

May/June/July  
2006



# Newsletter

*A publication of the Oregon Association of Student Financial Aid Administrators, a not-for-profit membership organization*

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## President's letter

Greetings! Thank you for taking the time to look over our first newsletter of 2006. One of my goals this year is to increase communication with the membership through projects such as this newsletter and updates from the President like the one posted on the website in February.

My recent travels to WASFAA meetings and the State President meetings gave me wonderful opportunities to talk to colleagues from other state organizations in our region about budgets and reserves, membership options, insurance and survey instruments, all things I hope to gather more information on and share with the executive council. I appreciate the opportunity to represent Oregon.

At our last executive council meeting, I formed an ad hoc committee to look at site selection for our annual conference. Inside this issue you will find counter arguments on the issue of the conference site. Please take the time to consider each writer's fine points. Some of the other gems you will find include an update on College Goal Sunday, a legislative report and a review of the two new grant programs created with the passing of the Deficit Reduction Act S1932.

Co-Chairs of the annual conference, Suzie Petersen and Cindy Pollard, will soon be forming their committee. Currently they are reviewing volunteer applications; it is not too late to show your interest. If you have never been on the committee, please consider volunteering.

I appreciate everyone who took time to contribute to this issue and a special thanks to our Secretary, Sue Shogren from University of Portland, for taking this endeavor on. If you would like to contribute to the next issue, please contact Sue or me.

It was good to see some of you at the WASFAA annual conference in Reno. I hope to see many of you this summer at the OASFAA Summer Drive-In. Please stay tuned for details from the Co-Chairs Kathy McCutchen and Mary Jo Jackson.

Respectfully submitted,  
Tracey

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## Editorial Policy

Opinions expressed in this newsletter are those of the authors and not necessarily of OASFAA, its members, or the institutions represented by the authors.

OASFAA welcomes all views and invites members to submit for publication articles, essays, photographs, or information of general interest to all members. Submissions should be brief and may be edited. It may not be possible to publish all articles submitted. Email items for publication to: shogren@up.edu.

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# Letter from the Editor

by Susan Shogren, University of Portland

It is so exciting to see this first issue of the new **OASFAA Newsletter** come together! Many people have contributed their effort and shared their enthusiasm for getting a newsletter started again, for which I am very grateful. Special thanks to Tracey Lehman, Donna Fulton, Julia Reisinger, and Kathy Campbell, for their ideas and advice. I'm looking for volunteers to help work on future issues!

We expect to issue the newsletter quarterly, during February, May, August and November. Future issues will include updates from Segmental VP's and Committee Chairs, member news and profiles, and information about the newest members of OASFAA. I encourage members to submit news items, articles, announcements, photographs, opinions, compliments, requests and suggestions. Member organizations are welcome to submit paid advertisements, as well. Consider the deadline for submission to be the end of the month prior to publication.

I hope you find the newsletter informative and interesting. More importantly, I hope you will begin to view the newsletter as *your* resource for finding out about the issues that matter to you and for sharing what you know matters to your colleagues in the Oregon financial aid community.

Have a great summer!

## OASFAA Facts

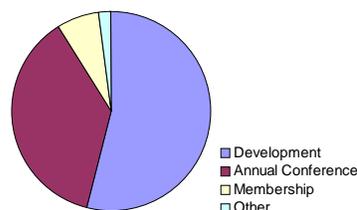
### Membership:

Total	351
Oregon	276
Out-of-State	75
Institutions represented	100
Voting members	239
Affiliate	111
Other	1
Female	259
Male	80
Not specified	12

### Income:

Development	54%
Annual Conference	37%
Membership	7%
Other	2%

OASFAA Income Sources



## Get Involved

One of the best ways to benefit from membership in OASFAA is to volunteer on a committee. You will meet other members, get to know some of your colleagues better, and find out more about OASFAA. There are many ways to volunteer and get involved:

- Legislative/Federal Issues Committee
- Annual Conference Committee
- Awards Committee
- Development Committee
- Technology Committee
- Training Committee
- Support Staff Workshop Committee
- Summer Drive-In Committee
- FA 101 Committee
- OPB Broadcast/Phone Volunteer

Committee Chairs are usually chosen by the President before or at the annual conference in February. They agree to assume responsibility for the overall planning and successful accomplishment of various events and projects. Appointments usually are for one year, but every effort is made to carry forward at least one Chair.

Committee members are selected by Committee Chairs later, depending on the goals of the committee or date of the activity, etc. Members agree to help Chairs plan and implement various events or projects, often by volunteering to take care of one aspect of an event or project. For example, one person might volunteer to arrange facilities and meals for a workshop, while another might volunteer to plan a workshop session.

Volunteer Forms are available at the annual conference in February or online anytime at [www.oasfaaonline.org](http://www.oasfaaonline.org). For more information about how you can get involved, contact Tracey Lehman, OASFAA President.

# Federal Issues: Reconciliation and Reauthorization

by Susan Degen, OSAC

On February 8, 2006, the President signed into law the Deficit Reduction Act, (PL 109-171). One section of the law, the **Higher Education Reconciliation Act (HERA) of 2005**, includes higher education provisions from earlier House and Senate reauthorization bills. The law passed by narrow margins (216 to 214 in the House, 51 to 50 in the Senate), and there's debate about its legitimacy, but we assume it will stand. Two recent Dear Colleague Letters – GEN-06-02 on loan program changes and GEN-06-04 on new grant programs – provide additional guidance.

## Key changes effective July 1, 2006:

Need Analysis: changes may require a FAFSA addendum and recalculations	
Independent Student	adds students on active duty for other than training
Simplified Needs Test	for applicants receiving benefits from a means-tested federal benefit program within the last 12 months (e.g., TANF, food stamps, WIC), dependent students and independents with dependents qualify for simplified needs test and, if AGI is \$20,000 or less, for auto-zero EFC; others qualify just for needs test
Assets	529 plans counted as assets (parent asset for dependent students); all asset conversion rates reduced; net value of family-owned and controlled small businesses excluded if 100 or fewer full-time employees or FTEs
Estimated Financial Aid (EFA)	excludes non-Title IV state assistance that offsets a specific component of COA (e.g., voc rehab to cover tuition)
Cost of Attendance (COA)	for students enrolled less-than-half-time, includes room and board for 3 semesters or equivalent, but only 2 can be consecutive; COA may now include one-time cost of obtaining first professional license or credential
Drug Offenses	considered only if student convicted of an offense that occurred while the student was enrolled and receiving Title IV aid

Academic Competitiveness Grants (ACG): new grant programs for Pell-eligible students	
<ul style="list-style-type: none"> <li>▪ ED will notify potentially eligible students, who must self-certify eligibility at a special website; institutions will confirm students' eligibility</li> <li>▪ ACGs for 1st and 2nd year Pell-eligible students who completed "rigorous" secondary school program; requires 3.0 GPA for 2nd-year students</li> <li>▪ SMART grants for 3rd and 4th year Pell-eligible students who major in sciences, technology, engineering, and certain foreign languages (ED to provide list of CIP codes); requires 3.0 GPA in coursework for the major</li> </ul>	

Loans: changes below are for July 1, 2006; new loan limits are effective July 1, 2007	
Interest Rates	fixed 6.8% for Stafford, fixed 8.5% for PLUS (7.9% for Direct PLUS)
Loan Fees	return of 1% "default" fee; phase-out of origination fees by 2010
Borrower benefits	more parity between FFELP and DL
Graduate PLUS loans	opens PLUS to graduate/professional students, same rules
Military deferment	FFELP, DL, Perkins loans first disbursed on/after July 1, 2001
Disbursement waivers	restores multiple- and delayed-disbursement waivers for schools with default rates below 10% for the most recent 3 years
Consolidation loans	retains single-holder rule, eliminates spousal consolidation and in-school consolidation

## Reauthorization of the Higher Education Act of 1965 (HEA)

The House's reauthorization bill, H.R. 609, the College Access and Opportunity Act of 2005, and the Senate's reauthorization bill, S. 1614, the Higher Education Amendments of 2005, are both stalled. However, since many budget-related provisions were included in the FFY 2006 budget reconciliation bill, perhaps the rest of the HEA will finally be reauthorized in 2006!

## Newest Acronyms: ACG & SMART

by Tracey Lehman, Oregon Institute of Technology

On February 8, 2006, the President signed the Deficit Reduction Act of 2002, S. 1932. Part of the act included two new grants for 2006-2007: the **Academic Competitiveness (ACG) Grant** and the **Science and Mathematics Access to Retain Talent (SMART) Grant**. Questions continue to accumulate but here are the most recent updates from Jeff Baker at the Department of Education. Jeff spoke to the western region of financial aid administrators in **April**.

Both grants require US citizenship, full-time enrollment and eligibility for Federal Pell Grant. These grants cannot cause the student's aid to exceed Cost of Attendance and cannot replace the EFC.

The ACG is aimed at recent high school graduates: first- and second-year students enrolled in a two- or four-year degree program that have not previously been enrolled in a program of undergraduate education. The grant is for students who have completed a rigorous high school curriculum. Second year students must have a minimum GPA of 3.00. Awards are \$750 for the first year and \$1,300 for the second year.

The tentative process for ACG is that FSA will notify the student of potential eligibility. The student will be directed to a web site, where he or she will self-identify as potentially eligible by looking up their state to check curriculums. FSA then informs the schools of each student's potential eligibility, and in turn the school confirms and documents eligibility (by looking at the high school transcript, for example). Schools award students and use the COD system to draw down payments.

According to Jeff Baker, at this point the Education Secretary is working with Governors and States to determine the definition of "rigorous curriculum."

The SMART Grant is for third- and fourth-year students enrolled in a four-year degree program who are majoring in science, computer science, technology, math and certain designated foreign languages. Majors will be listed on a website by Classification of Instructional Programs (CIP) code. Students will need a 3.00 minimum GPA. The award amount is \$4,000. Schools will need to determine who is eligible at their institution and award accordingly.

Participation in these programs is mandatory for schools. Both programs are funded for five years. \$790 million is budgeted for 2006-2007. It is frustrating that there are so many unanswered questions about these programs at this point. Implementation will undoubtedly challenge the admissions and registrars offices, as well financial aid. Additional information will be provided from FSA by way of Dear Colleague Letters, Electronic Announcements, Final Regulations, and On-Line Training this summer and Fall Training.

"ED budget estimates show 60% to 80% of first- and second-year qualifying Pell Grant recipients will be eligible for more grant aid under the new Academic Competitiveness program."

*NASFAA Today's News  
for March 14, 2006  
[www.nasfaa.org](http://www.nasfaa.org)*

## ED Guidance on New Grant Programs

- March GEN-06-02  
Enactment of the Higher Education Reconciliation Act of 2005 ("the HERA"), Pub. L. 109-171 (Rev. March 14, 2006)
- March GEN-06-03  
Correction to Dear Colleague Letter GEN-06-02, FP-06-01
- April GEN-06-04  
Academic Competitiveness Grant and National Science and Mathematics Access to Retain Talent (SMART) Grant Programs
- May 2 GEN-06-06  
National SMART Grant – Announcement of Eligible Majors
- May 3 GEN-06-08  
Additional Implementation Guidance--Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (National SMART Grant) Programs

*source: U.S. Dept. of Education IFAP  
[www.ifap.ed.gov](http://www.ifap.ed.gov)*

- May Final regulations for ACG/SMART Grants expected to be published
- June 1 Deadline for states to submit alternate rigorous program (0607)
- June Notice of rigorous programs recognized (0607)
- July 1 Potential recipients notified to submit additional information to ED to determine eligibility
- Fall '06 Institutions verify student eligibility using records of high school performance; aid disbursed

*source: U.S. Dept. of Education  
[www.ed.gov/about/inits/ed](http://www.ed.gov/about/inits/ed)*

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## NASFAA Says...

"... NASFAA is committed to helping you implement this complex piece of legislation. However, we need your feedback. Please send to

*[GovtAffairs@NASFAA.org](mailto:GovtAffairs@NASFAA.org)*

any questions, comments, insights or concerns you have for our discussions with the Department."

*NASFAA Today's News  
for Tuesday, April 18, 2006*

# State Issues in Oregon

by Susan Degen, OSAC

## Access and Affordability Working Group (AAWG)

Convened in Spring 2004, the AAWG's activities have occurred in two phases: Phase I focused on the 2005 legislative session and Phase II focuses on policy development for the 2007 legislative session. Appointed by the Governor, members include representatives from the state Board of Higher Education, private businesses, students, labor, institutions, and other interested parties.

### Phase I: 2005-07 Oregon Opportunity Grant (OOG) Increases

The first phase helped secure an unprecedented increase in state funding for the OOG, administered by the Oregon Student Assistance Commission.

### Phase II: Next Steps

For the 2007 legislative session, the AAWG is developing a new "Earned Opportunity" model. Under this new model, a student should be accountable for contributing a substantial amount to his or her education. The substantial portion will be based on what a student could be expected to reasonably earn by working full-time over the summer and part-time during the school year. The student's family would be expected to pick up the remainder. For families with demonstrated financial need, Federal Pell Grants for lower-income students and federal tax credits for middle-income students would lower the family's expected contribution. The State of Oregon would fill in the remaining gap.

The AAWG invites financial aid directors from private and public post-secondary institutions to a discussion of the basic principles and concepts behind the "Earned Opportunity Model" policy proposal for the 2007 legislative session. The meeting will be held on **Tuesday, May 9, 2006** from 10:00 a.m. to 12:00 p.m. at the George Fox University, Portland Center, at 12753 SW 68<sup>th</sup>.

## Academic Excellence & Economic Development Working Group

Also known as the "more-better-faster" group, AEED is addressing eleven potential opportunity areas in which to identify and develop initiatives that build on the program excellence in Oregon's universities and community colleges. The "Opportunity Areas" reflect potential business, education, and research opportunities that will be explored as possible areas for future Board initiatives.

For documents by these two working groups, see: [www.ous.edu/sb\\_work.htm](http://www.ous.edu/sb_work.htm)

## OSAC legislative concepts

For the 2007-09 biennium, OSAC has submitted legislative concepts on the following topics for approval by the Governor's Office:

1. Office of Degree Attainment (ODA) Process and Standards revisions - make technical and minor substantive changes to the degree-use statute.
2. ASPIRE, Phase II - establish ASPIRE in statute in order to make services available to every Oregon high school student, facilitate state support, demonstrate that support to current granting organizations, and stabilize the program for the long term.
3. Oregon Opportunity Grant - placeholder for Governor's potential action; expected changes to award parameters based upon AAWG recommendations.
4. Donor Matching Programs - allow and encourage private donors to contribute to a scholarship system that would meet a greater portion of student need, especially for families and students who are not in the lowest economic strata; OSAC would offer state matching funds to leverage private donations to create permanently endowed scholarships and to establish a pool through which small donors could contribute to annual pass-through scholarships.
5. Statute cleanup - remove statutory provisions no longer needed owing to closure of the FFELP loan guarantee program and VISTO as state activities.

# Super Goals

by Donna Fulton

The College Goal Sunday Committee met in Eugene on April 13. Our plans are moving forward for the first College Goal Sunday in Oregon on **January 20, 2007**.



We divided the state into four regions:

- 1) Southern Oregon and South Coast;
- 2) Portland area and North Coast;
- 3) Eastern Oregon;
- 4) Mid-valley (Eugene, Salem, Corvallis, etc.).

We will be following the basic design of Portland Community College's FAFSA day which has proven to be successful and is designed more for Oregon students than the national model. A Lead for each region will be contacting schools to develop a team and recruit volunteers for each site. Sites have not yet been selected. Each region will be responsible for selecting sites within that area.

We currently anticipate a minimum of 7 - 10 sites for Oregon for our first year, expanding from there. A Social Marketing Committee will identify the most effective ways to reach students in Oregon.

We will meet again in July. By then, sites will have been determined and the marketing plan finalized.

## Oregon Report Card

from AAWG Progress Report, May '05

Oregon ranks last among its comparators in the number of people age 25 and older with a bachelor's or graduate degree. 26.4% of Oregon's adults have a bachelor's or higher.

State grant aid per enrolled undergraduate student in 2002-03:

Washington	\$483
California	\$367
United States	\$354
Oregon	\$133

# What I Did On My WASFAA Vacation

by Peter Goss, University of Oregon

While Reno was not my destination of choice (bring on Anchorage in 2009!) – and indeed, my luggage feared returning to Reno so much it hopped a flight to Arizona instead – the Conference itself was impressive. And it wasn't just the cute but slightly exploited trained lap-sitting monkey, the talent show with actual talent, or the bounteous crop of bright and energetic financial aid administrators bouncing from session to slot machines to session... no, it was all the incredible offerings.

The pre-conference session on 'Research' was quite good, especially for a course still being developed... and technical issues caused by the hotel not following through on the services they contracted to provide. The presenters are hoping to have it more fully developed for NASFAA 2007, and it could well be dy-no-mite by then. Definitely keep it on your radar.

For the most part, the sessions offered were very solid. With eight different sessions offered during

every time slot, it would have been very difficult to justify skipping out to watch the CSI marathon on Spike. The theme for the conference was 'Financial Literacy' which is an issue I know we have slowly begun dealing with on our campus. WASFAA was a good kick in the pants for us to begin to move forward and also provided some ideas for how to actually do so.

*“The theme for the conference was ‘Financial Literacy’...”*

For the generation of students who have recently graduated, or will graduate soon, the ability to budget effectively and to access and manage debt wisely will be essential to their lives. In a country with a negative savings rate and where everything can be bought on layaway for a low, low monthly payment, it's imperative

that we begin to better prepare our students and ourselves to critically evaluate their financial options, decisions and actions.

On a similar note, right here in our lovely state of Oregon, the State Department of the Treasury has begun an outreach program to high schools called "The Price is Wrong," ([www.tpiw.com](http://www.tpiw.com)) primarily focusing on use of credit cards and identity theft. Recently, they have begun trying to determine how they could adapt their program for a college audience. I call 'dibs.' In all seriousness, if you are interested, you may wish to contact them to see what you can do for each other.

While not all ten of the financial literacy presentations could be rehashed at our events (and the keynote speaker's "Now they have a skill" joke was rehashed to death), this is a topic ripe for exploration and development within OASFAA as well.

## Conference Scholarships

Four OASFAA members received financial assistance from state and regional associations to attend the WASFAA Conference in April.

Sponsored by OASFAA:

- Peter Goss, University of Oregon
- Suzie Petersen, Oregon Institute of Technology

Sponsored by WASFAA:

- Jodi Cashman, Central Oregon Community College
- Terri Crawford, George Fox University



*OASFAA member Bert Logan, Lane Community College, and WASFAA member Francie Campbell, EdFund, receive the award for WASFAA Committee of the Year as Co-Chairs of the WASFAA Training Committee.*

## *My Experience at WASFAA*

*by Jodi Cashman, Central Oregon Community College*

First, I want to express appreciation for the \$500 scholarship I received. I would not have been able to attend the conference had it not been for the generosity of the OASFAA scholarship committee. Our office had not budgeted for anyone to attend the WASFAA Conference and I believe that I am the first person in our office that has attended in quite some time.

I would like to encourage WASFAA members who are in a similar situation to apply for scholarships. This was a wonderful opportunity to learn and network with fellow WASFAA members. I was able to attend sessions that provided me with valuable information and I am able to take that information and apply it to programs that we are currently trying to implement and improve upon.

My focus at the conference was on Financial Literacy. I attended sessions that were presented by Sharon Burns, Executive Director, Association for Financial Counseling and Planning Education (AFCPE) and Sharon Cabeen, Vice President, Financial Literacy, National Student Loan Program (NSLP), which they referred to the “Sharon and Sharon Show.” I thought they did an excellent job presenting the information. They were certainly experts in the field and

*“This was a wonderful opportunity to learn and network...”*

provided me with lots of information I can use to help perfect our Financial Literacy program here at Central Oregon Community College, which is in its infancy. I especially appreciated the examples that were used to bring attention to the program and to entice students to participate. I think the committee made an excellent choice in these presenters and encourage others to make contact with them to find out more about Financial Literacy for your schools.



*WASFAA Executive Council Transition Meeting: OASFAA members Bert Logan, Lane Community College, and President-Elect Tracy Reisinger, University of Portland, help develop the WASFAA Strategic Plan.*

Dr. Norm Finlinson, Associate Dean of Student Academic and Advisement Services, presented “Financial Aid Counseling Techniques” in which he described a program developed by Brigham Young University. It is an outstanding example of a program designed to help reduce indebtedness of students. Dr. Finlinson indicated that they are more than willing to share their program with other schools and freely distributed his business cards.

I was a little intimidated by the vastness of the convention space that was provided at John Asquaga’s Nugget. I am more comfortable with the environment of Salishan in terms of the meeting rooms and vicinity of the facilities. I still managed to find my way to the vendor area and made off with a supply of goodies. The support that the lenders provide was noted and was obviously appreciated.

The “WASFAA Dinner Theater” was outstanding. I was very impressed with the talent and energy we have in our financial aid community.

All in all, I think the planning committee did an awesome job and I commend everyone for all of their hard work. I had a lot of fun.

## *Training Updates*

This year’s **Summer Drive-In** has just been scheduled for **August 9** at Clackamas Community College. The focus of the training will be on HERA and Reauthorization of the HEA. Co-Chairs Mary Jo Jackson and Kathy McCutchen are open to requests and suggestions for additional topics. Email your ideas to Mary Jo at: [maryj@clackamas.edu](mailto:maryj@clackamas.edu)

Registration for the Summer Drive-In is expected to be available by the end of June.

The next **FA101 Workshop** is likely to take place during October, according to Co-Chair Crisanne Werner. Registration should be available approximately six weeks prior to the Workshop and will be announced via the OASFAA list-serve. With any questions, contact Crisanne at: [cwerner@linfield.edu](mailto:cwerner@linfield.edu)

## *My First WASFAA Conference*

*by Terri Crawford, George Fox University*

I was very happy to hear I was selected to receive a scholarship to attend my very first WASFAA conference, which was held in Reno last month. I found the entire experience very helpful and I enjoyed connecting with old friends and making some new ones.

Some of the interest sessions I attended that I found especially useful were on the topics of reauthorization, identity theft and creating great presentations. Each one provided good and useful information. The most anticipated session by far was a general session held the last morning. Jeff Baker brought us the Federal Update, which provided us with up-to-the-minute information on the Academic Competitiveness Grant and SMART Grant for the 06-07 academic year along with other helpful information. I appreciated his patience and thoroughness.

I enjoyed pizza and bowling one night at the Reno Hilton with a large group of other financial aid friends courtesy of Nellie Mae. Most of us had not bowled in many years so we were pleasantly surprised to find we could still knock down a few pins. It was a fun time.

My experience at the conference was exceptional. I am very appreciative of the funds that were provided to help my university with the costs of sending me. Thank you.

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## *Whither Goest OASFAA??*

The ad hoc Site Selection Committee is identifying possible alternative locations for the annual conference. Site visits have included: the Eugene Hilton, Salem Conference Center, Benson Hotel in Portland, and the Seaside Convention Center. The Committee will report their findings to the Board at the next meeting on **May 17**. Contact your Segmental VP to share your opinions and ideas.



*At the WASFAA Conference in Reno, OASFAA President Tracey Lehman visits with Carla Idohl-Corwin, President of the Washington Association, and Renee Baker, President of the Nevada Association.*

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## *Vendor Support Makes WASFAA Possible*

*by Theresa Schierman, University of Portland*

I had the great fortune of attending the 2006 WASFAA Conference as the winner of a generous Tuition Scholarship offered by Montana Guaranteed Student Loan Program (MGSLP) in a prize drawing at the 2005 WASFAA Conference in Portland. Co-Chairs Sandi Guidry and Leonard Walker and their committee members did an outstanding job pulling things together for a successful gathering. John Ascuaga's Nugget proved to be a very accommodating location for the event.

The conference provided a wonderful opportunity to get acquainted with other financial aid professionals in our region. The breakout sessions were very informative and worthwhile: "Marketing Financial Literacy on Campus," "Understanding Tax Returns—Basics & Beyond," "Citizenship Issues & Student Eligibility," "Understanding Credit Scores," "The Tale of Reauthorization," to name a few. At times it was difficult to choose which session to attend! In addition, we were "dazzled" by the presentations given by NASFAA President Dallas Martin and Jeff Baker, U.S. Dept. of Education, regarding the challenges we face with reauthorization. As Jeff Baker quipped, "Don't shoot me, I'm just the messenger!"

The entertainment Monday night was OUTSTANDING! We had a talent show featuring some very gifted individuals from the WASFAA financial aid community, some of which would likely find success on American Idol!

Once again, I have found myself with the great fortune of having won prizes in the vendor drawing. I will have the pleasure of presenting a worthy student at University of Portland with \$1500 in scholarship money compliments of NELA and CHELA. We are so grateful to our vendors for the many, many contributions they make to our community, and most especially to our students.

A special thanks to Jennifer Weir and Jeannie Kupper of ECMC for offering "Slot Machines 101" to Tracy Reisinger and me. Unfortunately, we missed the part about how to win!

## Let's Play JEOPARDY!!!

by Jim Gilmour, University of Oregon

Answer:

Controversial topic revisited every five years by the Financial Aid community.

Question:

What is reauthorization?

Incorrect! The correct answer is:

Where should OASFAA hold its annual conference?

Yes, just like reauthorization, the subject of moving to another location for our annual conference is once again bubbling to the surface. Don't get me wrong. The fact that the topic has been visited before does not diminish its importance: times change, conditions change, and people change. It is instructive, however, to acknowledge past discussions and assess their relevance today.

The impetus to move the conference has never emanated from a loud chorus of members, but rather from vague feelings of discontent among the OASFAA Executive committee. Has Salishan become too costly, too small and too remote to meet our needs? Not in my mind.

Too costly? Last year the cost for a standard double room at this highly-rated luxury resort was \$95. Heck, rooms at NASFAA in Seattle next summer are \$168, and unlike Seattle or Portland, the parking on the coast is as free as the ocean air. Besides, the true cost of the conference location cannot be measured by the price of the guest rooms alone. Conference sites make their money from meeting room and equipment rentals, parking, and meals, as well as guest rooms. Organizations such as OASFAA negotiate the entire package. Therefore, all these factors must be considered to get at true costs and whether or not Salishan's are out of line.

Too small? My observation is that while some of the meeting rooms could be a little larger, they are sufficient for our needs. I don't recall ever having to cancel a session or activity that we really wanted because of the size of the facility. I've encountered much worse space issues at recent NASFAA and EAC conferences where being greeted by a 'closed' or 'standing room only' sign is common.

Guest rooms do fill up. The reasons for this and the number of individuals actually displaced should be examined. That issue aside, there is a real sense of community fostered when the members from one organization dominate an entire facility.

Too remote? This is not necessarily a bad thing. Members come and stay; they have no choice. Being 'remote' psychologically and physically removes participants from day to day tensions of the office. It

*continued on page 10*

## Why Salishan?

by Bert Logan, Lane Community College

# VS.

I would like to propose that OASFAA look for alternatives to holding its annual conference at Salishan year... after year... after year...

Salishan is a nice place, but one of OASFAA's charges should be to spread the economic wealth throughout the state.

There should be four locations within the state – north, south, east, and west – where OASFAA members can share the burden of travel, cost, and inconvenience. Our colleagues south of the 45<sup>th</sup> parallel could use a break every fourth year.

I have heard the argument that Salishan provides the isolation necessary to force attendees to network outside of the formal program. I believe as individuals and mentors, we can achieve that at any location, driven by how friendly each member is and how inviting we are to allow others into our individual space.

There's also the argument that, if we held the conference in the metro areas, most campuses would be day participants only and not spend the night. These are tough times in this state. Costs for meals, lodging, and transportation are high considerations for budget-strapped campuses. Opportunities to commute would be a welcome guest to some campus budgets and might even increase registration because the cost savings for a commuter event might allow more folks to attend. To my knowledge, OASFAA makes no money for meals, lodging, and transportation expenses incurred by campuses.

In the early '90's, OASFAA took a look at capacity and cost in other areas of the state and concluded that Salishan was most economical to attendees without compromising comfort. I would like OASFAA to take another look at this. One peripheral positive impact on the state is to provide cash flow to a variety of local economies throughout the State, rather than one.

Salishan is a far cry from OASFAA's first conference at the Thunderbird Hotel in Eugene. I believe that we could hold the conference anywhere, including a cornfield, and we will come.

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## On the OASFAA Calendar

May 9	AAWG Financial Aid Directors Meeting
May 17	OASFAA Executive Board Meeting
June 25-29	Sr. Dale Brown WASFAA Summer Institute
June 29-30	WASFAA Executive Council Meeting
July 5-8	NASFAA Conference
July 19	OASFAA Executive Board Meeting
July 31	OASFAA Newsletter submission deadline

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enhances informal networking. It provides a welcome respite before spring's exhausting schedule.

Some correctly point out that the remote location makes travel difficult for speakers. It's true. It is a long drive from the Portland airport to Gleneden Beach. However, I have rarely encountered someone unwilling to make the trip strictly due to the conference location. Those that do come invariably feel that the visit was worth the effort and often express an interest in returning.

Last year over 200 people registered for the conference before the agenda was posted. There's a reason for that. People love coming to Salishan. It's a beautiful and familiar location that draws members back year after year.

As for other possible sites, I believe that when all is said and done, the only viable ones at that time of year will be found in the Willamette valley. The advantages, of course, are ease of travel and the possibility that staff could selectively attend sessions without incurring the cost of staying overnight. I have concerns about this from an organizational point of view. I'm concerned that moving to the valley will change the very nature of the conference from a truly wonderful three day professional gathering into a less than satisfying, two day, drive in workshop. Every organization needs to gather its members occasionally to re-infuse itself with energy and to reaffirm its common purpose. For OASFAA, that has been done annually at Salishan for more than thirty years. Will a new site do the same? At this moment, I'm not convinced that it will.

I do know that there is an ad hoc committee studying alternative sites. I look forward to hearing their report and the responses of other members to it. I – for one – however, will not be disappointed if it is concluded that remaining at Salishan turns out to be the best option.

Respectfully submitted,  
Jim Gilmour  
~~May 1991~~  
~~April 1996~~  
~~June 2001~~  
April 2006

## *OASFAA Budget Talks*

*by Tracey Lehman, OASFAA President*

Balancing OASFAA's budget this year is a challenge! Income is not expected to increase. At the same time, we are faced with increased costs; travel expenses have risen by over 30%.

New goals for this year include:

- website enhancements;
- adding liability and event insurance coverage;
- purchase of a digital camera for the newsletter and laptop for the Secretary/Archives Chair;
- support of Oregon's College Goal Sunday.

Consideration also needs to be given to the standard practice of holding in reserve at least one year's budget plus contracted costs. While OASFAA has reserves, it does not meet this standard.

We have some tough decisions to make. We must either cut costs (travel, scholarships, purchases, etc.) or increase revenues (vendor support, dues, fees, etc.), or both.

The Executive Council will vote on the 2006-2007 budget on **May 17, 2006**. Let your Segmental VP know your thoughts on this issue.

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## *On the Lighter Side*

“Recently, I was advising a returning student via email who was considering changing lenders. I suggested that he contact his new lender about the serialization process to combine his new loans with the ones from his prior lender. He replied, ‘STERILIZATION sounds a little extreme to me!’ He decided to stay with his prior lender.”

*Theresa Schierman  
University of Portland*

*Share your financial aid anecdotes (no names, please!) with people who understand. Email: shogren@up.edu*

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## *In Closing: The Future of the OASFAA Newsletter*

We plan to continue to provide news and information that we believe will be of general interest to all OASFAA members. Future issues will include reports from Committee Chairs and your Segmental VP's, reports about training activities, news about outreach and college access efforts by members, and innovations and creative solutions. We also plan to share news about current and new members, as well as profiles of the students we serve.

We would like to hear from you. Email to [shogren@up.edu](mailto:shogren@up.edu):

- articles
- letters to the editor
- technology issues
- humorous anecdotes
- opinion essays
- updates about current members
- student employment issues
- you name it

Your ideas and your feedback on how we're doing will always be welcome!