraud, and best practices.

There will be sessions for all institution types and skill levels. The Silver Legacy Resort is now taking reservations. The contracted rate for Friday and Saturday night is $109 and Sunday and Monday night is $69.00 plus tax and fees. This rate includes free shuttle service to and from the airport and free guest room internet. This is an unbelievable price!! To reserve your room call the hotel at 800.687.8733. Make sure to use the group code WASFAA.

Registration will open in January. Take advantage of the early bird rates by registering at:

www.wasfaa.org

Subscribe to the WASFAA Water Cooler Blogs by visiting http://wasfaa.org/b/ and you will receive regular updates on sessions, registration and fun activities to do while you are in Reno.

See you in April!!
Volunteer: Helping Yourself While Helping WASFAA

We all have busy lives. It’s so easy to say that we can’t find time to volunteer. But I challenge you to just take a moment to consider the benefits of volunteering. The right match can help you network, learn new skills, and even advance your career.

The most obvious benefit of volunteering is the impact you make on WASFAA. Our association leadership is comprised entirely of unpaid volunteers. Volunteering allows us to connect with our colleagues in financial aid and work together to advocate for our students. Volunteering is a two-way street, and it benefits you just as much as it does WASFAA. Dedicating your time as a volunteer helps you learn new skills, and I’m not just talking about Roberts’ Rules of Order.

One of the best ways to make new contacts and strengthen existing relationships is to commit to a shared activity together. Volunteering is a great way to meet new people, especially if you are new to financial aid. Volunteering also exposes you to people with common interests. WASFAA President Frank Green and I both have Catahoula Leopard Dogs. Who’d a thought?!! It also provides you with professional resources, and fulfilling accomplishments.

It keeps the crazy away
Okay maybe that’s a bit of an exaggeration, but it does improve self-confidence, self-esteem, and overall life satisfaction. Helping others provides a natural sense of accomplishment. The better you feel about yourself, the more likely you are to have a positive view of your life and future goals, right? Volunteering actually does help against depression by keeping you in regular contact with others. Your support network is there for you when you’re going through challenging times.

Volunteering is especially beneficial for people over 40. Studies have found that people who volunteer have a lower mortality rate than those who do not. Volunteering has also been shown to lessen symptoms of chronic pain or heart disease.

It can move you up the career ladder
If you’re considering a career move, volunteering can help improve a specific skill set. But, even if you’re not planning on making a change, volunteering gives you the opportunity to practice teamwork, communication, problem solving, project planning, and organization. You’re more likely to stretch your wings at work once you’ve sharpened your skills in a volunteer position.

Just because volunteer work is unpaid doesn’t mean that you only learn basic skills. Many opportunities provide extensive training. For example, the training committee doesn’t just throw you to the wolves. They organize a three day “Train the Trainer” boot camp, so that you’re well prepared and never without a lifeline. The Annual Conference committee offers a wide range of opportunities ranging from graphic design, to publicity and arranging local logistics. And there is always someone on the committee who’s “Been there, done that”. Volunteering helps you build upon skills you already have but may not currently have an opportunity to apply. You will have a richer and more enjoyable volunteering experience if you first take some time to identify your goals and interests. Start by thinking about what you would enjoy doing. Opportunities that match both your goals and your interests will be both fun and fulfilling.

You get out what you put in
You’re donating your valuable time, so it’s important that you enjoy and benefit from your volunteering. It’s important to make sure that your volunteer position is a good fit. Ask questions. You want to make sure that this is the right fit for your skills, goals, and the time you want to spend. If you have any questions, be sure to speak up. Get with your Volunteer Coordinator (Hey, that’s me!) and ask about time commitment, if there’s any training involved, who you will be working with, and what to do if you have questions during your experience. You want to make sure you know what you’ve gotten yourself into. Maybe start small so that you don’t over-commit yourself at first. You want to have flexibility to change your focus if needed. So don’t be afraid to speak up if your experience isn’t what you expected. Why force yourself into a bad fit? Talk to the volunteer coordinator about changing your focus or consider looking for another match.

Remember to have fun
Most importantly, enjoy yourself! If you’re not, ask yourself why. Is it the work you’re doing? The people you’re working with? Or is it maybe just that the whole thing is new and unfamiliar? You need to pinpoint what’s bothering you before you can move forward.

Whether you realize it or not, people pay attention to what you do outside your work hours. Volunteering offers tangible proof of your commitment, dedication and interests. Show people what you are passionate about and maybe you will inspire them too!
The Jerry R. Sims Management and Leadership Institute was one huge success. The 2013 MLI was held in beautiful San Diego at the Handlery Hotel. We had 28 attendees, the largest number in the last 3 years representing members from five different states in the Western Region. WASFAA members from California held the lead at 17 attendees. Our attendees were introduced to the curriculum and the staff with the added benefit of receiving the NASFAA book; You’re the Director, a compilation of sage advice provided by very experienced financial aid administrators from around the country and NASFAA members. The book was used as one of the resources to develop the subject matter for the Institute. This year’s MLI was jam packed and our new WASFAA members were kept busy and involved to ensure they received information that was helpful and relevant to the profession.

Even meals were a learning experience for MLI attendee as they were instructed in the proper etiquette for a business luncheon and suggestions for conversation starters (a very beneficial experience especially when you are unfamiliar with the other attendees). A good conversationalist is a valued asset in a business environment. We also provided a brief showing of the proper work attire as well as inappropriate dress in the working environment.

Attendees were fortunate to have outside experts in Personnel issues and a speaker with experience counseling and providing services for at Risk Students. Their topics were so relevant and interesting that the attendees were sorry when their time allotment was done. Many put on their evaluations that the time was so well spent and wish they had more time available to these subject matters.

Bottom line, this WASFAA event was very successful, helpful and a winning venture that should be repeated (based on the evaluations of the attendees); so if you were not able to attend, plan on attending next year! Stay tuned to WASFAA communications where we will announce the dates and location of the WASFAA 2014 Jerry R. Sims Management and Leadership Institute.
From the Fiscal Planning Committee

Wendy Olson
Director, Whitworth University
Fiscal Planning Committee Chair

You would think that with all of us so focused on money so much of our lives, that it would be easy to make the Fiscal Planning Committee article to the membership on our activities very exciting and interesting, but alas I have nothing exciting to report. (A few fiscal gurus may still find this interesting; I thank you for that.) And, actually it is a good thing when the fiscal report of an organization is not exciting, because usually excitement in the world of investments and savings is not a good thing (although there are some bullish exceptions every now and then). “Gee, I have some news that may excite you to action today, we just lost one-third of our portfolio value,” is not an exciting message I would like to share.

Anyway, here is the latest on the fiscal situation for WASFAA. We last met on November 7 just prior to the WASFAA executive council meeting. Our treasurer, Mindy Bergeron, did not provide an exciting report for us, but she did provide some very positive information related to the fiscal wellbeing of WASFAA. It looks likely that we will be able to end this fiscal year without any reliance on our savings. Another way to say that is, we did not spend more that we brought in. WASFAA has been taking steps to keep our administrative costs down.

One step this year was Frank Green’s decision to have our first executive council meeting this summer be entirely be conference call.

Taxes are usually not an exciting topic either. Painful is a much better adjective. However, while getting them done for WASFAA can be time consuming and not much fun, they were less time consuming this year for our treasurer as we had an accountant assist with the process. Less painful and more accurate sounds like a win-win to me.

As financial aid administrators, we are blessed with some of the best colleagues. I don’t think you can find another field with professionals that are so gracious with their time, who are willing to share their experiences to make our entire association better at what we do. The opportunity to network, and the mentoring you receive, is priceless.

Thank you to Kay, Laura, Mary, and Tami for your generosity, care, and guidance. You are all wonderful teachers and true masters of your profession.

Management Leadership Institute

Frankie Everett
Associate Director of Financial Aid,
Marylhurst University, Oregon

I have attended the WASFAA annual conference and summer institute, but the one training I had not yet experienced was the Management Leadership Institute. With the generosity of the Ethnic Diversity Scholarship and some number crunching at my university, I was able to attend MLI in San Diego and I’m so glad I did. WASFAA has incredible members who provide the best training and are happy to share their experiences and advice to make everyone better at what they do. The MLI faculty had over 75 years of combined financial aid experience, yet they were all very humble in their knowledge and very easy to talk to.

The agenda was packed full of sessions that dug into all the components of being an effective manager and successful leader. We discussed budgeting, higher education models, working with supervisors and staff members, writing policies and procedure manuals, business ethics, and federal policies.

Not only was this training filled with useful tools and best practices, it was a fun and insightful opportunity to dig into the details of things such as etiquette, professionalism, and communication. Every single session was absolutely relevant and helpful for any aspiring supervisor or director.

As financial aid administrators, we are blessed with some of the best colleagues. I don’t think you can find another field with professionals that are so gracious with their time, who are willing to share their experiences to make our entire association better at what we do. The opportunity to network, and the mentoring you receive, is priceless.

Thank you to Kay, Laura, Mary, and Tami for your generosity, care, and guidance. You are all wonderful teachers and true masters of your profession.
Graduate/Professional Segment...What Do You Think?

Catherine King-Todd
Thunderbird School of
Global Management Medicine

The WASFAA Graduate/Professional Issues Committee is looking for feedback & input. We are working on a shopping sheet for graduate/professional students based on the potential that the Department of Education will be opening this up to our students.

Also, do you have anything on your mind that you would like us to consider from a regulatory standpoint? We work with the Federal Relations Committee in bringing forth these issues.

Please contact anyone of one of your GPIC committee members with your thoughts & comments – we need to hear from you!

Thanks!

Catherine King-Todd, Chair
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Thunderbird School of Global Management

Ana Borjas
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Southwest College of Naturopathic Medicine

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Seattle University

Nominations and Elections Update

Jack Edwards
Director of Financial Aid
at the Graduate School
Stanford University

As Chair of the Nominations and Elections Committee I had the pleasure to work with colleagues from all over our region to put together a slate of candidates to run for the officer positions on the 2014-15 Executive Council. While this task can be daunting (sometimes it requires the twisting of arms) in finding members to volunteer and agree to run for President Elect, Vice President, Treasurer Elect, Secretary, Rep at Large for Ethnic Diversity, I have to say it was an enjoyable experience.

I want to thank all of the WASFAA members who either nominated themselves (good for you) or sought out others and nominated a colleague for the various positions. WASFAA is all about its members. Remember or mission:

The Western Association of Student Financial Aid Administrators is a professional organization of individuals in the western region of the United States who administer or advance access and choice to higher education through the administration of student financial assistance programs. WASFAA’s mission is to promote student financial aid and educational opportunities for students by providing personal and professional development to its members.

Each of us as a member has a voice in how we achieve our mission, one of which is through the election of officers or our association leadership. Thank you all for taking time to vote. Congratulations to all of the elected officers. I know you will represent WASFAA well and keep our association strong.

Barbara Bickett, President Elect
Tracey Lehman, Vice President
Mindy Bergeron, Treasurer Elect
Ashley Munro, Secretary
Oscar Verduzco, Representative at Large, Ethnic Diversity

Lastly I would like to express my extreme gratitude to the Nominations and Elections Committee; Kathy Campbell, Frank Green, Kevin Jensen, Catherine King-Todd, Phong Moua, Ashley Salisbury, and Kay Soltis. You guys rocked the vote.
So You Want to be a Director?

Doug Severs
Financial Aid Director
Oregon State University

One of the metaphors that I think of in regard to being a financial aid director is one of it being a ship’s captain in a fleet of ships. A ship’s captain works with a crew to prepare the ship the voyage and works with the other ships to coordinate the sailing. During the voyage you may run into hurricanes or icebergs or in financial aid terms a computer system breakdown! In this fleet you must work together to get all to the destination and the ships have different functions to support each other. Much like financial aid supports admissions or student accounts or housing. You take this voyage and reach the destination hopefully without stormy seas. For financial aid our destination is the beginning of our award period and after that we start preparing our ship for the next academic year voyage. Sometimes I think we get too focused on our processes and don’t fully consider how important our functions are to other areas. So, if you are planning any major shift in your processes make sure you consider how it may impact your fellow fleet members. You don’t want to get your admissions or student accounts in tizzy because you changed something they depended upon.

For fun and to see if there are folks out there reading this column please send me what other metaphors that you think fit being a director of financial aid. Send it to doug.severs@oregonstate.edu. For the person who provides the first metaphor I will provide a $10 Starbucks Gift Card. Of course employees of WASFAA and their family members cannot compete in the contest. I will publish a list of metaphors in the next newsletter.

Speaking of ships in the fleet, I was asked a few months ago to be the chair of the search committee for one of the big ships in the OSU fleet. It is for our director of housing. I had not chaired such a high level search and wanted to help. It was interesting and I learned a lot about the challenges of being a housing director. Some of the housing folk wondered why someone who is not a part of housing was the committee chair and introduced the candidates at an open forum. I explained to them that it was not a housing hire, but a university hire. This is especially true of a director where she/he needs to work with many areas of the university. We are all intertwined in the function of higher education and sometimes we forget this.

Part of the Fleet

Jace Salisbury

TRANSITIONS

Carmen Dominguez has joined American Student Assistance as a Regional Account Executive. Carmen will serve schools in AZ, NV, CO, NM, Southern California and HI. She can be reached at 602-904-2710 or cdominguez@asa.org.

Ashley Salsibury (Reno, NV) has graduated with her Masters of Science in Equity and Diversity in Education. She and her husband Jon welcomed their first child, Jace, on December 1st.

Pacific University has had two recent personnel changes. Joanne Leijon was promoted from Customer Service Specialist to Financial Aid Counselor/Information Coordinator. Her promotion left a vacancy in the then renamed Customer Service Specialist/Office Coordinator position that was filled by new staff member Travis Powers.

Angie Mitchell has accepted the Loan Technician position at the University of Alaska Fairbanks. She recently moved to Fairbanks from Kansas and enjoyed her first -30 degree day recently.
Getting to know Fielding Graduate University & Director, Financial Aid & Scholarships

Lillian Simmons
Fielding Graduate University

In my work at a private, non-profit, distance learning, graduate-only institution, I have been continuously appreciative of the Graduate and Professional Issues Committee (GPIC) network within the NASFAA and WASFAA communities. The advocacy and support of the graduate/professional community is exceptional in the way that it finds common ground in the midst of the diversity, and most importantly, helps to minimize the professional isolation that can so easily occur within small financial aid offices. To that end, I’ve pulled together three misnomers about my students’ financial outlook which are being addressed through the GPIC advocacy efforts:

**Graduate students don’t have financial need**
Fielding Graduate University enrolls a population of working-adults seeking advanced degrees in the areas of clinical psychology, media psychology, human development, organizational leadership/development, and educational leadership. Fielding students range in age from 22 – 78, with a median age of 46. Although many are working full time while in school, they are juggling financial challenges in their personal life, such as their children entering college, and they or their parents experiencing significant health problems. The elimination of subsidized loans and the increases in loan origination fees, particularly for the Graduate PLUS loans, have hit hard for these students. University leaders have been working to increase the visibility, equitability, and quantity of our scholarship programs through the implementation of a single scholarship application for all students, as well as engaging in practices that encourage students to minimize their loan debt. Additionally, the advocacy efforts to remove loan origination fees, separate the Graduate PLUS program from Parent PLUS, and increase Stafford annual and lifetime limits would provide some welcome relief.

**Graduate students understand budgeting and finances**
Fielding’s scholar-practitioner learning model uses independent study, online, and face-to-face components for each program, and we do not have a traditional campus setting. Approximately 67% of our students utilize federal student loans as their primary form of financial aid. Although many have experience with federal loans from their undergraduate programs, as well as household budgeting as an independent adult, the transition back into school as a borrower is a significant financial adjustment. To accommodate the need for financial aid advisement when students can’t just drop in with questions, we travel to the face-to-face conference events for personal advising sessions, schedule phone call appointments, and utilize web-based video conferencing to provide financial aid information. Email messages have to be clear, short, and prompt, while also keeping in mind that sometimes we just need to pick up the phone. The advocacy efforts to increase visibility of NSLDS aggregate loan balances through studentaid.gov and studentloans.gov, as well as aligning how servicers handle interest capitalization and forbearances have helped significantly in supporting financial literacy.

**Graduate students all choose lucrative career paths**
Fielding’s mission is strongly rooted in a commitment to social justice, with many of our graduates choosing to continue careers in public service and non-profit sectors. Additionally, some graduates have pursued their degree in order to make a career transition, which may require some time to grow a new private practice or consulting business. We encourage students to limit their PLUS borrowing by providing a monthly tuition payment plan option, and we encourage student awareness of their borrowing levels by asking them to request a loan amount rather than automatically packaging the maximum cost of attendance. University leaders have been making changes systemically to encourage timely completion, thereby reducing the overall cost of the program. Like many graduate schools, our cohort default rate is low, but maintaining flexible repayment options for graduate students is necessary to allow them to responsibly manage their debt. The advocacy efforts to keep the public service loan forgiveness program are essential to encourage and support students who are choosing to use their graduate-level skills in a less lucrative career.

I look forward to the next year working with my WASFAA GPIC colleagues to continue the support of graduate and professional students and the financial aid professionals who serve them.
An Inside Look at Negotiated Rulemaking

Kevin Jensen
Director of Financial Aid
College of Western Idaho

Negotiated Rulemaking – what on earth is that exactly?! Excellent question! Our day-to-day financial aid lives are filled with packaging, verifications, budgets, helping students, and all kinds of other activities, most of which are connected to rules, laws or regulations. We also spend a lot of time working to understand those rules and frankly, it’s difficult to understand why some of them are the way they are!

In the past few months, my eyes have been opened! Specifically, I’ve been privileged to be a primary negotiator in the gainful employment negotiated rulemaking sessions where I’ve witnessed first-hand the interesting and complex way the regulations we work with every day are shaped.

Over the course of several months, my fellow negotiators and I worked very hard to understand the draft rules issued by ED, focusing keenly on the impact to students and schools. During the public sessions - which were attended by members of the higher-ed media, data analysts, representatives from think tanks, Congressional staffers, and for a portion of one session, even a US Congressman – we debated, postured, and compromised as we worked toward consensus. I must admit, it was at times a bit unnerving to know that every word I spoke could end up as a quote in a higher-ed trade publication or blog!

The work was very complex and required a lot of extra emails, phone calls, and outside of work meetings. At times it was exhausting but the work being done and the conversations we were having with ED were good. As a newcomer, I had expected there to be some sharp and stubborn divides between negotiators representing different constituencies within higher ed. What I found was an impressive collection of passionate professionals eager to tackle the difficult work, to the very last person. We came from all walks of life, all manner of professions, and all areas of the country.

Ultimately, at the conclusion of three sessions and countless hours of behind the scenes work, the committee did not reach consensus. This means ED is free to craft the rules in whatever manner they see fit and should issue interim final rules for public comment next spring.

While we have a number of experienced negotiators in the WASFAA region, this was my first experience with NegReg and it was quite the experience! As a “rookie”, I didn’t really know what to expect . . . Truly, I didn’t know what I had gotten myself into!

Thankfully – and for this I am extremely grateful and very proud – we are part of an amazing community of professionals who care deeply for our colleagues, students, and institutions. I quickly realized that I had a lot of support from WASFAA members and others who were willing to share their experiences and help get me up to speed on what to expect. If you haven’t had the opportunity to be involved in Negotiated Rulemaking yet – don’t be shy! I promise, it will be an experience of a lifetime and I also promise that you will have the same support from your WASFAA family as I did. Now that I’m no longer a rookie, I hope I’ll be the one to support you in your rookie season!

At a meeting of the Committee on Financial Aid on March 10, 1966, a proposal for a Western Regional Assembly was made to form an association for financial aid officers.

A meeting to discuss the pro and cons of forming an association was held in Reno, Nevada in December of 1967.

On January 13, 1969 in the Continental Ballroom #6 of the San Francisco Hilton WASFAA was created.

The first membership dues for WASFAA was $10, with half of that going to NASFAA.

The first President of WASFAA was William Baker from University of Washington.

More WASFAA presidents have lived in California than any other state.

Random Trivia
Smart Banking Can Help Your Students Achieve Financial Success

Sun Ow
Senior Marketing Associate
Great Lakes Educational Loan Services, Inc.

Often, students are in a position where they need to select a financial institution in which they can manage their everyday finances. With so many options, it can be hard for them to decide on a financial institution that actually fits their needs; it’s often easier to get set up with the most readily available institution that might not always be the best option. The following are some tips you can offer students on how to assess their own finances in order to choose the right financial institution for their needs.

Do Research

- **Know Personal Finances**
  One of the most important things to maintaining healthy finances is to know personal finances inside and out. It sounds simple, but there are a lot of intricacies to finances and knowing current state as well as future planning can help in making the best decisions along the way.

- **Know Expectations of a Financial Institution**
  What’s needed? A simple checking account or an account that involves much more opportunities (e.g., investing)? Financial institutions offer many services, so it’s important to know exactly what is needed now - and in the future - to take full advantage of each.

- **Ask Questions**
  One of the worst things students can do is pick the first financial institution they come across. It’s important to choose an institution that can do everything they want it to, at the least cost. The easiest way to know that is by talking to someone at the institution to ensure all questions are answered.

- **Beware of Fees**
  Be aware of institutions’ fees. Many financial institutions have fees that aren’t always immediately obvious. For example, many banks charge customers fees for using other companies’ ATMs, which is a fairly obvious fee. But they might also charge a fee for accepting the fee to use the other company’s ATM, ultimately charging two fees on one transaction. It’s important to always take the time to read the fine print of any agreement.

Select a Financial Institution

While a standard bank might be the right choice for some, they are not the only financial institutions available. Credit unions offer most banking-type services, as well. They’re usually nonprofit, member-owned organizations whose members have a vested interest in the company. This means they’re often able to offer higher interest rates for customers’ applicable accounts than banks can offer. However, it may be less convenient to find an ATM if you bank through a credit union versus at a well-known bank. Regardless of the institution, first consider every service they offer - or don’t offer.

Financial Management Tips

**Managing Finances**

Selecting a financial institution is just one step toward achieving healthy finances; there are additional steps to help manage finances. Whether by hand or online, keeping track of all transactions is important. Budgets are a great way to manage money while also keeping a close eye on general spending. Some people prefer to balance a checkbook or to do all maintenance online if their financial institution has an online banking system. Controlling all banking online is very convenient, especially via a mobile device if the financial institution has a mobile app and banking can be done anywhere and at any time.

**Saving Money**

Most financial institutions offer some sort of saving system, whether it’s a savings account with regular contributions or something like a certificate of deposit (CD), which is a longer-term investment. Budgeting is another great way to plan for saving money as it allows for planning it into regular monthly finances. It’s usually recommended to set aside around 10 percent of monthly income for savings, if possible.

**Financial Safety**

Whether tracking all finances manually or online, it’s always important to keep personal financial information safe. Financial institutions generally have many different types of security in place, but each person is their own best protection. It’s always a good idea to shred paper documents that are no longer needed, keep records of those that are needed in a safe location, and change online passwords often, ensuring they’re as secure as possible.

There are 5 standing committees named in the WASFAA bylaws: Bylaws, Ethnic Diversity Action, Executive, Nominations and Elections and Strategic Planning.

Random Trivia
Alternate Verification Documentation Acceptable for Rest of 2013-14

Dianne Fulmer
USA Funds Account Executive

For the remainder of the 2013-2014 award year, alternate documentation is acceptable for certain tax filers selected for verification.

In a recent Electronic Announcement, the U.S. Department of Education indicated that, for aid applicants who unsuccessfully attempted to obtain a tax transcript, you may accept the following verification documentation instead:

1. A signed copy of the applicable 2012 tax return (1040, 1040A or 1040EZ), and one of the following:
   - If the tax transcript was requested via paper process (Form 4506T-EZ or 4506-T), a copy of the Internal Revenue Service response that the transcript could not be provided, signed by the tax filer.
   - If you do not doubt the information listed on the tax return, complete the verification process and retain — but do not submit – the IRS form.
   - If you have doubts about the accuracy of the listed information, you must mail the IRS form. Federal policy does not permit a school to complete verification until a transcript is received, or until the IRS confirms that a transcript is not available.

The Department’s guidance regarding alternate documentation for to 2013-2014 refers only to verification that occurs on or after the date of the announcement, Oct. 23, 2013.

Carissa Uhlman
Inceptia Vice President of Student Success

Tips for Using Analytics

In a time when colleges and universities are being asked to do more with less, it can often be difficult to garner support for new programs and initiatives. Additionally, established programs can face tough scrutiny and may have to produce evidence of a significant return on investment to continue to operate. In either situation, whether you are proposing the implementation of a financial literacy program for your school, or you already have one in place, analytics can help you make the case for why no school should go without. Here are a few suggestions to help you make the numbers work for you.

1. Identify Your At-Risk Students
   If you have not already, you should determine the risk factors that undermine student success at your institution. With the current focus on retention, many schools have already called upon their academic, financial aid, and enrollment management departments to culminate this data and determine what characteristics define “at-risk” for them. Will it be enrollment status? Academic level? Borrowing history? These factors will play a key role in deciding the most effective method and time to deploy your financial literacy program, and to whom.

2. Establish a Baseline
   With an outcomes-based approach in mind, you need to determine what level of financial knowledge your students have before program participation. After all, the best way to know how far you have come is to figure out where you started! The most effective way to truly gauge existing knowledge is to have program participants complete a pre-assessment that encompasses the key points you will be covering in your program.

Determine Knowledge Gain
As students progress through your program, there should be “temperature checks” along the way to keep them engaged and apply what they are learning. For instance, a student who completes a budgeting course may have to create and submit a sample budget before she can move on; a student who attended a workshop on credit cards may have to submit a summary report to his instructor or program facilitator. Additionally, and most analytically, administering quizzes at each checkpoint can further reinforce knowledge gain for a particular topic. And of course, a final post-assessment at the program’s completion should be compared to the pre-assessment results to provide hard data regarding the efficacy of your program.

Track Your Return On Investment
It may be tempting to stop gathering data at this point, but there is still so much more to be gained from ongoing analytics! Continue to survey your program participants at predetermined intervals to assess changes in financial behavior. Work with your financial aid office to examine borrowing habits before and after exposure to financial education. Finally, track your participants’ retention, graduation and cohort default rates to determine if your efforts have impacted any of these critical areas. Capturing this data will require a good deal of time and effort, but will be worth its weight in gold if it lends support to your financial literacy program.
WASFAA Conference 2014

Join us in the “Biggest Little City in the World”

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

Make plans to join hundreds of your colleagues in Reno!

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

See you in Reno, Nevada   April 13-15, 2014   Silver Legacy Resort
Student requests, dealing with uneven costs across terms, a student’s scheduled completion of a program — all are reasons you might be required or choose to originate a Direct Loan for a single term only. Single-term loans come with some rule variations, however, and USA Funds Ask PolicySM has received a number of questions on the topic.

Here are answers to some of your most frequently asked questions:

If a student requests the full annual loan limit for a single payment period, is the school required to originate the loan for that abbreviated period?

Yes. If the student requests the full annual loan limit for a single term and is otherwise eligible, the school must process the single-term loan.

When calculating the student’s single-term loan amount, use the cost of attendance, estimated financial assistance and alternate expected family contribution for the single payment period only. Note that using these reduced amounts may mean that some students are not eligible for the full annual loan limit for the abbreviated period.

Are there any scenarios in which a school can originate the loan for less than the student’s eligibility or for a lesser amount than the student requests?

You cannot arbitrarily choose to originate only a portion of a student’s eligible amount for the single term. You also may not establish across-the-board policies to limit the amount of loan funds your school originates for students who request a loan for only a single term.

The only time a school may originate less than the student requests or is otherwise eligible to receive is through the use professional judgment on a case-by-case basis. In those cases, you must notify the student of the reason that you originated less than the student’s full loan eligibility. Federal law and federal policy explicitly prohibit any type of systematic limitation to the loan amount or to general loan eligibility.

Are there other rules related to originating a loan for a student who is completing a program in the single term?

Yes. Those rules apply when a student is an undergraduate who is completing a program in a single term (which likely is less than the school’s established academic year). In that case, you must prorate the loan amount based on established loan proration requirements.

Loan proration is required in two instances. And they are the only scenarios in which proration is permitted:

- When a student is enrolled in a program that is shorter than an academic year.
- When a student is enrolled in a program that is at least one academic year in length but is completing the program in a period that is less than an academic year.

USA Funds® loan proration fact sheet offers more information. You can download the fact sheet from the Resource Library on the USA Funds website.

If a student’s per-term costs are unequal, can the school schedule uneven disbursements of the same loan?

No. Initially you must schedule all Direct Stafford and PLUS loans for substantially equal disbursements on a payment period basis.

There are instances when a school subsequently may need to update disbursement amounts to be uneven, such as when the student advances to a new grade level during the academic year. But if you know the per-term costs are uneven prior to originating the loan, you may choose to originate separate loans on a term-specific basis.

For example, if the student’s costs are higher during the fall term, you could originate one loan for the fall term using the fall-only COA, EFA and alternate EFC. Then you could originate a separate loan for the spring term only, using the lower costs attributable only to that payment period. You must disburse the separate fall and spring loans in multiple, substantially equal amounts during each of those payment periods unless your school is exempt from the requirement due to a low cohort default rate.

You must ensure that the sum of any Stafford loans disbursed during the academic year does not exceed the student’s applicable annual loan limits.
Performance-Based Rankings to Affect Higher Education Planning

Ted Lannan
Inceptia Director of Market Research

This month the Department of Education will conduct public forums on college campuses across the country to discuss a possible federal college rating system that will determine student aid awards.

Many states today have already reconsidered the enrollment-based funding model and instead are allocating money to colleges and universities based on the number of students who complete courses and degrees.

According to a report released last month by the National Center for Higher Education Management Systems (NCHEMS) and Complete College America, 16 states have a funding formula in place—that’s four additional states since February 2013.

The funding formulas are based on performance indicators like course completion, time to degree, transfer rates, the number of degrees awarded, or the number of low-income and minority graduates. This illustration [see map] shows states that are already transitioning to some type of performance funding or are considering it.

Ten additional states are transitioning to some type of performance funding and more states have started the process with formal hearings held at the Legislature or meetings conducted by governing boards.

Based on these changes, higher education institutions must focus on student success and retention to generate an acceptable rate of return and maintain financial viability.

The starting point is analytics. My favorite business quote from Peter Drucker is: “What gets measured gets managed.” Instinct will only go so far; schools will need to quantify the size of the problem to convince others to take action.

Today, higher education institutions are collecting more data than ever before. However, much of the data is being used to satisfy credentialing or reporting requirements rather than to address strategic planning questions. Much of the data collected are not used at all. The problem is not the amount of data, but the challenge of integrating it, and the time and expertise to analyze it.

That’s where professional analysis can help.

Analytics:
- provides evaluation of data to determine patterns unique to each school
- helps mine and integrate vast amounts of information not normally connected
- offers a predictive view of upcoming challenges
- makes available a means to efficiently use available resources

Data should be used to identify the variables in student success. It’s not just about recording the data, but rather using the data to tell a story—a story that identifies trends and develops new ideas to help students be more successful at your institution.

At a time when our government will require more justification when credentialing and ranking an institution, the objective must be to use data analysis to promote retention, improve graduation rates and enhance loan repayment.

States implementing some form of performance-based funding

Source: October 2013 Report by NCHEMS and Complete College America

Ted Lannan
Inceptia Director of Market Research

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At a time when our government will require more justification when credentialing and ranking an institution, the objective must be to use data analysis to promote retention, improve graduation rates and enhance loan repayment.
KEVIN STRUCKHOFF
TG Assistant Vice President for
Relationship Management and Consulting

On December 13, 2013, the U.S. Department of Education (ED) announced that it will recognize the marriages of same-sex couples for the purposes of determining and distributing federal financial aid, and offered specifics on how this policy change would affect the financial aid application process.

The policy changes, described in Dear Colleague Letter (DCL) GEN-13-25, provide guidance on how the Supreme Court’s June 2013 decision in United States v. Windsor (Windsor) affects federal student aid.

The letter explains that prior to the Windsor ruling, Section 3 of the Defense of Marriage Act (DOMA) prohibited all federal agencies from recognizing same-sex marriages for the purposes of federal programs, including student financial assistance programs. The Windsor ruling declared Section 3 of DOMA unconstitutional on the grounds that it violated principles of due process and equal protection.

Since federal agencies must now recognize same-sex marriage, ED detailed relevant changes to the Free Application for Federal Student Aid (FAFSA) and the corresponding expected family contribution (EFC) calculation.

Key changes
Here’s a rundown of the most significant details of ED’s announcement:

• A student or parent is considered married if he or she was legally married in any domestic or foreign jurisdiction that recognizes the relationship as a valid marriage, regardless of where the couple resides, or where the student attends school.

• Legally married same-sex couples will be treated as married for all FAFSA and EFC calculations.

• As of the date of the DCL, first-time 2013–2014 FAFSA applicants (and parents, if applicable) are expected to respond to all questions related to the marital status of the student and parents without regard to whether the marriage is between persons of the same or opposite sex.

• For a student who previously submitted the 2013–2014 FAFSA, but who was unable to respond to marital status questions as “married” due to Section 3 of DOMA, he or she may choose to submit a correction to the FAFSA-reported marital status information. This is also applicable to the parents of a dependent student who are in a same-sex marriage. In these cases, the school must approve the student’s request, recalculate the EFC, and revise the award as applicable.

• For a student whose marital status changed after submitting the initial FAFSA, the student may request a change; however, the school has the discretion as to whether they will approve the request (as under current rules).

• For the 2014–2015 FAFSA and subsequent years, all applicant responses related to the marital status of the student, and parents if applicable, must be in accordance with the guidance in the letter.

• ED acknowledges that the instructions on the paper FAFSA are no longer accurate; therefore schools may want to refer students to the revised instructions on the studentaid.gov website. Changes to the 2014–2015 FAFSA on the Web are currently being made and will include the use of gender-neutral terminology such as “Parent 1, Stepparent 1” and “Parent 2, Stepparent 2.”

Additional information
Schools should review the DCL for full details about these changes. For questions about the letter, schools may contact FSA’s Research and Customer Care Center at (800) 433-7327. ED may also issue future guidance regarding changes related to DOMA and the FAFSA, as well as guidance concerning other impacted Title IV provisions given the broad nature of the DOMA ruling.