

Summer Workshop Guide

Summer Workshop

The Vice President is responsible for planning and conducting the summer workshop.

Workshop Staff

Workshop staff generally includes:

- Vice president
- Curriculum director
- Faculty
- Site Director
- Lender Assistant(s)

The vice president is responsible for the selection of the curriculum director and faculty. The vice president shall make every effort to select faculty and other workshop staff representative of the entire SASFAA region in terms of school type and state. The vice president shall make every effort to ensure minority participation as faculty and other workshop staff.

Workshop Site Selection

The current vice president shall recommend a workshop site to be used by his/her successor. The executive board shall review the recommendation. In this way, the association is able to secure the most attractive sites that meet site specifications or criteria.

If a workshop site is satisfactory and meets the association's needs, serious consideration shall be given to using that site for more than one year.

The vice president should consider sites available in all of the nine SASFAA states.

The vice president should research potential sites and then visit. During the visit, the vice president should meet with the site coordinator and view the facilities that will be used. If the vice president is recommending a site for his/her successor, site recommendations should be made no later than the third board meeting of the year (generally held in conjunction with the annual meeting.) It is preferable that the recommendation be made at the second meeting of the year.

Workshop Site Specifications

At a minimum, a workshop site shall meet these criteria:

1. Accessible location. It is preferable that the workshop site be accessible via an airport that has jet service. “Regional” jet service would be considered acceptable.
2. On campus housing to accommodate 175 people – including workshop staff and participants. Suite-style accommodations with semi-private bathrooms are preferable but other accommodations should be considered if the site meets other criteria.
3. On campus dining should be available to accommodate workshop participants and staff.
4. Classroom facilities in adequate number and size. Generally:
 - a. Individual classrooms that accommodate up to 30-35 students – number of classrooms determined by the total size of the workshop.
 - b. Auditorium or large lecture room that accommodates up to 150-175 students.
 - c. Computer lab
 - d. Conference room or classroom that can serve as conference headquarters.

If at all possible, the classrooms should be equipped with up-to-date technology – pc, projector, etc. Overhead projectors should also be available for each classroom.
5. Adequate facilities to support social activities outside the classroom.
6. Adequate facilities for registration, check-in, and check-out activities.
7. Facilities should meet ADA requirements so that all people can participate.

Traditional workshop schedule:

- Friday - Workshop staff arrive
- Saturday - Workshop staff prepare for week; registration for early arrivals
- Sunday – Registration; workshop begins in late afternoon; ice breaker activities
- Monday through Thursday – class activities and social activities
- Thursday - banquet celebration
- Friday – Workshop ends by lunch; workshop staff has final wrap-up meeting

Job Descriptions for Workshop Staff

Curriculum Director Job Description

The curriculum director is KEY to a successful summer new aid officers’ workshop. In addition to providing the curriculum for the workshop, he/she guides the faculty in classroom instruction, giving them tips and training as required. The curriculum director also provides the curriculum and selects the instructors for the one-day workshop held in conjunction with the annual conference – the February prior to the summer workshop for which he/she is responsible.

The curriculum director is expected to arrive at the summer workshop site on Friday prior to the beginning of the workshop (Sunday) and remain through the following Friday afternoon (the close of the workshop).

He/she is specifically responsible for the following activities:

- Developing agenda for workshop and classroom activities, in conjunction with vice president.
- Developing curriculum for workshop – including slides for presentations, handouts, scripts for instructors, as needed, case studies, etc., ensuring that information is accurate and up to date.
- Preparing instructor and participant notebooks for printing.
- In conjunction with vice president, pairing instructors into teaching teams.
- Guiding faculty in classroom instruction, providing tips and training in presentation skills as necessary. Correcting any instructional errors, presentation problems, etc. as they arise.
- Reviewing and revising the participant self-assessment form as required.
- Distributing and collecting self-assessment form – preferably via email.
- Maintaining database of participants as they register – to include name, institution, address, voice, fax, email, title, length of time in position, length of time in the field, self-assessment score, and classroom assignment.
- Placing participants in appropriate classrooms, based on the self-assessment form and other information provided by the participant/others.
- Conducting, in conjunction with vice president, meetings with faculty and lender assistants - during the annual conference, planning retreat, during the workshop.
- Serving as a resource for faculty and participants.
- In conjunction with vice president, securing computer laboratory facilities for EDE instruction, internet access, etc. if site allows for that possibility.
- Encouraging participants in classroom and social activities, helping them to feel welcome and comfortable.
- Other activities as requested by the vice president.

Instructor Job Description

The workshop instructor is a vital element in a successful summer new aid officers' workshop. He/she provides classroom instruction and becomes a mentor to the participants. Returning instructors (those who have completed their first summer workshop) generally serve as the instructors for one-day workshop held in conjunction with the annual conference.

The instructor is expected to attend a planning retreat in the spring prior to the workshop. The instructor is expected to arrive at the summer workshop site on Friday prior to the beginning of the workshop (Sunday) and remain through the following Friday afternoon (the close of the workshop).

The instructor is specifically responsible for the following activities:

- Reviewing curriculum materials provided. This should be done prior to arrival at the workshop.
- Reviewing case studies as requested by the curriculum director
- Working closely with teaching partner to make the classroom experience of the highest quality possible.
- Participating in training provided by the vice president, curriculum director, or other, designed to enhance presentation skills.
- Providing supplemental materials, suggestions, etc. to the curriculum director and vice president to ensure the highest quality workshop possible.
- Encouraging participants in classroom and social activities, helping them to feel welcome and comfortable.
- Other activities as requested by the vice president and/or curriculum director.

Lender Assistant Job Description

Lender assistants help set the tone of the social activities for the workshop. They also run errands as required, freeing the vice president, curriculum director, and instructors to take care of other aspects of the workshop.

The lender assistant is expected to arrive at the workshop site on Friday prior to the beginning of the workshop (Sunday) and remain through the following Friday afternoon (the close of the workshop).

The lender assistant is specifically responsible for the following activities:

- Meeting and greeting participants.
- Assisting instructors with move-in.
- Assisting participants with registration and move-in.
- Distributing “goody bags” and/or others items for instructors and/or participants (contents to be determined by vice president)
- Encouraging participants in classroom and social activities, helping them to feel welcome and comfortable.
- Transporting faculty, vice president, curriculum director, other guests to/from airport.
- Transporting faculty, vice president, curriculum director, other guests, and participants to/from appropriate facilities in emergency situations or other “approved” activities. (For example, transporting someone to the pharmacy for a prescription.)
- Stocking social area with food and drink as required.
- Photographing classes, workshop participants, instructors, etc. and having film developed for distribution by Thursday (of the workshop week) afternoon at the latest.
- Videotaping workshop and putting together video for showing Thursday at banquet.
- Conducting funny olympics activity (Sunday of the workshop week).
- Printing materials on site – taking originals, picking up copies, assisting with distribution, etc.

- Writing and printing daily newsletter – Monday, Tuesday, Wednesday, Thursday – during workshop.
- If necessary, assisting the vice president in making sure that vendors registered for the workshop do not market their products during the workshop.
- Other activities as requested by the vice president and/or curriculum director.

Site Director Job Description

A strong site director is critical to the success of the workshop.

He/she attends the planning retreat prior to the workshop and is available from the Friday evening prior to the workshop until the workshop end.

He/she is specifically responsible for:

- Providing local arrangements assistance for the summer workshop.
- Working closely with the vice president and the Curriculum director in the planning and execution of the summer workshop.
- Acting as the liaison between the host site and the Vice President.
- Assisting in making arrangements for workshop accommodations and services.
- Organizing transportation to/from the airport and the workshop site.
- Securing on-site volunteers or paid staff (not paid by the association) to assist with the workshop.
- Other activities as requested by the vice president and/or curriculum director.

Expenses

The association covers travel and other workshop-related expenses for the site director, curriculum director, instructors, and vice president. The lender assistant(s) provide their own transportation to and from the workshop. Room and board is provided for all workshop staff – during the planning retreat and the workshop itself.

Forms

Promotional Piece and Registration Form

The vice president shall prepare promotional pieces for publication on paper or the Internet about the workshops, the one-day workshop and the summer workshop. The vice president shall prepare registration forms, in consultation with the treasurer and the curriculum director.

Written materials about the workshop shall include (but are not necessarily limited to):
(sample enclosed)

1. Site
2. Dates and times

3. Cost
4. Accommodations – lodging, meals – what is provided and what the participant needs to bring with him/her
5. Activities related to the workshop
6. Travel information – airline, map, SASFAA airline number, etc.
7. Deadlines for registration and fee payment
8. Tentative agenda and topics

Self-Assessment Form

The vice president and/or curriculum director develop a self-assessment form for participants. (sample enclosed)

Directory of Participants

Preferably before the end of the workshop, the vice president provides a directory to participants and staff. Information should include: name, address, voice telephone number, fax number, e-mail address, and class designation. If the vice president is unable to provide this directory before the end of the workshop, it is to be mailed to the appropriate individuals.

Certificate of Achievement/Recognition

The vice president shall provide a certificate of achievement/recognition to each participant. The vice president should sign certificates. The president and/or curriculum director can also sign the certificate.

Sample Contract

I agree to serve SASFAA in the capacity of *Instructor/Curriculum Director/Site Director* and to assist with preparations for the YYYY SASFAA New Aid Officer or Mid Level Workshop. Specifically I will:

1. Attend the workshop staff retreat in *location and date*.
2. Commit to the period of *dates* for the actual workshop, by arriving at *location* by *time* on *date*, assisting with workshop preparations, serving in my capacity until *date*, and participating in the closing staff meeting following the end of the workshop on *date*.
3. Receive an honorarium of *\$500 in my capacity as New Aid Officer Instructor/\$599 in my capacity as New Aid Officer Curriculum Coordinator/\$599 in my capacity as New Aid Officer Site Director/\$200 in my capacity as a Mid-Level Instructor*. (The exception to this is contained in Article 5 of SASFAA's Articles of Incorporation, which forbids payment to any officer of the Association for performing service to the

Association.) I understand that it is my responsibility to report this honorarium payment on my personal income tax return.

4. Immediately notify the Vice President in writing if unavoidable circumstances prevent me from fulfilling any of these agreed upon obligations.

Signatures of vice president and individual.

Summer Workshop

Participant Pre-Workshop Self-Assessment

The purpose of this form is for you to provide information to the SASFAA Workshop staff on your background and level of experience. Every effort will be made to assign you to a classroom with other participants of similar experience and level. This information is **critical** in determining your assignment. Please take a few minutes to review each task carefully and assess your current ability to perform the task.

There are 3 ways to provide this information to the staff: email, fax, mail.

- Name
- Institution
- Job Title
- E-mail address
- Number of years/months in current job title listed above

For each task, assign a skill level rating using the following scale:

- | | |
|---|---|
| 5 | I can do this task with little or no problem |
| 4 | I can do this task but I may need occasional assistance |
| 3 | I can do this task but I would definitely need assistance |
| 2 | I am only somewhat familiar with the concept |
| 1 | HELP!!!!!!!!!! |

TASK SCORE

1. _____ Provide information to a student or family on all financial aid programs, including general eligibility requirements.
2. _____ Assist students and parents with questions about completing the FAFSA.
3. _____ Explain to a family the process of applying for financial aid, including reviewing a SAR/ISIR and assisting with the correction process.

4. _____ Complete the required federal verification for a student application.
5. _____ Recalculate the EFC after receiving a SAR/ISIR and verification documents because corrections were needed.
6. _____ Use electronic processing (such as EDE) for submitting corrections to the federal processor for recalculation of the EFC.
7. _____ Using your institution's packaging policy, determine a student's award consistent with this policy.
8. _____ Calculate a Federal Pell Grant award based on the student's federal eligibility, enrollment level and period of enrollment.
9. _____ Certify a loan application for any of the FFELP/Direct Loan programs and provide entrance counseling for a federal loan.
10. _____ Know the type of records that must be kept on file in the financial aid office for federal/state program review purposes.

Please provide below any comments that you feel are relevant to determine your placement.

Sample from Summer 2006 - Promotional Piece

Purpose

The SASFAA Summer Workshop is an intense professional development activity designed to provide a working knowledge of the federal financial aid programs, as well as an understanding of the laws and regulations that govern these programs. The curriculum will take the student from A - Z through the basics of financial aid.

Intended Audience

The workshop is intended for new financial aid administrators with less than three years of experience in the field of financial aid. Other individuals whose professional responsibilities include significant contact with the financial aid process are welcome to attend the workshop on a space-available basis. Registration will be available in February.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, will conduct the class sessions. The instructors will teach in teams of two and work with the same class of participants throughout the week. Lectures, interactive instruction and case studies will be used throughout the week. The faculty will be on site for the entire week, providing opportunities for ample interaction outside the classroom.

Curriculum

Topics to be covered include:

Application Process	SAR/ISIR	Student Eligibility
Federal Methodology	Federal Title IV Programs	IRS Forms
Verification	Record Keeping	Cost of Attendance
Packaging	Professional Judgment	Cash Management
Satisfactory Academic Progress	Loan Certification Issues	Legislative Process
Debt Management	Customer Service	FERPA
Consumer Information	High School Nights	Annual Reports
Program Reviews	Financial reviews	

Location and Dates

The workshop will be held on the beautiful campus of University of North Carolina - Asheville in Asheville, North Carolina. All workshop participants will stay in Mills Hall Dorm on campus. Information about UNC - Asheville can be found at www.unca.edu - pictures of the campus can be found at www.unca.edu/welcome/pictures.html.

Participants should plan to arrive no later than 1:00 pm on Sunday, June 18, 2006 to check-in and take care of on-site registration activities. Check-in and on-site registration will be from 9:00 am until 4:00 pm on Sunday, June 18, 2006.

The first class begins at 3:00 pm on Sunday, June 18, 2006. The workshop concludes at 11 am on Friday, June 23, 2006.

Participants may arrive on Saturday, June 17, 2006. Check-in and on-site registration will be available from 12:00 pm until 4:00 pm on Saturday. There is an additional charge if you arrive on Saturday.

Please make your travel arrangements to allow you to arrive before the workshop begins on Sunday afternoon and for you to attend all of Friday morning's activities.

Cost

The registration fee for the workshop is \$650, if registration completed by May 24, 2006 and \$700 if completed after May 24, 2006. The registration fee includes all instructional materials, most meals, housing and your 2005-06 SASFAA membership (\$25). A minimum non-refundable (but transferable) deposit of \$100 must accompany the registration form. Early arrivals - those participants arriving on Saturday, June 18, 2006 will be charged an additional \$30 fee to cover the additional night's lodging.

Housing

Housing is provided in residence halls located on UNC - Asheville's campus. Each apartment has two bedrooms (single occupancy in each bedroom), 1 bathroom, and a living room area. Amenities include one microwave-refrigerator. Basic furniture includes a couch, chair and side table in the living room area and a bed, study desk (with built-in study lamp), chair and wardrobe in the bedroom. Linens are provided (one pillowcase, two sheets, one pillow, one blanket, 2 facecloths, and two towels per person). The suites do not have televisions. Participants will be housed in West and South Ridge Residence Halls. For additional information on the residence halls you can go to:
<http://www.unca.edu/housing/files/residence-halls/general-information/>.

All rooms are air-conditioned. Each room has an Internet connection for each person. Each participant will receive a key to their suite/room - there is a \$25 key replacement charge if a key is lost.