



Western Association of Student Financial Aid Administrators

2005-2006 Year End Reports

2005-06 WASFAA Committee Chair/Officer Year-End Reports

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Committee Name/Officer: Electronic Services

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Committee Members (Name/Place of Employment)

Selmarie Stacy
Evergreen State College

Goals:

Keep the membership informed of Association activities via the web.

Activities:

Routinely sent out mass emails about various WASFAA events.
Worked with membership to clean up membership database.
Worked with Fund Development to implement new automated vendor section of website.
Established an Invoice Download module to assist Treasurer with tracking of invoices.
Reviewed and approved approximately 100 online Job Announcements.
Worked with Treasurer to automate data entry into QuickBooks.

Approved Budget Breakdown and Actual Expenditures to Date:

WASFAA Electronic Services Breakdown

2005	Jan	Feb	Mar	Apr	May	Jun
Monthly Hosting	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00
Annual Domain Renewal				\$25.00		
Pre-Conf Reg Form		\$175.00				
Annual Banner Ad Setup				\$450.00		
Planning Meeting	\$20.00					
Total	\$270.00	\$425.00	\$250.00	\$725.00	\$250.00	\$250.00

2005	Jul	Aug	Sep	Oct	Nov	Dec
Monthly Hosting	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00
Invoice Download Module		\$350.00				
Fall Training			\$125.00			
Database Upgrade & Fund Development					\$750.00	\$750.00
Online Election						\$400.00
Total	\$250.00	\$600.00	\$375.00	\$250.00	\$1,000.00	\$1,400.00

Total for 2005: \$6,045.00

Progress Toward Strategic Plan Goals/Activities:

Continuing to work with various committees on projects.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Plan ahead and maintain a timeline of WASFAA activities.

Committee Name/Officer: Training Committee

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Bert Logan
Lane Community College
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Eugene, OR 97405
Phone: (541) 463-5266
Fax: (541) 463-3983

Francie Campbell, EdFund
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Dixon, CA 95620
Phone: (707) 693-0154
Fax: (707) 693-0450

Committee members (Name, College or Employer, State):

Connie K Barton - Shasta Bible College & Lassen Community College, CA
Barbara L Burnett - University of Alaska – Southeast, AK
Samuel F Collie – Nelnet, WA
James R Martin - Idaho State University, ID
Mina M Nix - University of Alaska – Fairbanks, AK
Cynthia D Pollard - Warner Pacific College, OR
Lori J Tiede - Western Nevada Community College, NV
Rick Weems - University of Alaska – Anchorage, AK

Goals:

As it pertains to Goal #1, for Fall 2005 Training, the Committee provided 11 site trainings to 347 registered members. Spring 2005 information is not available.

As it pertains to Goal #3, the Training Committee utilized all volunteers available who indicated Training as their first choice on the WASFAA Volunteer list.

As it pertains to Goal #4, the Training Committee solicited recommendations from the membership in December, resulting in Veterans Issues and Professional Judgment as the 2006 Spring Training Topics.

As it pertains to Goal #5, Spring Training is in the final stage of curricular development and coordination with the Office of Veterans Affairs and is set to deliver the same number of site trainings mid-April through May, 2006.

As it pertains to Goal #6, with the assistance of Kathy Campbell, Chemeketa Community College, site procedures for scheduling WASFAA Trainings has been drafted.

Activities:

The Training Committee completed fiscal year 2005 under budget and very close to revenue projections. Spring 2005 Training generated approximately \$4,150 in revenue. Fall Training generated approximately \$14,500 in revenue.

Approved Budget Breakdown and Actual Expenditures to Date:

FY 05 Approved Budget: \$72,324. Actual Expenditure: \$65,119*.

* The Executive Committee approved two trainers per site for the Fall training evolution. A significant part of cost savings came from the generous contribution toward travel expenses and material delivery via EdFund (Francie Campbell) and Nelnet (Sam Collie), which was an unexpected benefit of their committee member participation. Also, as much as possible, trainer assignments were made based on proximity to the training site. This had mixed reaction from some members who were seeking expertise outside of their State Professional resource pool.

FY 06 Approved Budget: \$80,000. Actual Expenditures to Date: \$2,224

Progress Toward Strategic Plan Goals/Activities

As it pertains to Goal #2, & #5, The Training Committee experimented with recording Fall Training and developing a stand-alone mechanism for the delivery of training. Effectiveness of this effort has yet to be determined. Preliminary feedback from the membership resulted in this method of delivery being less than preferred due to the networking advantages available via live training.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

As it pertains to Goal #6: develop a subcommittee of training veterans to develop Training Manual.

As it pertains to Goal #7: This is a difficult endeavor without close cooperation and attention from State Presidents.

Committee Name/Officer: Treasurer

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

Peter Miller
Alaska Pacific University
4101 University Drive
Anchorage, AK 99508

907-564-8342
pmiller@alaskapacific.edu

Committee Members (Name/Place of Employment)

None – Special thanks though to my staff at APU for their assistance.

Goals:

Maintain the Association funds and financial records.

Activities:

Developed method to import membership data and invoice data into QuickBooks
Using QuickBooks routinely emailed members with past due invoices.

Approved Budget Breakdown and Actual Expenditures to Date:

None

Progress Toward Strategic Plan Goals/Activities:

Continuing to work with various committees on projects.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Plan ahead and maintain a timeline of WASFAA activities.
Develop a one-year timeline of income / expenses for planning purposes.

Committee Name/Officer: California State Association - CASFAA

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Joanne Brennan – President 2005-2006

Committee members (Name, College or Employer, State): N/A

Goals:

Through out the year I tried to focus on the theme of my presidency, "Together we achieve more". The primary challenge was "What could we as an association do to be more involved in public policy discussions and decision, to raise awareness of the association and increase its visibility in the both federal and state policy making circles. This year CASFAA worked tirelessly with other stakeholders including CCCSFAAA and CLFE. A great deal of our time was devoted to discussions and subsequent attendance at public meetings, and in consultation with legislative staff and public policy leaders to identify concerns, define solutions and communicate them to the appropriate officials. This renewed focus on advocacy efforts and the collaboration with partners on both federal and state issues, gives CASFAAA a stronger voice and greater recognition as an advocate for our 1700 members and the millions of students that we strive to serve. We have worked to establish new relationships and restore or maintain existing ones. It is my sincere hope that we continue our work with our partners. A collective voice is much louder than an individual whisper.

CASFAA held elections in July, much earlier than in previous years. This allowed for an overlap of 2005-2006 boards to provide an orientation and to facilitate training and transitions. At our most recent board meeting in November we conducted a "CASFAA BOOT CAMP" which was created to orient elected officials and appointed committee chairs and Liaisons to "PLANNING, FISCAL & BUDGET BASICS".

This year there were over 36 CASFAA committees that had over 200 of CASFAA's members volunteering in some capacity for the association.

Approved Budget Breakdown and Actual Expenditures to Date: N/A

Progress Toward Strategic Plan Goals/Activities

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Continue to have all state presidents meet before the EC meeting. It worked!

Committee Name/Officer: Volunteer Development Committee

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Committee Members (Name/Place of Employment)

Diane Aurenz, Chela Financial
Valerie Biggs, Nellie Mae
Cheryl Kibarian, NSLP
Jannine Oyama, Honolulu Community College
Frank Silva, University of Hawaii
Teresa Yslas, Pima Community College

Goals:

These are the 2005-2006 Volunteer Development Goals

- Goal 1. Draft language pertaining to this committee to propose for addition to the Policies & Procedures manual.
- Goal 2. Develop framework for and coordinate Newcomer's Session program at annual conference.
- Goal 3. Improve communications with members regarding volunteer participation.
- Goal 4. Create an information flyer about the benefits of volunteering for WASFAA, including committee and activity descriptions associated to time commitments involved.
- Goal 5. Develop calendar for volunteer participation.
- Goal 6. Assist in solicitation of and coordinate the placement of volunteers.
- Goal 7. Consider the suggestion to Executive Council of stipulating a percentage or minimum number of committee members fairly new to the profession, committee or Association be part of each committee, as appropriate.
- Goal 8. Contemplate the need for a mentoring program and/or buddy system.

Activities:

1. Drafted language for Policies & Procedures manual that was approved February 10, 2006 by the Executive Council.
2. Developed information flyer listing committees, brief overview and potential time commitment and provided to state presidents/WASFAA representative for distribution at conferences with WASFAA giveaway encourage participation in WASFAA. The giveaway was a screen sweeper.

3. In final stages of converting information flyer to brochure to be available at annual conference and during 06-07.
4. Developed the program for the 1st Timer/Newcomer session at the annual conference to include an overview of the conference program and time to network.
5. Contacted all members who expressed interest in volunteering 1/1/05 – 9/1/05 that were not selected to participate on a committee.
6. Providing a session on volunteering in general and how it works with WASFAA at the annual conference.
7. In process of working with ATAC to update the volunteer section of the website to include brief description of committee activities.
8. In process of developing volunteer participation calendar.
9. Presented proposal to the Executive Council that recommended 20% of committee membership (when possible) be volunteers new to the Association, new to the profession followed by new to the committee. This proposal was approved February 10, 2006.
10. Presented the idea of a buddy program to the Executive Council to try as a pilot which was agreed to. Are in the process of working with the Research Committee to do a feasibility survey.
11. Coordinating WASFAA Exhibit booth for the annual conference to provide information to our membership on the Association activities, documents (Strategic Plan, Bylaws, and Policies & Procedures), membership benefits & volunteering.

Approved Budget Breakdown and Actual Expenditures to Date:

\$1,000 for 2005 to cover expense of giveaway item at the 05-06 state conferences encouraging involvement in WASFAA. All was spent in 2005.

\$10,600 for 2006 to cover expenses related to:

- First Timers/Newcomers session at annual conference
- WASFAA booth/exhibit collaterals
- Giveaway for state conferences (06-07)
- Volunteer Committee information & Committee expenses

No expenditures for 2006 have been spent at this time.

Progress Toward Strategic Plan Goals/Activities:

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

The creation of the Volunteer Development Committee (VDC) has helped WASFAA to initiate a more formal approach to including members in Association activities through volunteering and coordination with committee chairs. We are spearheading the WASFAA booth at the annual conference that will accommodate another conduit for the WASFAA leadership to discuss the benefits of being a member and volunteer opportunities. The development of a document that lists committees and potential time commitment was completed and shared at all state conferences. We have now made this a formal trifold brochure. The VDC proposed a 20% “new to committee” make up of

committee members (when possible depending on committee) to the Executive Council which was approved February 10, 2006.

Goals #7 – Continually improve methods and processes for communicating with the membership:

The VDC is working on improvements at the website regarding information on volunteering to include brief description of each committee and general activities along with an automatic response. We implemented a communiqué to those members not selected for committee participation this year and will continue with that step as well as adding the process of communicating with those selected and coordinating with committee chairs.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Continue to:

- Improve on communications with volunteers regarding involvement with WASFAA.
- Work with committee chairs in providing information regarding volunteers to maximize placement of volunteers and consideration of 20% (when possible) or more being new to the Association, WASFAA and committee.
- Work with President-Elect to enhance volunteer development, volunteer web information and newcomers session.
- Provide document to attendees of Sister Dale Brown Summer Institute and Jerry R. Sims Management & Leadership Institute that highlights membership benefits and volunteer opportunities.
- Develop a buddy program
- Work on volunteer participation calendar

Committee Name/Officer: Oregon State Association - OASFAA

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

Oregon State President
Oregon Institute of Technology
3201 Campus Drive
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(541) 885-1291
tracey.lehman@oit.edu

Goals:

- Update policy and procedures including changing the time that officer take office from June 1-June 1 to annual conference to annual conference (January-January)
- Form an ad hoc website committee
- Formulate e mail etiquette for executive council
- Include Oregon Leadership Institute items during changes through the year

Activities:

Summer Drive In Workshop
Support Staff Workshop
Financial Aid 101 Training
Annual Conference
OPB Night

Progress Toward Goals:

- We did hold a special vote to change policy and procedures and officers office dates
- Did not make progress on ad hoc website committee
- We did hold 5 very successful events listed above and did include Leadership elements in the summer drive in
- Did contribute funds for the states affected by Hurricane Katrina for staff training
- Provided scholarships to members for the annual conference and WASFAA conference

Suggestions for Committee Chair/Co-Chair or Officer Successor:

- I am the successor ☺

Committee Name/Officer: Newsletter Committee

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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503-399-2511
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Kathreen Silva
University of Idaho
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Moscow, ID 83844-4291
208-885-6312
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Committee Members (Name/Place of Employment)

April Brimelow, Washington State University Vancouver
Jacquie Carroll, University of Phoenix
Mike Johnson, NELA
Makayla Pedey, Southwestern Oregon Community College

Goals:

1. Conduct short survey to determine member preferences for Newsletter material.
2. Focus on articles regarding training, federal issues, and upcoming WASFAA events.
3. Solicit articles which demonstrate WASFAA's advocacy efforts in order to bring more attention to this important role of the Association.
4. Develop and distribute a production schedule of the dates to produce, post, and print newsletters.
5. Produce one hardcopy version of the Newsletter each year, prior to the Annual Conference.

Activities:

1. The survey will be in the Spring Newsletter which will be included in the Conference packet and mailed to members and recent past members who do not attend the conference.
2. Articles regarding training, federal issues and WASFAA events have been solicited from EC members.
3. Federal issues have been included in each Newsletter.
4. A schedule of production, posting and printing Newsletters was developed and posted on the WASFAA website.
5. A hard copy of the Newsletter will be included in the Conference packet, as stated in activity number one.
6. Information about the Strategic Plan will be included in the hard copy Newsletter.
7. Ten cub reporter packets are being developed for the conference which will include disposable cameras, notepads and press passes.

Approved Budget Breakdown and Actual Expenditures to Date:

Budget \$9,300

Spent year to date \$510

Progress Toward Strategic Plan Goals/Activities:

1. A survey about the Newsletter was developed for the Spring Newsletter and will be used in planning future Newsletters.
2. Articles regarding training, federal issues and WASFAA events have been solicited and those received included in the Newsletter.
3. Federal issues have been included in every Newsletter published in 2005-06 and will continue to be included for 2006-07.
4. A schedule of production, posting and printing Newsletters was developed and posted on the WASFAA website.
5. New volunteers for the Newsletter Committee will be sought for 2006-07 to encourage more volunteers for WASFAA.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

None

Committee Name/Officer: Federal Issues Committee

Chair/Co-Chair/Officer:

Tami Sato
Southern California College of Optometry
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Fullerton, CA 92831
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tsato@scco.edu

Committee Members:

Colleen MacDonald, Stanford University, Graduate School of Business, CA
Steve Seeman, Highline Community College, WA
Janell McIntyre, Charter College, AK
Jeff Schofield, University of Hawaii at Hilo, HI
Vicki Shipley, Southwest Student Services Corporation, AZ
Judith Poutasse, Law Offices of Judith Woo Poutassee, PC, OR

Goals:

1. Review pending proposals or bills and respond as necessary
2. Communicate federal and congressional updates to WASFAA members through newsletter articles and listserv messages.
3. Develop and present a session on a current federal issue at the WASFAA Annual Conference.
4. Define the advocacy role of WASFAA in the Western region. Develop an advocacy policy/plan that defines whether WASFAA can speak for the whole region or if the advocacy role should be to inform and facilitate WASFAA members and students to provide their input and comments directly to their legislative representatives.
5. Update the WASFAA recommendations to include the new proposals in the Reauthorization of the Higher Education Act.

Activities:

1. Listserv Messages – Sent 23 messages to WASFAA members. Topics included loan consolidation, STAR Act, Stafford interest rates, RHEA, HR 609, Constitution Day, 2006 Appropriations bill, SDS Application, and the Deficit Reduction Bill.
2. Newsletter Articles - Submitted 1-2 articles for each issue of the WASFAA Newsletter. Topics included WASFAA advocacy, merit vs. need grants, Congressman McKeon, COHEAO Conference, RHEA Update and Trends in Higher Education.
3. Added section to WASFAA web site called “Let Your Voices be Heard” on advocacy. This included links, hints, talking points and a sample letter.
4. WASFAA Conference Session – The committee put together sessions on the regulatory changes in the loan consolidation program.

5. Review of Federal Issues Documents – Read and summarized many reports, bills, acts, monographs, and comparison charts.
6. Related Meetings – Participated in CASFAA Federal Issues Committee meetings, COHEAO Mid-Year Conference, Sallie Mae Forum, National Forum on Educational Loans and a HRSA meeting.
7. WASFAA Council Meetings – Provided a report of current federal issues at each executive council meeting.

Approved Budget Breakdown and Actual Expenditures to Date:

The 2006 Budget for the Federal Issues Committee is \$500. This can be used for attendance to some of the related meetings. Information from the meetings is used for council reports or newsletter articles. From January 2005 to December 2005 the committee utilized \$495 of the \$500 budget.

Progress Toward Strategic Plan Goals/Activities

Goal #2b (Track amount of communication from Federal Relations Committee on advocacy-related issues)

1. Encouraged members to write their Senators to sign on the letter supporting PSL and the Kennedy amendment.
2. Sent WASFAA comments on revisions to the 2006/2007 FAFSA.
3. Submitted comments on NASFAA's additional Reauthorization recommendations.
4. Provided an updated WASFAA Reauthorization recommendation and comments on H.R. 609.
5. Sent a letter to the HELP Committee urging support of campus-based programs.
6. Sent a listserv message to membership with talking points and web links to encourage contacting legislative representatives.

Goal #2c (Track actions taken by members in response to calls for action)

1. Received 12 requests for SDS Guidebooks for submitting the program application
2. Received 3 responses from members that they have contacted their congressional representatives.

Goal #3 (Collaborate and coordinate with other organizations and associations)

1. Participated on the CASFAA Federal Issues Committee. Their chair served on the WASFAA Federal Issues Committee.
2. CASFAA requested use of the WASFAA web site section on advocacy.
3. At last years NASFAA Leadership Conference we organized a joint meeting of WASFAA, CASFAA and CCCSFAAA members to meet with legislative staff members.
4. Provided the Reauthorization Update at the IASFAA Conference.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

1. Continue frequent communication with membership through listserv messages and newsletter articles. Summaries with just the most important issues are appreciated.
2. The WASFAA advocacy role should be both presenting positions from the region and promoting and assisting members in the region to voice their own opinions.

3. Tracking responses for the Strategic Plan can be done either by requesting those who have responded to send a copy of their letter to the chair or by working on the federal issues section on the website where tracking will be done automatically.
4. Provide emphasis on the proprietary sector in reports to council or communications in the first suggestion.

Committee Name/Officer: President Elect

Committee Chair/Co-Chair/Officer:

Tami Sato
Southern CA College of Optometry
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Fullerton, CA 92831
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Goals:

1. Learn the duties required of the president of WASFAA and the organizational structure of the Association.
2. Actively participate on the WASFAA Committees required: Fiscal Planning, Nominations and Elections, Membership (ex-officio), Policies and Procedures, and Strategic Planning.
3. Attend the NASFAA Board of Director meetings as an observer to prepare for participation as a voting member in 2006/2007.
4. Appoint a great Conference Chair and oversee the conference planning.
5. Fill the spreadsheet set up for the 2006/2007 WASFAA volunteers.
6. Take notes at meetings, write down ideas, form goals for the next year.
7. Enjoy the calm before the storm.

Activities:

1. Reviewed the Transition Resource Manual that Steve provided last year.
2. Reviewed the notebook from the 2005 NASFAA Leadership Conference
3. Read every Year-End report for an overview of the activities of the year.
4. Attended the NASFAA Board of Directors meeting in Austin, Texas. Met with other regional Presidents and President-Elects to discuss common issues.
5. Attended the Strategic Planning and Fiscal Planning meetings before each Executive Council meeting.
6. Attended the IASFAA Conference and CASFAA Conference representing WASFAA. Besides providing a WASFAA update I also participated in a session.
7. Participated in conference call meetings for the Nominations and Elections Committee and the Volunteer Development Committee.
8. Notified both the winners and non-winners from the election.
9. Reviewed menu selections for the Transition Meeting and the first council meeting in Los Angeles.
10. Have successfully recruited representative-at-larges, chairs and co-chair positions for the 2006/2007 year.
11. Planned and organized the Transition Meeting with Don Black as the facilitator.

Approved Budget Breakdown and Actual Expenditures to Date:

There is no budget for this position. Travel to the NASFAA meeting falls under the State and Other Meeting expense item. (NASFAA does not pay expenses for observers)

Progress Toward Strategic Plan Goals/Activities:

#5d (Increase in number of new Executive Council members) – There are six new members that will be attending Executive Council Meetings as chairs or representative-at-large positions. There are many others who are new to the position they are holding but have served WASFAA in different roles in the past. The logical method to increasing the number of new Executive Council members is to increase the number of new members on committees and as committee chairs.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

1. It seems like a lot of committees to participate on but it gives a good foundation for understanding the workings of the association.
2. Attending the NASFAA Board Meeting as an observer does not mean that you cannot contribute to the discussions.
3. If you participate on committees for other organizations or advisory boards, start to curtail your obligations.
4. Steve said he started looking for chairs at the annual conference. This is good advice. In some positions it makes sense for a WASFAA volunteer to do the job for more than one year.
5. Preparation for the Transition Meeting is huge. Provide enough lead time for this project.
6. What is developing is lots of E-mail messages and lots of details, details, details...

Committee Name/Officer: Fund Development

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Judy Saling
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1278 University of Oregon
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541 346-1195
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Theresa Bosworth
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tbosworth@bluecc.edu

Committee members (Name, College or Employer, State):

Brooke Mitts
Multnomah Bible College & Biblical Seminary, OR

Goals:

1. Work with the Electronic Services Committee to further develop features of the WASFAA website as potential revenue sources.
2. Research other possible WASFAA revenue options.
3. Continue the refinement of the tier sponsorship approach and determine a more realistic fund-raising goal for the Association.
4. Work with the WASFAA Newsletter Committee to determine the effect of moving from 6 newsletter editions to 4, and providing both hard copy and electronic versions of the newsletter.
5. Track singular in-kind support greater than \$2,000.

Activities:

1. Worked with Peter Miller to further develop Sponsor/Vendor site to include the following forms and information:
 - a. [2006 Sponsorship Opportunities](#)
 - b. [2006 Newsletter Advertising Application](#)
 - c. [2006 Exhibitor Booth Application](#)
 - d. [2006 Exhibitor Only Registration Form](#)
 - e. [2006 Regular Conference Registration Form](#)
 - f. List of sponsors and the level of sponsorship

2. Added additional benefits to Diamond and Platinum levels.
3. Developed a Master Activity calendar for Fund Development
4. Sent email notifications out to all known lenders and prior WASFAA sponsors to solicit new sponsorships for the year.

Approved Budget Breakdown and Actual Expenditures to Date:

<u>Approved Budget Breakdown</u>	<u>Actual YTD</u>
Income:	\$160,000
General Sponsorship	\$ 97,364
Exhibitor Booths.....	\$ 72,900
Conference Program Ads	\$ 1,200
Newsletter Ad costs	<u>\$ 8,600</u>
Total.....	\$180,064

Expenses: \$5,000

- \$0 expenses to date as drayage costs are paid at end of conference.
- Other expenses: vendor gift from President (normally price range \$10 - \$15 ea. – we currently have 53 exhibitors for conference – estimated cost \$600 - \$900)

Progress Toward Strategic Plan Goals/Activities:

Goal #6 - Maintain the long-term financial stability of the Association

- The committee has made some strides in this area but will continue their work with Fiscal Planning to look for other possible revenue streams for WASFAA.

Goal #7 – Continually improve methods and processes for communicating with the membership

- We have made steps in this direction by enhancing the Sponsor/Vendor webpage with forms and directions as indicated in “Activities”. This will be an ongoing activity each year to address and support communication with new and returning WASFAAA sponsors/vendors.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

- Continue to enhance the Sponsor/Vendor web page
- Continue to review benefits for each level to determine if additional benefits can be added at each sponsorship level
- Develop a way to track in-kind support greater than \$2,000 from vendors/sponsors

Committee Name/Officer: Ethnic Diversity Action Committee

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Frank Silva
University of Hawaii at Manoa
2600 Campus Road, Honolulu, Hawaii 96822
808-956-3987 office 808-956-3985 fax, silvafr@hawaii.edu

Committee members (Name, College or Employer, State):

Kathy Colasurdo, Bellevue Community College, Washington
Pat Peppin, Mesa Community College, Arizona
Teresa Romero, CSU San Marcos, California
Luhui Whitebear, Confederated Tribes of Grand Ronde, Oregon

Goals:

1. Continue to research the idea of changing the focus of the committee from "ethnic" diversity action committee to a more inclusive "diversity" action committee to incorporate the needs of other diverse groups such as the disabled; gay, lesbian, and transgender; etc.

Status: On going, will require additional input from membership and possibly the help of the Research Committee

2. Host a reception as a part of the annual conference to promote diversity and inclusiveness.

Status: Reception will be held in conjunction with President's Reception.

3. Establish the position of a Native American representative to the Wasfaa board.

Status: President Tami Sato has appointed Jana Narcia to serve as a segmental representative at large.

4. Create a list serve to promote communication between members of diverse backgrounds and to share EDAC activities (ie: list EDAC scholarship recipients and how the scholarship helped them.

Status: On going

5. Have the chairperson of EDAC be a standing member of the Volunteer Development Committee.

Status: EDAC Chair served on the Volunteer Development Committee.

6. Submit articles to the WASFAA Newsletter on a regular basis that would be of interest and relevance to the membership concerning diversity issues.

Status: On going

Activities:

Committee Chair served on Strategic Planning, Nominations & Elections, and Volunteer Development Committees.

Primary committee activity centered around the awarding of EDAC scholarships to Sister Dale Brown Summer Institute, Jerry R. Sims Leadership & Management Training, and to the annual WASFAA Conference.

There were 17 scholarship applications for the Summer Institute.

Summer Institute Scholarship Winners:

Karla Gonzalez, Mesa Community College, Arizona

Jessica Wright, Clark College, Washington

Kilohana Miller, Maui Community College, Hawaii

Gregorio Alcantar, CSC Northridge, California

There was 1 scholarship application for the Leadership & Management Training.

Leadership & Management Training Scholarship Winner:

Edgardo Cornejo, Pima Community College, Arizona

The deadline for scholarship applications was March 2, 2006, there are 9 applications for the Annual Conference and the winners will be announced soon.

Committee members conducted diversity workshops and training in their home states and will be participating in 2 sessions at the annual conference in Reno, Nevada.

Approved Budget Breakdown and Actual Expenditures to Date:

Ethnic Diversity Action Committee Budget = \$7000 Expenditures to date = \$0

EDAC Conference Scholarship Budget = \$5000

EDAC Summer Institute Budget = \$5000

EDAC Leadership & Management Budget = \$5000

Progress Toward Strategic Plan Goals/Activities

Goal #4 Maintain and enhance the diversity of our membership and the Executive Council

Our greatest success toward achieving this goal was evidenced by the participation of Teresa Romero as a member of EDAC. Teresa was a conference scholarship winner in 2005. The election of Luhui Whitebear to the Executive Council as a Representative at

Large and Chair of the Ethnic Diversity Action Committee and the election of Pat Peppin as WASFAA Vice President. Additionally, WASFAA President Tami Sato has appointed Jana Narcia as a segmental representative at large, representing the Native American Community on the Executive Council.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Utilize the skills and expertise of committee members. Coordinate and conduct at least one in-person meeting. Assign/suggest that committee members serve on other WASFAA Committees particularly, Summer Institute, Conference, Leadership & Management, and the Training Committee.

Committee Name/Officer: Awards and Scholarships

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Committee Members (Name/Place of Employment)

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Goals:

1. Review award titles and descriptions for currency and appropriateness.
2. Make recommendation to E.C. as to the appropriateness of current E.C.
3. members being considered for awards.
4. Promote the awards procedures in time for the nominations
5. Increase the number of award nominations received from the membership.

Activities:

We will have accomplished all of our goals by the end of the year. We also created a new scholarship application and set into motion the procedures for processing the scholarship application and notifying all applicants of the results. We also set up a certificate template bank for future use by the Awards Committee.

Will also set up a timeline calendar of activities for the new chair.

Approved Budget Breakdown and Actual Expenditures to Date:

	2005	2006
Budget	\$2,000	\$2,000
Expenses*	\$ 838.52	\$ 0

*Expenses consist of blank certificates, folders, plaques, engraving services, printing cartridges and mailing costs

Progress Toward Strategic Plan Goals/Activities:

They will be complete by the end of the year. We have made our recommendation to the EC and it was approved that current elected officers will not be considered eligible for an award the year they are on Executive Council. We increased the number of nomination for awards and we reviewed the appropriateness of the current awards being offered. We are writing procedures to be included in the P&P on the scholarship process and procedures.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

The Scholarship application be revised to eliminate the need for home address and information. This would only be collected from actual recipients in case of an emergency. We will change the deadline for submission of the application to 60 days prior to the event in order to allow sufficient time to select the recipient and still arrange for transportation (timely and cost effective).

Continue to build the certificate template bank for future use. Recommend the chair obtain the WASFAA President’s signature (electronically) to expedite the processing of certificates, some that happen very quickly after the WASFAA annual conference (Sister Dale Brown Summer Institute). Set procedures to secure the President’s signature.

Make contact with the engraver early to help facilitate the creation of the award plaques for the annual conference.

Committee Name/Officer: Alaska State Association (ALASFAA)

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Janell McIntyre, President 2005-2006

Goals:

1. Increase membership/participation
2. Develop a tiered sponsorship plan
3. Organize and hold fall conference
4. Develop a training manual for future boards
5. Develop and implement a renewable training/leadership scholarship program

Activities:

1. Increase Membership-During the last year, the membership committee put forth a lot of effort to increase membership as well as participation at our fall conference. Conference attendance was the highest in ALASFAA's history.
2. Tiered Sponsorship-The Funds Development Committee successfully streamlined our sponsorship form which greatly assisted in our ability to collect over twice the amount of funds as in previous years.
3. 2005 Fall Conference went extremely well and addressed the multi-level needs of our membership. The committee successfully pulled off a jam-packed agenda which included breakout sessions. In prior years, breakout sessions were not possible as membership and participation were low.
4. Training Manual-this project is ongoing
5. Scholarship-Worked with Sallie Mae Funds to obtain \$5000 in grant funds for 2005-06. These funds will be used to develop an ALASFAA Scholar Program and send members to various training opportunities for which they would not otherwise be able to attend. Funds are renewable through SALLIE MAE FUNDS but must be applied for each year by the incoming executive board.

Committee Name/Officer: Arizona State Association

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

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Mesa Community College
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Goals:

The goals for AZ this year were to get the committees on track and go over their responsibilities. We had lost the communication component from one year to the next. The newcomers were lost.

Survey our membership and ask about that AASF AA has to offer. If the membership still wants two conferences or is one enough. Terri Eckel our president-elect sent a survey to the membership.

Updated our P&P.

Enhanced our web pages to include volunteer information and sign up opportunities on the web.

Started up our AUTO FNA process.

Progress Toward Strategic Plan Goals/Activities

Continue to work with the incoming President. Let them know what is expected and what helped me that may also help them.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Make sure of up coming deadlines. Continue to work with other state presidents. It has been very informative when talking to the other state reps. It helps improve our own association. Make sure you communicate with your own association. Make sure you pass along important information.

Committee Name/Officer: Jerry R Sims Management & Leadership Institute

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

Don Black
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3941 Park Drive
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El Dorado Hills, CA 95762

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Don.black@nelnet.net

Committee Members (Name/Place of Employment)

Wayne Sparks – Washington State University
Toni DuBois – Long Beach City College
Syed Rizvi – Santiago Canyon College
Jacquie Carroll – University of Phoenix Reno
Jennifer Satalino - Nela
Elizabeth Bickford – University of Oregon

Goals:

- Provide advanced training to members interested in becoming more effective managers and leaders in their office, institution and in their professional organizations.
- Work with Site selection to find one or two consistent locations that are affordable in an effort to keep cost low per WASFAA member survey
- Develop a pre and post survey to assess: Reason for attending, reason for not attending, Expectations, satisfaction
- Capitalize on prior success and address concerns of prior evaluations
- Collaborate with State Associations in development and deployment of JRS MLI by asking the leadership development needs in their state so as to influence curriculum development.

Activities:

NOVEMBER 6-8 * PORTLAND, OREGON**

**JERRY R SIMS MANAGEMENT AND LEADERSHIP
INSTITUTE**



The institute was held at the Benson Hotel November 6-8. We had a total of 32 participants, 30 on site and 2 commuters. There were 6 faculty and 1 site coordinator.

The event went very well and the early evaluations are giving excellent reviews. There has not been any negative feedback at this point. There have been some constructive comments which will be evaluated.

The Committee, Wayne Sparks, Toni DuBois, Syed Rizvi, Elizabeth Bickford, Jacquie Carroll and Jennifer Satalino are the reason for the tremendous success of the Jerry R. Sims Management and Leadership Institute. Jerry would be proud of their leadership, training and dedication to WASFAA.

Approved Budget Breakdown and Actual Expenditures to Date:

JRS MLI Budget			
	Budget	Actual	Difference
Income	\$20,250.00	\$18,187.52	-\$2,062.48
Expense	\$23,790.00	\$23,751.31	\$38.69
Total Difference	-\$3,540.00	-\$5,563.79	-\$2,023.79

Progress toward Strategic Plan Goals/Activities:

The following is a summary of the Goals and Results.

Provide advanced training to members interested in becoming more effective managers and leaders in their office, institution and in their professional organizations.

Achieved with great success.

Work with Site selection to find one or two consistent locations that are affordable in an effort to keep cost low per WASFAA member survey

Still need to complete – Cost was again a factor in this year’s institute. Early evaluations indicate that participants feel they received an excellent value for the training received.

Develop a pre and post survey to assess: Reason for attending, reason for not attending, Expectations, satisfaction

Both a pre and post conference evaluation was completed. The pre conference evaluation however, focused on personality types rather than expectations. The Post conference evaluation was collected via electronic form.

Capitalize on prior success and address concerns of prior evaluations

Evaluations reflect that this goal has been accomplished.

Collaborate with State Associations in development and deployment of JRS MLI by asking the leadership development needs in their state so as to influence curriculum development.

This goal was not achieved due to time limitations

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Try to work more closely the state associations in coordinating determining topics for the institute.

Committee Name/Officer: Graduate/Professional Committee

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Committee Members (Name/Place of Employment)

Troy Mullenbach, AZ State University
Laurie Radford, National College of Naturopathic Medicine
Elaine Robinson, Nellie Mae
Heather Trujillo-Smith, Stanford University Graduate School of Business
Kyle Poston, Sallie Mae
Kathleen Koch, Seattle University School of Law
Debbie Serrano, Azusa Pacific University
Jodi Gerber, University of Nevada, Las Vegas

Goals:

1. Contact interested members of the G/P segment to join G/P committee
2. Brainstorm with committee ways to increase participation of G/P segment in WASFAA.
3. Connect with WASFAA state presidents to contact state G/P committee chairs and compare initiatives, activities, and resources. See if state committees can work together.
4. Establish a possible budget for G/P committee based on recommendations of G/P committee for possible activities.
5. Recommend G/P specific session for WASFAA conference, G/P newsletter articles, and G/P activities

Progress Toward Strategic Plan Goals/Activities:

1. Contacted interested members and formed G/P committee
2. Contacted state presidents to determine only California has a state G/P committee at the state level.
3. Attempted to brainstorm with committee; not as fruitful.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

1. Do not rely on committee participation as much as this was difficult to obtain from all members.
2. Work with key members of committee that are more forthcoming to determine activities for G/P segment. Perhaps a smaller committee may be beneficial.
3. Work with CASFAA G/P chair to co-sponsor events.

Committee Name/Officer: Fiscal Planning Committee

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Committee Members (Name/Place of Employment)

Dwight Berreth, Boise State University
Theresa Bosworth, Blue Mountain Community College
Pam Doerner, University of Alaska-Anchorage
Steve Herndon, CSU, Bakersfield
Peter Miller, Alaska Pacific University
Judy Saling, University of Oregon
Tami Sato, S. California College of Optometry
Jim White, Seattle University

Goals:

- 1.) Finalize WASFAA's investment policy
- 2.) Monitor with the Treasurer WASFAA's short and long term investment instruments
- 3.) Update asset inventory
- 4.) Explore with the Membership Chair the implications for WASFAA to change from an individual to institutional membership structure
- 5.) Establish a balance budget for 2006
- 6.) Review budget revision requests for 2005

Activities:

- 1.) Researched three investment companies as possible investment managers for WASFAA. Identified one as a strong candidate and will continue to work with this company and arrange a meeting with EC at the June meeting.
- 2.) Asset inventory continually kept up to date.
- 3.) Reviewed and finalized fiscal year 2005 WASFAA budget.
- 4.) Established fiscal year 2006 WASFAA budget. Approved by EC.
- 5.) Beginning the formation of the 2007 fiscal WASFAA budget

Approved Budget Breakdown and Actual Expenditures to Date:

Approved budget is \$1,000.
Actual Expenditures to date: \$00.00

Progress Toward Strategic Plan Goals/Activities:

Goal #6c Budget comprised of more diverse sources of revenue. The treasurer and chair of fiscal planning have worked to establish more diverse sources of revenue not based upon fund development: joblinks, interest income, income from training activities (conference, fall & spring training, summer institute, management leadership institute) and membership dues.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Work closely with the fiscal planning committee members on fiscal concerns of the organization.

Review monthly treasurer reports.

Committee Name/Officer: Research Committee

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Committee Members (Name/Place of Employment)

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CSU - Chico

Logan, Bert R
Director of Student Financial
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Lane Community College

Dill, Virginia A
Director OF DOE Oversight
Lincoln Educational Services

VanHove, Jeannie M
Program Coordinator
Tacoma Community College

Kibarian, Cheryl A
Regional Director, Business
Development
National Student Loan Program

Wieger, Erica A
Financial Aid Director
Metropolitan College

Goals:

The goals of the Research Committee were to re-establish the committee as a viable WASFAA Committee, recruit research projects of interest to WASFAA Membership, Survey WASFAA Membership on various financial aid or WASFAA related topics, assist Executive Council and WASFAA Committee Chairs in with surveys and to have a web page created to assist with these goals.

Activities:

We have provided information to begin the WASFAA Research Web page, we have surveyed WASFAA Membership about office training and development activities, we have contacted professors in the region to get on the message about the WASFAA Research program, we have contacted membership about Research Program and we are sponsoring a WASFAA Pre-Conference Workshop on assisting financial aid offices on where to use and find financial aid data and how to put together reports for their schools.

Approved Budget Breakdown and Actual Expenditures to Date:

We have yet to spend any of our budget, but will be spending funds for the WASFAA Pre-Conference Workshop.

Progress Toward Strategic Plan Goals/Activities:

We have worked on Goal 2 Number 7.

Suggestions for Committee Chair/Co-Chair or Officer Successor: None

Committee Name/Officer: Conference Committee

**Committee Chair/Co-Chair/Officer
(Name/Place of Employment/Address/Phone/Email):**

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Committee Members (Name/Place of Employment)

Kim Naig – ColLEDGE Loans
Kim Schreck – Student Capital
Andy Promsiri - UCLA
Ben Loya – College Loan Corporation
Tip Ryan - NELA
Steve Herndon – California State University, Bakersfield
Peter Miller – Alaska Pacific University

Goals:

1. Create an environment in which participants can increase their professional growth by networking and collaborating with fellow participants.
2. Provide essential training through relevant sessions to enhance participants' professional development.
3. Use innovative concepts to reach specific targeted groups who have not typically attended the conference in the past.
4. Have a fiscally sound conference.

Activities:

1. Conference committee met to develop a well rounded program. They identified approximately 60 session topics which they turned over to the program committee to select the final sessions, presenters and moderators.
2. The program theme “Financial Literacy” will provide numerous professional development opportunities for our attendees.
3. Sent a number of personalized electronic communications to all active and non-active members in the database.

4. Working towards a fiscally sound conference by closely monitoring all conference related expenses.

Approved Budget Breakdown and Actual Expenditures to Date:

Total Budget: \$105,000

Breakdown:

Food - \$70,500

Printing - \$10,100

Entertainment - \$8,250

Committee Expenses - \$7,000

Misc. - \$9,150

Expenditures:

\$3471.01

Progress Toward Strategic Plan Goals/Activities:

The net income received by the conference will be used by the association for future WASFAA activities.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

1. Closely monitor expenses.
2. Be prepared for delays outside your control.
3. Expect the unexpected.
4. Good Luck!!

Committee Name/Officer: Strategic Planning Committee

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Catherine King-Todd, Thunderbird – The Garvin School, AZ
Janell McIntyre, Charter College, AK
Peter Miller, Alaska Pacific University, AK
Doug Severs, Idaho State University, ID
Frank Silva, University of Hawaii at Manoa, HI
Leonard Walker, University of Nevada - Reno
Lana Walter, Northwest University, WA
Jim White, Seattle University, WA

Goals:

The goals of the WASFAA Strategic Planning Committee for the 2005-06 year included the following:

1. Confirm WASFAA's mission, core values, and goals for the 5-year Strategic Plan for the period 2005-2010
2. Identify strategies, action plans, and assessment measures for each of the Strategic Plan goals
3. Ensure WASFAA Committee/Activity goals for the 2005-06 year link with the Strategic Plan goals
4. Review and incorporate the WASFAA Long-term Asset Reserve/Investment Strategy into the 5-year Strategic Plan
5. Finalize the 5-year Strategic Plan document and communicate it to the WASFAA membership

Activities:

Members of the Strategic Planning Committee worked very closely this year with Gayle Northrop, the WASFAA Strategic Planning Consultant, to finalize the WASFAA 5-year

Strategic Plan, which was approved by Executive Council at the 11/17-18/05 meeting in San Francisco, CA. Throughout much of the year committee members have been focusing their attention on the document which summarizes the agreed to plans for finalizing and monitoring implementation of the Strategic Plan. The Measures and Tracking Tool has been used to identify those Executive Council members and Committee Chairs/Co-Chairs who should be working on the strategic plan data gathering process. The bulk of this work has been completed and will hopefully be finalized prior to the final Strategic Planning and Executive Council meetings prior to the annual conference.

In addition, a WASFAA 2005-10 Strategic Plan article was prepared for publication in the final WASFAA Newsletter for the year, which will be provided in hardcopy format to the membership as part of the conference registration packet.

Approved Budget Breakdown and Actual Expenditures to Date:

Approved budget is \$8,200. Actual expenditures to date are \$5,720. Additional expenditures are anticipated for the printing and binding of 100 copies of the WASFAA 2005-2010 Strategic Plan to use at the upcoming Transition Meeting and to share with other interested parties.

Progress Towards Strategic Plan Goals/Activities:

The following lists progress since the last Strategic Planning Committee quarterly report:

With regard to Goal #7c. (Regularity of newsletter publication and communication from President), consecutive monthly electronic WASFAA Highlights were produced by the WASFAA President and posted to the WASFAA listserv and website for the benefit of the membership, starting with the month of April, 2005.

With regard to Goal #8c. (Committees and Officers develop and report on annual goals), the President has revised the WASFAA committee and officer year-end report template to incorporate a section for reporting on annual goals.

With regard to Goal #8d. (Quarterly reports and year-end reports include update on progress against strategic plan goals/activities), the President has revised the WASFAA committee and officer quarterly report and year-end templates to incorporate a section for provision of an update on progress towards the strategic plan goals/activities.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Continue the regular review and monitoring of the 5-year Strategic Plan and report progress to the Executive Council. Work with the President to ensure that WASFAA Committee/Activity goals for the 2006-07 year link with the Strategic Plan goals.

Committee Name/Officer: Sister Dale Brown Summer Institute

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

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Goals:

The mission of the 2006 SDSi is to provide intensive training to financial aid administrators with all levels of experience. The emphasis will be given to those who are newly hired with 2 years of experience or less. The sessions will be held at the campus of the University of California, Los Angeles.

- Courses will be conducted by high level financial administrators with at least 10 years of experience.
- Increase the number of attendees. The targeted number will be around 150 participants. A large portion of the student population will be commuting since UCLA is centrally located in the Los Angeles area. Thus anticipating the event will be the largest institute WASFAA has conducted.

Activities:

1. Select site and faculty members.
2. Develop training materials
3. Assign topics to the instructors.
4. Develop budget proposal.
5. Develop registration information on the web.

Approved Budget Breakdown and Actual Expenditures to Date:

It is anticipated that at the conclusion of the 2006 Summer Institute we will bring in \$99,500 of the income. The overall estimated expenditures will be around \$94,000. This leaves us with approximately \$5000 profit. As far as the actual expenditures to date—this information is not currently available.

Progress Toward Strategic Plan Goals/Activities:

We are currently making great progress toward achieving our goals and activities. As a matter of fact, we are ahead of schedule. We have accomplished the following:

1. Faculty members have been selected.
2. Curriculum has been developed.
3. Training materials have been ordered.
4. Conference information and the agenda have been posted on the web.
5. The Committee primary objective is to accommodate additional participants this year than any other years.

Suggestions for Committee Chair/Co-Chair or Officer Successor: Assess the curriculum each year to determine if it should be revised. In 2006 the curriculum was designed using the Federal Student Aid Handbook with the NASFAA Core as a resource rather than the other way around. In addition a Case Study was added as reinforcement of the basic teaching. Recommend a back up for each session to ensure coverage and in case of emergency.

Suggest timely receipt of all presentations for reproduction and assembly of packets for students. Timely meetings with faculty and give clear direction and expectations.

Committee Name/Officer: Pacific Financial Aid Association - PACFAA

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Jeff Scofield, President 2005-2006

Goals:

1. Expand College Goal Sunday activities to the neighbor islands
2. Support and promote WASFAA and NASFAA training activities
3. Offer excellent 2006 PacFAA Conference
4. Complete site selection for 2007 PacFAA conference

Activities:

1. Expanded College Goal Sunday activities from 3 sites on Oahu to also include 2 sites on the Big Island. Over 200 attended the Big Island events with over 800 attending the Oahu events.
2. Large attendance at fall PacFAA hosted, WASFAA sponsored NASFAA training. This also produced a large increase in WASFAA members from the PacFAA area.
3. The 2006 PacFAA conference will be held March 20-21, 2006 in Honolulu. Also, in conjunction with the US Department of Education, two additional days of training will be held before and after the conference for members from the Pacific Islands.
4. During the fall, a contract was signed for the 2007 PacFAA conference. It will be held on the Big Island April 1-2, 2007 at the Hapuna Beach Prince Hotel. This will be the first PacFAA conference to be held on the Big Island and only the second time in PacFAA's 30+ year history that the conference will be held off Oahu.

Other:

Financial Aid Nights were held at a record 57 locations during 05-06. Over 4000 sets of materials were distributed.

Elections for 06-07 officers are currently being held. Results will be announced at the conference in March.

Fund Development has exceeded last year's results by almost 50%.

Committee Name/Officer: Membership Committee

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Wendy Olson
Whitworth College
300 W Hawthorne Rd
Spokane WA 99251

509-777-4306
509-777-4601 (fax)
wolson@whitworth.edu

Committee members:

Anderson, Joyce – Boise Bible College, ID
Aurenz, Diane – Chela Education Finance, AZ
Colasurdo, Kathy – Bellevue Community College, WA
Herndon, Mark – CSU, Bakersfield, CA
Lackey, Jeff – Student Loan Finance Association, WA
Scott, Johnetta – University of Alaska, Anchorage, AK

Goals:

1. Explore the benefits of institutional membership for WASFAA members and WASFAA with the Fiscal Planning Committee, as requested by the Strategic Planning Committee.
2. Increase the number of current members for 2005-6. This can be accomplished through a strong training program and also by sending out reminders to those members who have not yet renewed their membership for 2005-6.
3. Provide statistical information to the Executive Council on the membership.
4. Assist Peter Miller, Treasurer, with his efforts to clean up the database.

Activities:

1. Processed membership checks and maintained membership data.
2. Worked with ATAC to make sure that there were not duplicate membership invoices.
3. Contacted committee chairs and members that are not current members and asked them to pay their membership dues for 2005-6.
4. Sent out monthly membership reports to the President and Past-President.
5. Contacted those with outstanding membership invoices and reminded them that payment was required.
6. Worked with other committee chairs to make sure that the database was kept current when they received payment for my invoice or vice versa.
7. Assisted members with questions they had about their membership.
8. Worked with Membership Committee members to clean up erroneous information in the institution database. A number of schools were tagged as proprietary incorrectly.
9. Researched the advantages and disadvantages of having an institutional-based membership rather than our current system of individual-based membership. Based on the research, recommended to the Executive Council to continue to have an individual-based membership.

10. Requested ATAC to revise how we collect the membership's ethnicity data, so that the membership must select an option before leaving the screen. This will provide better information for the Executive Council.
11. The membership was asked to update their current profile so that it is accurate.

Approved Budget Breakdown and Actual Expenditures to Date:

The 2006 budget for the Membership Committee is \$100 and of it \$37.00 has been spent for postage reimbursement.

Progress Toward Strategic Plan Goals/Activities

Goal 1c: Increase in number of members participating in Association activities/events. In March, 2005 our current membership was 1309. Today, it is 1433. Members usually pay dues/renew their membership when they want to participate in WASFAA's activities so these numbers confirm that participation is increasing.

Goal 4a: Increase in membership diversity. The number of members who specified an ethnic choice other than white/Caucasian was 334 in March, 2005. This year that number is 403.

Goal 5a: Increase in number of WASFAA members. See Goal 1c above.

Goal 5b: Increase in number of members at annual conference, training events, etc.: Peter is best able to provide this information.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Continue to use the Membership Committee members to assist with keeping the database current. Use their ideas to consider ways to continue to increase membership numbers.

WASFAA Membership Statistics March 1, 2006	
Current Membership	
Total	1433
Membership Expiration Date	
No Membership Date	396
4/30/2002	309
4/30/2003	223
4/30/2004	399
4/30/2005	526
4/30/2006	1134
4/30/2007	299
Members Not Renewed from Last Year	
Total	526
New/Renewal Memberships	
2005-2006 New Memberships	1148
2005-2006 Renewal Memberships	213
Membership by Year	
2005-2006	1361
Institutions with Current Memberships	
Total	437
Membership by State	
Alaska	49
American Samoa	2
Arizona	217
California	502
Federated States of Micronesia	0
Guam	3
Hawaii	63
Idaho	62
Marshall Islands	0
Nevada	62
Oregon	174
Washington	202
Out of Region	97
Membership by Affiliation	

Not Specified	3
Active	1305
Associate	109
Lifetime	16
Membership by Ethnicity	
Decline to Answer	517
Other	20
American Indian/Native American	26
Asian/Pacific Islander/Filipino	116
Black/African American	62
Hispanic/Chicano/Mexican American/Latino	179
White/Caucasian	513
Membership by Gender	
Not Specified	19
Male	371
Female	1043
Membership by Institution Type	
Not Specified	82
Other	34
Public (2 Year)	356
Public (4 Year)	349
Independent (2 Year)	1
Independent (4 Year)	139
Proprietary (Business School)	1
Proprietary (Technical/Trade)	105
Health Related/Nursing	0
Graduate/Professional	32
Consultant	1
Government Agency	2
Guaranty Agency	116
Lender	198
Secondary Market	6
Servicer	11

Committee Name/Officer: Site Selection

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Leonard Walker
University of Nevada, Reno
MS 076
Reno, NV 89557
lrwalker@unr.edu

Committee Members (Name/Place of Employment)

Jim White
Seattle University

David Levy
CAL-TECH

Goals:

Goals are to locate places and assist in the planning of WASFAA EC meeting, find locations for future Jerry Sims MLI and the WASFAA Sister Dale Brown Summer Institute.

Activities:

Locations for future EC meetings are:

- March 16-17, 2006 The Resort Coeur d'Alene, ID\$99.00
- June 29-30, 2006 Doubletree Hotel UCLA.....\$125.00
- November 16-17, 2006 Hyatt Orange County, CA.....\$99.00
- February 8-9, 2007 The Benson Portland, OR\$110.00

Location for Jerry Sims MLI 2006 October 25,26,27

- The Resort Coeur d'Alene, ID\$99.00
- Sister Dale S.I. 2007 - Boise State University

Approved Budget Breakdown and Actual Expenditures to Date:

\$1,000 BUDGET/ \$0 SPENT

Progress Toward Strategic Plan Goals/Activities:

GOALS COMPLETED!!!!

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Keep the rates for room nights down for EC meetings, have easy access to/from airports to meetings/events. Great locations! Great rates! ☺

Committee Name/Officer: Washington State Association - WFAA

Chair/Co-Chair/Officer (Name, College or Employer, Address, Phone, Fax and Email):

Carla Idohl-Corwin, President
South Puget Sound Community College
2011 Mottman Road SW
Olympia, WA 98512
Email: ccorwin@spscc.ctc.edu
Ph: 360-596-5235
Fax: 360-596-5712

Goals:

1. Find creative ways to increase visibility with constituents and enhance connections with state and political officials.
2. Outreach to new members and foster leadership within WFAA.
3. Review student and member scholarships to increase subsidized training opportunities and more educational scholarships.
4. Improve coordination of training with other associations and agencies.
5. Complete a statewide online student expense survey, utilizing the 2003-04 survey template.

Activities:

The WFAA VP for legislation, Steve Seeman, has kept membership apprised of legislative issues at the state and federal level pertaining to financial aid and higher education related matters. Additionally, the Executive Committee met with legislators and legislative staff at their Winter meeting in Olympia, Washington to promote awareness of financial aid issues and to create a connection to the Association. The goal is to establish relationships so that legislators and staff will rely on this connection when drafting new policy and programs and seek input from WFAA.

Our total membership for 2005-06 has increased by 10% to just over 500 paid members. We attribute this to the success of the conferences and trainings that have been provided to our membership. Additionally, we are utilizing members who have indicated an interest to volunteer for various committees and task forces. This effort will continue for the 2006-07 year as we establish the committees.

For the 2005-06 award year, WFAA dedicated \$10,000 to fund student scholarships. The awards were made to 10 students attending community colleges, universities and technical colleges. This is a record for WFAA and a tradition we hope to continue. Additionally, the Association subsidized the registration fees for all members attending the Fall conference, making the registration fees more affordable and allowing more members to attend our outstanding conference. The Association also funded member scholarships to attend the Fall Conference for one new person who had not previously attended (or the "newbie" as it is called) and also for one ethnic scholarship attendee. We provided a scholarship for one

member to attend the Management and Leadership Institute and will also provide one scholarship for a member to attend the Sister Dale Brown Summer Institute.

The training committee, chaired by Brian Shirley, VP for training, is currently working on the next workshop topic(s) for the Summer, 2006 training sessions. The committee has moved the sessions from June to July to allow more members to attend based on office commitments and hectic schedules. The committee is also in the process of having training registration be completed entirely on-line.

Our student budgets committee, chaired by Cheryl Reid from Peninsula College, is diligently working on the implementation and completion of the second on-line student expense survey to be conducted statewide. This survey will mirror the on-line survey completed in 2003-04 and provide valuable feedback for the creation of the 2007-08 student budgets.

NEW VENTURES

WFAA members are serving on various committees and taskforces in partnership with agencies, legislative staff and businesses in our state. One initiative is the WFAA Outreach Task Force, consisting of representatives from schools, guarantors, state oversight agency representatives and lenders. This task force was created to review current materials provided to students and families about higher education and financial aid opportunities. The goal of this committee is to review what materials are already available and to create a more clear, concise, consolidated publication that can be distributed statewide.

WFAA members are serving in partnership on some new initiatives in our state. A very innovative project that is underway is the Washington State Scholarship Coalition Project. The goal of this project is “increase access to scholarships for Washington students by providing an easy and uniform scholarship locator and application process. It will also provide donors with information on effective, efficient ways to contribute”. This vision of this project is a single portal. The program is in the initial planning and research stages and includes partners from WFAA, the Washington Higher Education Coordinating Board, the Pride Foundation, The Seattle Foundation, College Planning Network, Seattle Public Schools, The Seattle Times, Educational Assistance Foundation, Northwest Education Loan Association, Northstar Consulting, and Washington Dollars for Scholars with additional members being added as appropriate.

College Goal Sunday 2007 is another exciting event that our state has undertaken. The lead agency, Northwest Education Loan Association (NELA), is working diligently with a committee with representatives from WFAA, the lending community, the Higher Education Coordinating Board, statewide mentoring program staff and GEAR UP staff. It is anticipated that WFAA members will provide vital assistance in the implementation of this program.

CONFERENCE 2006

The Washington Financial Aid Association Conference for 2006 will be held in Vancouver Washington at the Vancouver Hilton October 18 – 20, 2006. The Conference theme is “Exploring New Frontiers” as we forge ahead during Reauthorization and the Budget

Reconciliation impacts. If you are interested in attending our conference, visit our website at www.wfaa.org in July or August for more information.

Progress Toward Strategic Plan Goals/Activities

WFAA has numerous members who are also active on the WASFAA Executive Committee and a variety of WASFAA committees. This heightened participation increases the awareness, visibility and connection for WFAA members who are interested in also being WASFAA members.

Committee Name/Officer: Nevada State Association

Committee Chair/Co-Chair/Officer (Name/Place of Employment/Address/Phone/Email):

Renée Baker
Scholarship Coordinator
Truckee Meadows Community College
Reno, NV 89512
(775) 674-7672
(775) 674-7566
rbaker@tmcc.edu

Goals:

As a new state president, I was not long into office before I realized I needed to realign the goals announced in my June state report to the WASFAA EC. Here are the goals I revised in early 2005-2006.

1. Offer a state conference that is engaging for NAFAA members at all levels of experience, with multiple training opportunities.
2. Develop and adopt an official NAFAA policies and procedures document.
3. Fine-tune membership tracking from year to year.
4. Offer a pre-planned/pre-announced slate of scholarships to members.
5. Support/market training offerings from WASFAA, Ed and lenders.
6. Volunteer as an organization to assist with the 2005 WASFAA conference.

Activities:

1. State meeting @ WASFAA conference in April (Portland)
2. Executive Board transition meeting in May (Reno)
3. 2005 NAFAA Conference at Harvey's Lake Tahoe (Stateline, NV)
4. Teleconferences in July & October

Progress Toward Strategic Plan Goals/Activities:

As a state officer, my goals were primarily state goals. However, as a member of the WASFAA executive council, I attempted to mesh my goals with WASFAA goals to the extent possible.

1. Our state conference was the most successful yet, with the highest attendance ever (120). We were successful in reaching our goals for this conference, due to the hard work of our conference committee and, in particular, to the tireless efforts of Conference Co-Chair Paige Hurley. We made every effort to complement, rather than duplicate the WASFAA fall training offering. [Strategic Plan goal #1]
2. We are currently at work on a policy and procedures manual, although it will probably still be a work-in-progress when the next president takes office May 1. We feel very fortunate to have WASFAA as a model for this process. Serving on the WASFAA executive council has demonstrated to me how vital a P&P is.

3. Our membership tracking has improved during 2005-2006, and a reasonable process has been created which can be handed over to the incoming membership chair.
4. Although progress was made in the area of NAFAA scholarships, there is still a way to go. We are at work on a planning calendar, to include the dates surrounding marketing and awarding of scholarships. In addition to the WASFAA-sponsored scholarship, we are funding 2 scholarships to the NAFAA conference. [Strategic Plan goal #1 and #5]
5. We did make efforts to market WASFAA training this year, with mixed success. We will continue our efforts, utilizing the website and list serve and explore other options to publicize opportunities for training located in our state. WASFAA spring training is coming up at Truckee Meadows Community College in Reno on April 25. [Strategic Plan goal #1]
6. Several NAFAA members are currently volunteering in various capacities for the April conference in Reno. We have also offered our services to fill in wherever needed for conference registration. [Strategic Plan goal #1 and #5]

Suggestions for Committee Chair/Co-Chair or Officer Successor:

First and foremost, I would recommend that future NAFAA presidents take full advantage of opportunities to participate on the WASFAA EC. It is really crucial that state presidents attend the EC transition meeting to become acquainted with the workings of WASFAA and the purpose of serving on the WASFAA board. The addition of state presidents' meetings prior to the EC meetings will also play a large part in allowing state presidents to become familiar with WASFAA. I have great respect for WASFAA and think it will only grow and improve with earlier and increased involvement from the state presidents. By the same token, what state presidents learn from WASFAA and their counterparts in other states will help their own organizations become stronger.

Committee Name/Officer: Historical Archives

Chair/Co-Chair/Officer

Renee Baker
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7000 Dandini Blvd/RDMT 315C
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Goals:

1. Bring history up to date by compiling summary information of key events from the past several years.
2. Continue to share history of the Association to membership via the newsletter.
3. Transition committee responsibilities so that a new chair may assume the duties of his committee for 2006-07.
4. Maintain paper and electronic records of the Association.

Activities:

The primary activity for the year has been to prepare for the transition of the archive records. This meant a significant amount of time organizing and formatting the records so information will be readily accessible to the new chairperson.

Approved Budget Breakdown and Actual Expenditures to Date:

\$810 was approved for Historical Archives expenditures for 2006.
To date, \$633.05 has been spent

Progress Toward Strategic Plan Goals/Activities

Significant progress has been made toward compiling data for key events such as conferences and scholarship awards.

The electronic storage process is working well.

Transition of the Association records is on schedule.

Suggestions for Committee Chair/Co-Chair or Officer Successor:

Considering that electronic storage and formatting seems to be working well, I think a major focus for the next few years will be to expand the information in the history of WASFAA.

One way to approach this might be to have past presidents report one significant activity during their term of office and how they think it contributed to the Association's growth and development.