President’s Letter  
Jim White, WASFAA President

Can you believe that fall term is over? As we head toward the holidays, I look back over a very full fall. I was pleased to attend the Idaho, Washington, Nevada, and California annual conferences. It was wonderful to visit each state, to see many long-time friends, and get a chance to meet many new friends. As a NASFAA Board member I attended the MASFAA conference in Indianapolis. And the NASFAA Board met in early November in New York City. I am very grateful for this opportunity to serve WASFAA as I have had many wonderful experiences.

WASFAA’s fall training was very successful thanks to the hard work of the training committee. The Sims MLI was in Glendale, Arizona in November and I understand that it was a great training event. Thanks to the committee who worked on making that a memorable institute.

If you have not recently visited WASFAA’s website it is time to stop by for a visit. Our new job bank can help you hire folks for your office or help you find a new job. The annual conference registration is also up and running. There is so much more for you to see and use, so stop by.

Make plans now to come or send your staff to the Summer Institute which will be held in June 2005 in Reno, NV. Jack Millis and the committee are working hard to make this a fine summer institute.

As I wrap up the fall and the holidays approach, I wish you all find a moment of peace and rest. Life seems to be so very busy; I hope you all create an opportunity to enjoy loved ones and take care of yourselves.

Summer Institute 2005  
June 2005  
Reno, NV
2005 WASFAA Annual Conference
By Tracy Reisinger, Chair 2005 WASFAA Annual Conference

The 2005 WASFAA Annual Conference will be held in the beautiful “City of Roses” Portland, Oregon, April 17-19, 2005. Online registration is now up and running at the WASFAA website at www.wasfaa.org. To access the information just click on the Conference tab to the left of the screen and then on the registration link. Agenda information is also available at the site. The general agenda timeline is posted as well as the session topics. We are thrilled to have best selling author and motivational speaker Dr. Bertice Berry as our welcoming keynote speaker, and Patrick Dunning presenting “The Signature Project” as our lunch speaker.

The conference committee is also sponsoring a visit Sunday night to the Classical Chinese Gardens, and plans dinner and a “Rose Festival Carnival” for Monday night at the conference. In addition, the Saturday prior to the conference will be a special “Training of the Trainers” type workshop, put on by the WASFAA Training committee and offering training to develop future WASFAA leaders and trainers. Information on this workshop will be available shortly.

For the first time WASFAA is able to accept payment via credit card. Costs for the conference are as follows (2005-2006 WASFAA dues will automatically be added to your registration fee if they have not already been paid: see below pricing).

The conference hotel is the Lloyd Center Doubletree. The conference rate is $112/night + tax for an estimated total of $126/night with tax. There is a link to the hotel at the website or you can make reservations by going to www.doubletree.com. The group/convention code = WAS to get the conference rate.

The conference committee will be collecting books for the “Books for Kids” program sponsored by Willamette Writers. You can access their website at http://www.willamettewriters.com/books-for-kids.htm. The Books for Kids program is administered by Willamette Writers, Inc., a non-profit, tax-exempt Oregon corporation led by volunteers. The program’s goal is to encourage and support literacy by providing books, free of charge, to disadvantaged children and teenagers through regional social service agencies and organizations. In 2003, the program donated more than 16,000 new and used books to almost 50 agencies and organizations in Oregon and southwest Washington. The Books for Kids program strives to encourage and support literacy by providing appropriate books to as many disadvantaged young people as possible because many times a book may be the only friend a kid has.

So be prepared to bring a book or purchase one while you are at the conference to donate to the Books for Kids program. This could be your excuse to visit the famous Powells Bookstore in downtown Portland!

The entire Annual Conference Committee welcomes you to visit the beautiful city of Portland and attend this wonderful training and networking opportunity. I hope to see you all there!

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U.S. Bank partners with USA Funds® because they help us accomplish our objectives by providing cutting-edge products, services and the latest in technology. We rely on USA Funds to help us achieve our goals. At U.S. Bank, we offer a five-star service guarantee to our customers. Customer satisfaction always has been important to USA Funds, which reflects U.S Bank’s own priority of providing excellent customer service.

USA Funds has a very clear vision and purpose. Their many initiatives, including programs on early awareness, financial literacy and scholarships, display their commitment to helping students prepare for the future. I believe our great partnership with USA Funds paves the way for students to achieve their educational goals.

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Jerry R. Sims Management & Leadership Institute
By Mike Johnson & Catherine King-Todd, Co-Chairs

This year’s Jerry R. Sims Management & Leadership Institute was a raving success with 25 phenomenal participants! Each state was represented making for a terrific opportunity to get to know members from around the region, share information and ask for advice from the group.

Our goal was to provide advanced training to, and facilitate networking opportunities for, members interested in becoming more effective managers and leaders in their offices, on their campuses, and in professional organizations. Based on comments from those in attendance we believe that we met our goal. We asked participants to share their thoughts throughout the Institute in a phrase…

- Wow! Everyone arrived in Phoenix where the sky was blue with white, fluffy clouds.
- We all wear different hats in financial aid and that was reflected in the hats we wore Sunday night. What a wonderful show of diversity!
- …and then it rained, and rained, and rained.
- While it rained outside, there was lots of heat and light in the meeting rooms.
- What a wonderful time I had working with and meeting the great, enthusiastic, friendly, and intelligent faculty and students.
- An amazing group of individuals and financial aid administrators dedicated to the profession and their students.
- To serve the student, is to enable the student.
- Raindrops kept falling on our heads…
- We all wanted to stay in bed. But we went to class…
- Great discussion and participation.
- So many perspectives…
- Compliance, compliance, compliance – network, network, network!
- Sunday brought an unscheduled session in problem solving and professional judgment, which ended in successful completion of Escape 101.
- Thanks for the memories! Great group – outstanding facilitators.
- The campus is centrally located and a leisurely stroll from the Arrowhead Mall. (Author’s note: if one considers 4-5 miles a leisurely stroll!)
- Rick Weems got bored and started throwing paper airplanes.
- We came to the land of the sun to find out how things are done.
- Everyone shared, everyone cared.
- The staff did their part…and we all left very smart!
- It became apparent that financial aid professionals are people who are problem solvers, maze negotiators, and advocates.
- The only time the room became quiet was when the discussion was on a Policies & Procedures manual.

We were fortunate to have the NASFAA National Chair-Elect, Dave Gelinas (aka Sheriff Dave) as our opening speaker conveying his thoughts on “Managing & Leading in a Time of Change.” He stayed with us for the entire Institute and was a wonderful contributor.

We wish to send out a special thanks to the faculty: Kathy Campbell, Dave Gelinas, Doug Severs, Genevieve Watson & Rick Weems - and all the participants for making this event a great experience for us. We look forward to seeing all of you throughout the region at various WASFAA activities and in leadership positions.
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The website continues to be a hotbed of activity. On average about 120 users visit the website per day.

June 2004

July 2004

August 2004
Notice in October the number of hits on the site peaked slightly over 14,000 for one day – Fall Training.

September 2004

October 2004

November 2004
By Tami Sato, WASFAA Federal Issues Chair

Dallas Martin, NASFAA President, spoke at the recent CASFAA Conference and stated that the association is very hopeful that Reauthorization will be finalized before the big elections, for doing so would give candidates the opportunity to say, “see what we have done.” Progress has been made with a few bills passed and a draft of the major bill completed but, alas, bipartisan difference prevented passage of a final reauthorization bill.

What happens now? All the bills will have to be reintroduced, reconsidered and passed. Dallas does not believe the climate has improved for the following reasons:

- President Bush has many other policy priorities including cutting the deficit in half during the next four years.
- Student assistance for college students is not at the forefront.
- There are new players including a new Secretary of Education. Margaret Spelling hopes to further the agenda of the No Child Left Behind Program for 3rd to 8th graders. (Note: This is a $25.5 billion program.)
- There are many leadership unknowns in the Senate but more stability in the House with Boehner, Miller, Gregg and McKeon keeping their positions.
- Major splits on opinion remain on private versus for-profit institution policies and definitions and the differences in the FFELP and DSL programs. NASFAA believes schools should continue to be able to choose which program they want to participate in and that both programs should be equal.

College costs will continue to be an issue and it is an easy target for politicians. Dallas feels we need to remind legislators of the long-term cost to society if people don’t go to college. More transparency is needed for parents and students who get confused about tuition discounting and other factors used to make college choices.

The 109th Congress reconvenes in February and the House is expected to reintroduce H.R. 4283 and the other four bills in one single bill. The questions remain on whether sections will be modified or what will be taken out.

It is not clear what time and energy will be put in the reauthorization of the Higher Education Act and for this reason some folks are saying the process may be carried on to 2006 or even 2007. Pat Hurley from Glendale College is serving on the NASFAA Reauthorization Taskforce which has become the longest running taskforce in NASFAA history. Dallas drew on the CSFAA conference theme which was “Don’t Stop Believing.” He emphasized that although we know there will be a squeeze on domestic spending (homeland security, the Iraq war and even the hurricanes in Southern states), we must continue to make sure our legislators know that students need federal assistance and support in order to continue pursuing higher education.
People Updates/Spotlight

Just a few comments from first-time conference participants and scholarship winners:

“Every year NAFAA and its Annual Conference grows bigger and better. This year was no exception. There were some great presenters and lots of new ideas and thoughts of current processes going on for me. The updates on R2T4 and the upcoming changes to the FAFSA on the Web still a lot of ideas for me in my job. The fraud prevention presentation was well received and is something I have been thinking about a lot. Always great to see good friends and start some new ideas. Thanks to the Conference Committee for a great conference and the Scholarship Committee for allowing me to continue to be a part of the process.” ~ Paige Hurley

“It was my first time attending a financial aid conference and it was great to see the different people involved in the small world of financial aid at all levels. From the lenders to the financial aid administrators and government representatives, it is great to experience how my daily work ties into the “big picture.” Thanks again! ~ Juanita Jamirez-Saucedo

“I wanted to take a moment and thank you again for the opportunity to attend this year’s conference. The fraud awareness and prevention presentation was very informative. I especially liked that we had different presentations to choose from each afternoon. I was able to attend the presentation I thought would be most beneficial to me. The experience was very rewarding and fun, I look forward to attending next year.” ~ Eric Larkin

“Attending this year’s NAAFA conference was extremely beneficial because it made me aware of upcoming changes to the financial aid process in the ’05-’06 school year. Also, it helped strengthen my skills when dealing with international students. If I had not attended the conference I would not have been aware of what a problem identity theft is in the U.S. and how to defend myself against it. I am also much more wary of students that can not provide correct documentation to prove their identity. Overall, it should be a requirement for any person working in the financial aid industry to attend NAAFA because it helps to keep us on our toes. Thank you for the opportunity to attend.” ~ Brian Silver

“I would like to thank NAFAA for the scholarship I received to attend our fall conference this year. The sessions were great! Some of my favorites were Fraud Awareness and Prevention, which included true stories from right here in Nevada, with identity theft issues. I always enjoy the Federal Update with Marianna Deeken, which always brings us up to date with current changes. The entertainment was awesome; my favorite part was the music by Gene Berg. Wow, he’s great! I would have to say though, that the fellowship with other Nevada colleagues was priceless. I appreciated the opportunity to attend. Thank you, NAFAA.” ~ Laura Whitelaw

“Just a little note of thanks. I am new to the world of financial aid (8 months in) and I found the conference very educational. The presentation on fraud was really informative; both personally and professionally. I look forward to attending next year.” ~ Natosha Walden

Conference News

The 2004 conference was off to a great start; this conference enjoyed the highest sponsor and exhibitor support to date—just another milestone for NAFAA. This year’s theme, “Reflection of Change,” began with opening commentaries by Jacquie Carroll, NAFAA president, and Jim White, WASFAA president, both of whom welcomed newcomers and encouraged participation for the upcoming year. Rhonda Groce introduced Pat Hodges, the principal of Reynaldo Martinez Elementary, and presented her with NAFAA’s support in the form of project Starfish. Ms. Hodges received the books and other educational items with gratitude and kindness. It is nice to know that we can make a difference even at the early elementary school levels.

The general session, “Fraud Awareness and Prevention,” presented by Kellea Norman, U.S. Department of Education, Office of Inspector General, really shed light on some of the new issues encountered by financial aid administrators and schools. Kellea highlighted two very public cases, one of which was referred by a Nevada school, and provided guidelines as to what information should be referred to OIG.

For the keynote address, Eileen Kean of Kean Government Associates provided a look at higher education over the past 30+ years. Of particular interest was the information provided about our state representatives; many are very active in higher education and on Capital Hill. Nevada has political capital!

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The afternoon sessions included “What’s in it for Me?” presented by Jacquie Carroll, which focused on NAFAA participation and individual professional development.
Concurrently offered was “Creating Interactive Forms Using Microsoft InfoPath” presented by Stephen Clemente. This workshop provided hands-on skills and recommendations on how to move toward a paperless environment by creating online, interactive forms using XML.

The afternoon brought back a crowd-pleaser from the U.S. Department of Education, Marianna Deeken, with detailed information on Return to Title IV. Concurrent session included a first-time panel of alternative loan offerings from sponsors and exhibitors. Over the past two decades there has been a significant increase in non-federal students loans, so participants were educated about alternative loans overall and techniques to help students understand this type of debt.

The evening event began with the President’s Reception and was kicked off with music from our very own Gene Berg. The transition to the banquet was seamless and good food, company and drinks were had by one and all. All appeared to be off to a good start when out of nowhere trouble came at the speed of light. “Werewolves, vampires, goblins and ghouls were part of the wedding party. That should tell you all.

The next day began with a business meeting. This was very exciting because there were enough current members present to approve some motions for much-needed motions. Please review a listing on the NAFAA website.

The early morning session “Financial Assistance for International Students” was presented by Jodie Gerber and Christopher Kypuros. This was a pertinent session in light of new legislations and restrictions for international students. The concurrent session “Leadership in a Time of Change” presented by Kelly Kilby highlighted very practical aspects regarding effective communication, streamlining operations and effective teamwork.

Lunch at the Guadalajara Restaurant presented the forum for our first-ever must-be-present-to-win and can-only-win-once raffle. It made for a lot of laughs and good times. So many winners—so little time!

The afternoon session presented by Charlotte Curtis and Susan Moore provided insights to the possible future and changes for Nevada’s Millennium Scholarship. There are several possible updates in the works and the program has been deemed successful.

As always, the last session of the Nevada State Con-
ference was the federal update presented by Marianna Deeken. Covered were some insights to FASFA 2005/06 delivery system and tools as well as changes and updates on current and pending regulations.

The session closed around 3:30 with a short reflection on the time that was shared. It was determined that this was a time when “what happened in Las Vegas does not stay in Vegas!” Mark your calendars for South Lake Tahoe in 2005.

Training

The Spring 2005 Federal Training, *Audits and Program Review: Paths for Success (Getting it Right)*, will be offered at Truckee Meadows Community College on April 21. Visit the Department of Education training registration website to sign up:

http://www.ed.gov/offices/OSFAP/training/index.html

Scholarships

NAFAA Conference recipients:

- Paige Hurley, TMCC
- Erik Larkin, Cordon Blue
- Juanita Ramirez, Cordon Blue
- Brian Silver, Cordon Blue
- Laura Whitelaw, WNCC

Upcoming scholarships—apply now for the Portland WASFAA Conference and Summer Institute. Look for an announcement on the NAFAA listserv during the first part of January.

Webster Has A New Entry:

**Real-Time** (rēal tīm), *n.* 1. the act of moving data so fast it takes your breath away. 2. the method by which ELMNet routes student loan transactions and status inquiries. 3. a tool that gives you answers now. *adj.* 4. the definitive answer on how to process student loans: Real time loan processing means origination and changes are done immediately 5. the most complete and current loan inquiry system available: Real time loan inquiry gives me all the loan information I need in a single screen.

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Aloha All,

As the Fall term begins we know it’s time for PacFAA activities to kick in. I keep telling myself that it’s time to do this and do that – got to get things started - and it seems before I know it, things are happening all around me. The PacFAA year is well underway! High School Training, Financial Aid Nights, College Goal Sunday, PacFAA training, Spring Conference, College Fair, Federal Training, Scholarships, Newsletters, Memberships, Fund Development – all of it seems to happen overnight! But, the truth is that none of our activities happen with out a lot of hard work by an outstanding group of volunteers and members. From the Executive Board to the Committee Chairs, from the numerous volunteers to all who participate – it happens because you make it so! It can never be said enough – Mahalo Nui to all of you who made PacFAA happen and my job a lot easier!

High School Counselors Training
This year’s High School Counselor Training was conducted on Oahu, October 26. Over 80 participants attended Marianna Deekan’s (US DOE Trainer for the Western Hemisphere) session, which provided updates on the 2005-2006 Application and Processing System and an overview of the EFC formula. Additional sessions were held in Hilo on October 28 – with over 80 participants and Maui on October 29 – with 25 participants. Mahalo to Jeff Scofield and staff (University of Hawaii – Hilo) and Paula Purdy & Cathy Bio (Maui Community College) for putting it all together.

Spring Conference – April 3-4, 2005
We have a location! Paula and Cathy (Maui Community College) have searched the Island of Maui high and low, spent countless nights testing room comfort and service levels, eaten hundreds of meals to compare menu selections, sacrificed their bodies to test Spa facilities and have come up with a winner - Diamond Resort Hawaii (www.diamondresort.com), located in Wailea, Maui. A truly beautiful and unique property is sure to provide the perfect setting for a very special 30th Anniversary Spring Conference. Watch for registration information in early January 2005.

Scholarships
Apply, apply, apply, apply!!!! Congratulations to Catherine Ganung (Hawaii Pacific University) who was awarded the WASFAA Scholarship for the JRS Management and Leadership Institute help in Phoenix, AZ, November 6-9. Watch for future scholarships for the WASFAA Conference (Portland, OR, April 17-19, 2005) and a special ‘PacFAA 30th Anniversary Spring Conference Award’ – both should be available in early January.

Financial Aid Nights
Financial Aid Nights have begun with the first sessions being held on November 16 and what a start: nine separate sessions on four islands in three days (November 16,17,18)! It is going to be a busy season! We expect to conduct over 50 sessions on six islands, reaching close to 4,000 students and their families.

College Goal Sunday – February 13, 2005
Plans are well under way for College Goal Sunday 2005. Once again this year we will be holding sessions at three locations: McKinley High School, Castle High School and Kapolei Middle School. The CGS event has recently come under the stewardship of NASFAA and is destined to become a National “Event.”
We had a wonderful fall conference in our state capital of Olympia this past October! Our conference co-chairs Rebecca Wonderly and Linda Wier did an absolutely outstanding job! With a theme of “It Depends” we found answers to all of our members questions. If in doubt, just say “It Depends”. We’re not sure, but it might have been our best attended conference ever!

The National College Fairs have come and gone again. I get inspired when I see the eager anticipation in the eyes of the High School students that come by exploring their future opportunities. And to think that many (if not most) of these students couldn’t attend school beyond the 12th grade if it weren’t for what we do. Thanks to Carol Moye and Marie Rynning for organizing the financial aid information that was given out in Seattle and Spokane...and thanks to those who manned the WFAA booth!

For many years we have felt the need to do some research to update our suggested student budgets. Year after year we have simply applied some cost-of-living factor to what we used the year before. Last year Carla Idohl-Corwin took the bull by the horns and, with some help, surveyed the state and really did an excellent job of updating and validating our budgets.

What’s coming up – Elections. Clara Capron is putting a ballot together for 05/06. Leadership conference. WFAA will be sending a couple of officers-to-be to the NASFAA Leadership Conference next March. Many of our members are working as an advisory committee with the Higher Education Coordinating Board to tweak the allocation formula of our State Need Grant Program to equitably distribute school reserves. Training. Marilyn Ponti and her committee are starting the planning process for 2005 WFAA training.

BIOS

Who is Kate Peterson?

Kate Peterson has worked in Financial Aid for over twenty-five years. During that time she has worked in Washington, Idaho, Arizona and most recently in Oregon as Director of Financial Aid and Scholarships at Oregon State University. Kate has enjoyed serving various committees and offices in WFAA, IASFAA, AASFAA, OASFAA, WASFAA and NASFAA including 2003-04 WASFAA President. Kate received her Bachelors of Arts from Washington State University and her Masters of Higher Education Administration at the University of Idaho.