2015 conference program

JULY 19-22 ★ NEW ORLEANS, LA
Helping families responsibly save, plan, and pay for college

Visit Sallie Mae® at Booth #407

Plus, join us for these sessions:

**Helping Students Make Good Financial Decisions That Will Lead to a Strong Credit Score**
Monday, July 20, 2015, 3:15 p.m.– 4:15 p.m., in Strand 13AB

**Social Media 200: Advanced Techniques**
Tuesday, July 21, 2015, 3:00 p.m.– 4:00 p.m., in Celestin F

For more information about our products and services, visit SallieMae.com.
Good grades.
Cash reward.

Visit booth #401 to learn more

or contact us at DiscoverStudentLoans.com 1-877-321-5018
Smart Tools. Successful Students.

The iontuition toolkit includes:

- ionManage: Student Loan Management
- ionLearn: Personal Finance Education
- ionMatch: College Search and ROI
- ionNation: Social network for higher education
- ionPay: Student loan payment engine

Come to BOOTH 700 for a brief demo and receive a FREE power bank to charge your device!

Student Loan Default Aversion

Whether you outsource your default aversion program or perform it in-house, i3 can help your school:

- Forecast cohort default rates by school and program
- Reduce delinquencies from occurring with our early outreach program
- Achieve early ROI, reducing cost and compliance risks for schools
- Deliver real-time analytics that improve institutional decision making
Conference Task Forces

- Christine McGuire (Chair), Boston University, EASFAA
- Connie Corcoran, Emporia State University, RMASFAA
- Marcia McConnell, Berry College, SASFAA
- Melissa Moser, Coast Community College, WASFAA
- Susan Murphy, University of San Francisco, WASFAA
- Nick Prewett, University of Missouri, MASFAA
- Taina Savoit (Vice Chair), McNeese State University, SWASFAA
- Gina Soliz, Syracuse University, School of Law, EASFAA
- Sonia Townsend, San Jacinto College, SWASFAA

Local Arrangements

- David Page (Chair), Dillard University
- Carla Bolden, Southern University and A&M College
- DeWanna Fontenot, Delta College of Arts & Technology
- La’Charlotte’ Garrett, Southern University, New Orleans
- Carrie Glass, Loyola University New Orleans
- Mike Goodman, Tulane University
- Nadine Laurent, Loyola University New Orleans
- Sandy Livings-Veals, Xavier University
- Emily London-Jones, Xavier University
- Shannon Neal, Dillard University
- Cathy Simoneaux, Our Lady of Holy Cross College
- Theo Wright, Dillard University
NASFAA Shuttle Service

Shuttles will provide service from all official hotels to and from the Hyatt Regency New Orleans. Hotels include the Holiday Inn New Orleans - Superdome, La Pavillon, Homewood Suites New Orleans and Intercontinental New Orleans.

**Sunday, July 19**
8:00am – 12:30pm – every 15 minutes  
12:30pm – 4:45pm – every 30 minutes  
4:45pm – 7:00pm – every 15 minutes

**Monday, July 20**
7:00am – 9:00am – every 15 minutes  
9:00am – 4:45pm – every 30 minutes  
4:45pm – 6:00pm – every 15 minutes

**Tuesday, July 21**
7:00am – 9:00am – every 15 minutes  
9:00am – 4:00pm – every 30 minutes  
4:00pm – 5:45pm – every 15 minutes

**Wednesday, July 22**
7:30am – 11:30am – every 15 minutes

Name Badges are required for admission to all conference sessions, meal functions, and the Exhibit Hall. Lost your name badge? Go to the On-Site Registration desk to obtain a replacement.

Your Digital Business Card is the barcode on the back of your name badge and includes your name, title, school, address, email, and phone. Exhibitors and attendees use this time-saving device at booths. Remember – it is your choice which exhibitors you allow to scan your badge.

Play ScanTrivia using your mobile device by scanning QR codes that have trivia questions about NASFAA, exhibitors, and New Orleans. If you answer the questions correctly, you will receive points. A leaderboard will be displayed on a monitor and will keep track of who is playing and who is winning! Winners will be announced throughout the conference, with one grand prizewinner and several runners-up.

Meal tickets are provided with your name badge and must be presented for the Sunday evening reception, Monday and Tuesday luncheons, and the Wednesday breakfast.

Extra Meal Tickets, if available, may be purchased at the NASFAA On-Site Registration desk located on Level 1. Meal prices are actual NASFAA cost: Sunday evening reception $65; Monday lunch $60; Tuesday lunch $60; Wednesday breakfast $38.

Exhibits are located in the Elite Hall on Level 1. For hours, see the conference schedule on page 8 or the Schedule at-a-Glance. Only registered attendees are permitted access to the Exhibit Hall.

The Information Desk, Message Center, and Lost and Found are located in the Strand Foyer on Level 2. Check the message board daily. Forms to post your messages are available at the information desk.
The Relax & Recharge Lounge (sponsored by iontuition/i3 Group) is located on Level 1 and is the perfect place to relax for a few minutes between sessions. Have a seated massage while your laptop or mobile device is charging. Masseuses will be available Sunday 2:00pm - 5:00pm, Monday 2:00pm - 5:00pm, and Tuesday 1:00pm - 4:00pm (times subject to change).

Charging stations for your cellphone, iPad, laptop, and other devices are located on Level 1 in the Relax & Recharge Lounge and on Level 3 in the Celestin Foyer.

Meeting Etiquette: Sensitive to the concerns of our members, NASFAA affirms the right of all individuals to function in an environment free of offensive behavior.

- No talking during presentations and please refrain from having loud conversations directly outside of a meeting room.
- Turn off pagers, cellphones, and signal watches during conference functions.
- Use perfume or cologne sparingly, as others around you may be allergic.

U.S. Department of Education Resources: In the NASFAA Exhibit Hall, located in Elite Hall on Level 1, schools can meet with staff from the Department of Education (ED) about student aid related issues and concerns regarding their participation in Title IV programs. In the “Ask a Fed” area, staff can ask general questions on all Title IV matters.

You may access the Hyatt Regency New Orleans WiFi network for business use in the meeting space area.

This service is sponsored by Inceptia.

SSID: NASFAA15
Encryption Key: inceptia

CONNECT IN NEW ORLEANS!
NASFAA and Inceptia are providing free wifi!
Sunday, July 19, 2015

Opening Session – Hill Harper – Featured Speaker - 12:45pm - 2:15pm

Hill Harper is an award-winning actor, best-selling author, and philanthropist. Harper starred on the CBS TV drama “CSI: NY” from 2004 to 2013. As of March 2013, he joined the USA Network spy drama “Covert Affairs.” Harper is the author of four New York Times bestsellers and he has earned seven NAACP Image Awards for his writing and acting. He is founder of the Manifest Your Destiny Foundation, dedicated to empowering underserved youth through mentorship, scholarship and grant programs.

Harper graduated magna cum laude as valedictorian of his department with a bachelor’s degree from Brown University and cum laude with a doctorate in law from Harvard Law School. He also holds a master’s degree with honors from Harvard University’s Kennedy School of Government and has honorary doctoral degrees from Winston-Salem State University, Cheyney University, Westfield State College, Tougaloo College, Dillard University and Howard University.

Welcome Reception - 4:45pm – 6:30pm

Join National Chair Eileen O’Leary in the NASFAA Exhibit Hall and network with your colleagues from across the nation. This is a great way to reconnect with colleagues you have not seen in the past year, meet new friends, and learn about the products and services offered by our exhibitors. Be sure to stop by the NASFAA booth and meet the NASFAA staff.

Monday, July 20, 2015

General Session - Yes or No? Student Loans Are a Crisis For Students and the Economy - 9:00am - 10:00am

Student loan borrowing continues to escalate each year, with an estimated 7 million borrowers in default on over $100 billion. Have we now reached a level of crisis that will soon wreak havoc on students and the economy? Come join this “oxford style” debate between two teams as they present reasoned arguments on whether student debt has grown to such epic levels that it is now a crisis for students, the economy, and our national future. Audience members will play a role in determining the winner by voicing their opinion via text message after two teams make their case.

Beth Akers - Debater

Beth Akers is a fellow in the Brookings Institution’s Brown Center on Education Policy. She is an expert on the economics of education, with a focus on higher education policy. Akers’s recent writing has been on the topics of student loan debt, information in higher education and extended time-to-degree. She previously held the position of staff economist with the President’s Council of Economic Advisors, where she worked on federal student lending policy as well as other education and labor issues. Akers received a B.S. in Mathematics and Economics from SUNY Albany and a Ph.D. in Economics from Columbia University. She is often cited by major media outlets and has briefed policy makers on the topic of student loans.

Kevin Fudge - Debater

Kevin Fudge is the Manager of Government Relations and Community Affairs at American Student Assistance. He works with policymakers, state agencies and non-profit organizations to increase college access, college completion and successful education debt management. He works with members of state government to provide effective solutions to complex student loan situations faced by their constituents or from their own education loans. He provides research and analysis of student loans to secondary school administrators and higher education professionals. He has appeared in media outlets such as NPR, NBC, CBS, U.S. News & World Report, The Washington Post and The Boston Globe. Kevin is a graduate of the University of Virginia and received his M.Ed in Education Policy and Management from Harvard Graduate School of Education.
Andrew P. Kelly - Debater
Andrew P. Kelly is a resident scholar in education policy studies and the director of the Center on Higher Education Reform at the American Enterprise Institute (AEI), where he works on higher education policy, innovation in education, financial aid reform, and the politics of education policy. Previously, Kelly was a graduate student at the University of California, Berkeley, where he received a National Science Foundation research training fellowship and was honored as an outstanding graduate student instructor. Before graduate school, Kelly served as a research assistant at AEI, where his work focused on how to prepare K-12 school leaders, collective bargaining in public schools, and the politics of education. Kelly’s findings have appeared in the American Journal of Education, Education Next, Educational Policy, Policy Studies Journal, and Teachers College Record.

Tim Ranzetta - Debater
Tim’s saving habits started at seven when a neighbor with a broken hip gave him a dog walking job. Her recovery, which took almost a year, resulted in Tim getting to know the bank tellers quite well (and accumulating a savings account balance of over $300!). His recent entrepreneurial adventures have included driving a shredding truck, analyzing executive compensation packages for Fortune 500 companies and helping families make better college financing decisions. After volunteering in 2010 to create and teach a personal finance program at Eastside College Prep in East Palo Alto, Tim saw firsthand the impact of an engaging and activity-based curriculum, which inspired him to start a new non-profit, Next Gen Personal Finance.

John Donvan - Moderator
The moderator of Intelligence Squared U.S. debates since 2008, John Donvan is an author and correspondent for ABC News. He has served as ABC’s White House Correspondent, along with postings in Moscow, London, Jerusalem and Amman. In addition to recently premiering his first one-man show, Lose the Kid, in Washington, D.C., John is currently writing a book on the history of autism, to be published by Crown in January 2016. John is a three-time Emmy Award winner and was a National Magazine Award finalist in 2010.

Luncheon with Featured Speaker Justin Draeger - 12:45pm - 2:15pm
From Idea to Reality: NASFAA’s Policy Initiatives - As reauthorization of the Higher Education Act continues to gain momentum, it has never been more important for the voices of financial aid administrators to be heard on student aid issues. NASFAA President Justin Draeger will detail NASFAA’s proactive policy work and legislative positions and provide ways members can lend their voices to higher education access and success.

Networking Event—Un-Wine-d Hour - 4:15pm - 5:30pm
Join your colleagues in the NASFAA Exhibit Hall to speak with colleagues, exhibitors and NASFAA staff, and to snap some fun pictures at the photo booth and upload them seamlessly to Facebook.

NASFAA’s 50th Anniversary Parade - 6:30pm
Join us as we close down the streets between the Hyatt Regency (conference headquarters) and the French Quarter, picking up conference attendees at each hotel along the way. In addition to nearly 3,000 financial aid professionals, the parade will include a high school marching band, a brass jazz band, and some fun surprises.

Tuesday, July 21, 2015
Luncheon & Annual Business Meeting - 11:30am – 1:30pm
Join us for lunch to hear from departing National Chair Eileen O’Leary and Incoming Chair Dan Mann about the state of the association and our future. We will also celebrate the accomplishments of your colleagues as we present a number of awards.

Wednesday, July 22, 2015
Closing Breakfast - 8:30am – 11:00am
Join your new National Chair Dan Mann at this closing session. Attendees will hear from the U.S. Department of Education’s Federal Student Aid Director of Policy Liaison and Implementation Jeff Baker, and Deputy Assistant Secretary for Policy, Planning and Innovation Lynn Mahaffie about updates to the Department of Education’s Title IV activities and initiatives. Topics will include the president’s Title IV budget proposals, including the status of sequestration; changes to Title IV programs as a result of the Supreme Court’s Defense of Marriage Act (DOMA) decision; the new FSA ID; and an update on the Department’s regulatory efforts.
CONFERENCE SCHEDULE

Sunday, July 19

6:00am - 4:00pm  Exhibitor Move-In
    Elite Hall - Level 1

7:00am - 7:50am  Feel Great... with Zumba
    Foster 1 - Level 2

8:00am - 10:00am Conference Mentors Task Force
    Imperial 9 - Level 4

8:00am - 12:30pm Information Desk Open
    Strand Foyer - Level 2
    NASFAA T-Shirt Sales
    Elite Foyer - Level 1
    Housing Desk Open
    Strand Foyer - Level 2

8:00am - 6:30pm  Relax & Recharge Lounge Open - Sponsored by iontuition/i3 Group
    Elite Foyer - Level 1

9:00am - 11:00am Finance & Audit Committee Meeting
    Imperial 8 - Level 4
    Enrollment Management Task Force Meeting
    Imperial 4 - Level 4
    50th Anniversary Task Force Meeting
    Imperial 6 - Level 4
    Ethics Commission Meeting
    Imperial 7 - Level 4

10:00am - 11:00am First-Time Conference Attendees’ Kick-Off Networking Event - Sponsored by College Ave Student Loans
    Celestin BC - Level 3

10:30am - 11:45am Community College Caucus
    Strand 10AB - Level 2
    Four-Year Public Caucus
    Strand 11AB - Level 2
    Independent College Caucus
    Strand 12AB - Level 2
    Proprietary Sector Caucus
    Strand 13AB - Level 2

11:00am - 12:30pm NASFAA’s 50th Anniversary Information Desk
    Elite Foyer - Level 1

12:45pm - 2:15pm Opening Session with Keynote by Hill Harper
    Empire Ballroom - Level 2

2:00pm - 5:00pm  NASFAA T-Shirt Sales
    Elite Foyer - Level 1
    NASFAA’s 50th Anniversary Information Desk
    Elite Foyer - Level 1

2:15pm - 5:00pm  Information Desk Open
    Strand Foyer - Level 2
    Housing Desk Open
    Strand Foyer - Level 2
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<th>Time</th>
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<tr>
<td>2:30pm - 3:30pm</td>
<td>Making Determinations of Unaccompanied Homeless Youth Status</td>
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<td>Student Loan Repayment Through Employer Withholding</td>
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<td>A Collective and Pioneering Methodology to Student Financial Literacy</td>
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<td>Innovative New Programs - How to Remain in Compliance in a Changing Landscape</td>
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<td>It’s All in the Game!</td>
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<td>From “Schoolhouse Rock” to IFAP</td>
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<td>Federal Town Hall</td>
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<td>R2T4 - Credit Hour Programs</td>
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<td>AwardSpring: A Better Way to Manage Your Scholarships</td>
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<td>NASFAA Management Benchmarking Task Force</td>
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<td>3:30pm - 3:45pm</td>
<td>Break - Sponsored by The College Board</td>
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<td>Celestin &amp; Strand Foyers - Levels 2 &amp; 3</td>
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<td>3:45pm - 4:45pm</td>
<td>Communicating Value vs. Price - Why Transparency is Key</td>
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<td>Federal Update on HRSA’s Title VII and VIII - Student Loans and Scholarships</td>
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<td>Innovative Strategies for Diversity in the Financial Aid Office</td>
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<td>Award Letters: Decoding with Students and Families</td>
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<td>SoFi: Student Loan Refinancing 101</td>
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<td>Strand 1 - Level 2</td>
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<td>4:00pm - 4:45pm</td>
<td>Exhibitor &amp; Sponsor Appreciation Reception (Exhibitors &amp; Sponsors Only)</td>
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<td>4:45pm - 6:30pm</td>
<td>Welcome Reception &amp; Exhibit Hall Open</td>
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<td>Elite Hall - Level 1</td>
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Monday, July 20

7:30am - 8:45am  Past Presidents and National Chairs Breakfast
            Strand 5 - Level 2

8:00am - 8:45am  Graduate & Professional Institutions’ Networking Breakfast
            Imperial SAB - Level 4

           Continental Breakfast
            Elite Hall - Level 1

           How Can Research be More Relevant to Practice? A Facilitated Discussion
            Imperial 3 - Level 4

8:00am - 12:30pm  Information Desk Open
            Strand Foyer - Level 2

           Exhibit Hall Open
            Elite Hall - Level 1

           NASFAA T-Shirt Sales
            Elite Foyer - Level 1

           Housing Desk Open
            Strand Foyer - Level 2

           NASFAA’s 50th Anniversary Information Desk
            Elite Foyer - Level 1

8:00am - 4:30pm  Registration Open
            Registration - Level 1

8:00am - 5:30pm  Relax & Recharge Lounge Open - Sponsored by iontuition/i3 Group
            Elite Foyer - Level 1

9:00am - 10:00am  General Session - Yes or No? Student Loans Are a Crisis For Students and the Economy
            Empire Ballroom - Level 2

10:00am - 10:15am  Break - Sponsored by Cooley LLP
            Celestin & Strand Foyers and Elite Hall - Levels 1, 2 & 3

10:15am - 11:15am  Innovative Tools to Enhance Your NASFAA Membership Experience
            Celestin F - Level 3

           The Big Idea in Student Aid: NASFAA’s Policy Challenge - Round 1
            Strand 11AB - Level 2

           New Research and College-Level Policies to Help Students Borrow Responsibly
            Celestin GH - Level 3

           The Future of PSLF: Recommendations, Reauthorization, and Beyond
            Strand 12AB - Level 2

           Leveraging Financial Aid to Expand Student Opportunities
            Strand 13AB - Level 2

           Federal Town Hall
            Celestin D - Level 3

           Gainful Employment
            Celestin E - Level 3

           NSLDS Update
            Strand 10AB - Level 2

F  Student Self-Service: The Future of Financial Aid
            Strand 1 - Level 2

F  AwardSpring: A Better Way to Manage Your Scholarships
            Strand 7 - Level 2

10:15am - 12:30pm  NASFAA U - Professional Judgment
            Celestin A - Level 3

H  Ethics and Financial Aid: Right or Wrong
            Celestin BC - Level 3

11:15am - 11:30am  Break - Sponsored by Cooley LLP
            Celestin & Strand Foyers and Elite Hall - Levels 1, 2 & 3
11:30am - 12:30pm

Working with Undocumented Students; Deferred Action for Childhood Arrivals
Strand 13AB - Level 2

Educating the Department of Education and Congress About Graduate Education
Strand 12AB - Level 2

Leveraging Analytics to Drive Financial Aid Counseling Strategy
Celestin F - Level 3

Minimizing Liabilities in an ED Program Review
Celestin GH - Level 3

Consumer Information Requirements
Celestin D - Level 3

Gainful Employment
Celestin E - Level 3

Privacy and Data Protection
Strand 10AB - Level 2

F The Redesigned SAT and Financial Aid
Strand 1 - Level 2

F FluidReview by SurveyMonkey: A Powerful, Flexible and Comprehensive Scholarship Management Solution
Strand 7 - Level 2

Examining NCAA Rule Changes and Cost of Attendance
Strand 11AB - Level 2

12:45pm - 2:15pm   Luncheon with Featured Speaker Justin Draeger
Empire Ballroom - Level 2

2:15pm - 3:15pm   Exclusive Exhibit Hall Hour - Play ScanTrivia
Elite Hall - Level 1

2:15pm - 4:30pm   Information Desk Open
Strand Foyer - Level 2

Housing Desk Open
Strand Foyer - Level 2

2:15pm - 5:00pm   NASFAA T-Shirt Sales
Elite Foyer - Level 1

NASFAA’s 50th Anniversary Information Desk
Elite Foyer - Level 1

2:15pm - 5:30pm   Exhibit Hall Open
Elite Hall - Level 1

3:00pm - 3:15pm   Break - Sponsored by Cooley, LLP
Strand & Celestin Foyers and Elite Hall - Levels 1, 2 & 3

3:15pm - 4:15pm   Helping Students Make Good Financial Decisions
Strand 13AB - Level 2

Two Loan Disbursements + Midterm Grades = Increase in Student Success!
Celestin GH - Level 3

P The Many Hats and Faces of a Director
Celestin BC - Level 3

Financial Literacy - Grad Students: Highly Intelligent v. Financially Savvy
Strand 12AB - Level 2

NCAA - An Update on Division I Financial Aid Legislation
Strand 11AB - Level 2

Holistic Campus Solutions - Collaborating Towards Student Retention & Success
Celestin A - Level 3

Consumer Information Requirements
Celestin D - Level 3

COD Update
Celestin E - Level 3

Verification for 2016-17
Strand 10AB - Level 2
CONFERENCE SCHEDULE

AcademicWorks: Comprehensive Scholarship Management Solution
Strand 1 - Level 2

Best Practices for Improving Your Cohort Default Rate
Strand 7 - Level 2

4:15pm - 5:30pm
Un-Wined-Hour in Exhibit Hall
Elite Hall - Level 1

6:30pm - 7:30pm
NASFAA’s 50th Anniversary Kick-Off Parade
Meet in the Hyatt Lobby

Tuesday, July 21

7:30am - 8:45am
Regional and State Presidents Breakfast
Strand 5 - Level 2

8:00am - 8:45am
Continental Breakfast
Elite Hall - Level 1

How Can Research be More Relevant to Practice? A Facilitated Discussion
Imperial 3 - Level 4

8:00am - 11:15am
Exhibit Hall Open
Elite Hall - Level 1

NASFAA’s 50th Anniversary Information Desk
Elite Foyer - Level 1

8:00am - 11:30am
Information Desk Open
Elite Foyer - Level 1

8:00am - 11:45am
Registration Open
Registration - Level 1

8:00am - 4:30pm
Relax & Recharge Lounge Open - Sponsored by Iontuition/i3 Group
Elite Foyer - Level 1

9:00am - 10:00am
Graduate/Professional Town Hall Meeting
Strand 12AB - Level 2

Evaluating & Reporting the Effectiveness of Online Communication w/Students
Strand 11AB - Level 2

10:00am - 10:15am
Break - Sponsored by National Student Clearinghouse
Celestin & Strand Foyers and Elite Hall - Levels 1, 2 & 3

10:00am - 11:15am
Financial Aid Issues in a Competency-Based Education Model
Celestin A - Level 3

Financial Aid Tool Box - A-Z
Celestin BC - Level 3

R2T4 & Modules: Navigating the New Regulations from the Campus Perspective
Celestin GH - Level 3

Walking the Path: Behavioral Finance to Strengthen Financial Ed Outcomes
Strand 13AB - Level 2

100% Direct Subsidized Loan Limits
Celestin D - Level 3

COD Update
Celestin E - Level 3

NASFAA’s Peer Review Program: Like An Audit But w/Empathy & Advice
Celestin F - Level 3

Award Letters that Don’t Suck
Strand 1 - Level 2

FluidReview by SurveyMonkey: A Powerful, Flexible and Comprehensive Scholarship Management Solution
Strand 7 - Level 2

Simplifying R2T4: Findings from NASFAA’s Task Force
Strand 10AB - Level 2
### CONFERENCE SCHEDULE

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<th>Time</th>
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<td>10:15am - 11:15am</td>
<td>The Reward for Doing a Good Job is More Work!</td>
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<td>Reflecting a Changing Society: Diversity in the Hiring Process</td>
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<td>Improving the Campus-Based Aid Allocation Formula</td>
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<td>Celestin GH - Level 3</td>
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<td><strong>F</strong> Impact of Award Displacement on Students: Mitigating Practices &amp; Solutions</td>
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<td>Celestin BC - Level 3</td>
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<td>Improving Student Solutions from Federal Policy Change</td>
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<td>It's Not Just About Equity Anymore!</td>
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<td>150% - A Life Cycle Overview</td>
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<td><strong>F</strong> SoFi: Student Loan Refinancing 101</td>
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<td><strong>F</strong> Best Practices for Improving Your Cohort Default Rate</td>
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<td>11:30am - 1:30pm</td>
<td>Awards Luncheon &amp; Annual Business Meeting</td>
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<td>Empire Ballroom - Level 2</td>
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<td>1:30pm - 4:15pm</td>
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<td>NASFAA's 50th Anniversary Information Desk</td>
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<td>Elite Foyer - Level 1</td>
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<td>1:45pm - 2:45pm</td>
<td><strong>F</strong> How to Say No: Improving Responses to Award Appeals</td>
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<td>Compliance Officer: Do You Need Me?</td>
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<td><strong>F</strong> Encouraging Good Behavior: Lowering Defaults Through Early Consumer Info</td>
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<td>A Financial Aid Director's Guide to Trending Legal Issues</td>
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<td>Celestin GH - Level 3</td>
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<td>Repayment Plans</td>
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<td>Celestin D - Level 3</td>
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<td>150% - A Life Cycle Overview</td>
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<td><strong>F</strong> Joining Forces to Deliver Student Opportunity</td>
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<td>FAFSA Simplification: Finding the Right Way</td>
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<td>Strand 12AB - Level 2</td>
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<td>1:45pm - 4:00pm</td>
<td><strong>H</strong> NASFAA U - Cost of Attendance</td>
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<td>Celestin A - Level 3</td>
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<td><strong>H</strong> Leading Up, Down and All Around</td>
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<td>Celestin BC - Level 3</td>
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CONFCERENCE SCHEDULE

3:00pm - 4:00pm
- **Tune Up Your Compliance - Part Deux**
  Celestin GH - Level 3
- **Hiring, Training and Promoting the Emerging Leaders**
  Strand 11AB - Level 2
- **The State University of New York’s Approach to Student Retention**
  Strand 13AB - Level 2
- **Legislative Update from the Graduate and Professional Perspective**
  Strand 12AB - Level 2
- **Advanced Techniques in Social Media**
  Celestin F - Level 3
- **Repayment Plans**
  Celestin D - Level 3
- **Federal Town Hall**
  Celestin E - Level 3
- **Program Review Essentials & Top 10 Compliance Findings**
  Strand 10AB - Level 2
- **AcademicWorks: Comprehensive Scholarship Management Solution**
  Strand 1 - Level 2

4:00pm - 4:15pm
- **Break - Sponsored by National Student Clearinghouse**
  Celestin & Strand Foyers and Elite Hall - Levels 1, 2 & 3

4:15pm - 5:15pm
- **Title IV, Veterans & Military Benefits Administration at a Crossroads**
  Celestin GH - Level 3
- **Happy Staff, Happy Life**
  Strand 11AB - Level 2
- **Responsible Borrowing Initiatives**
  Strand 13AB - Level 2
- **Graduate/Professional Orientation Changing Practices**
  Strand 12AB - Level 2
- **Reviewing the Results of the Loan Servicing Issues Task Force**
  Celestin F - Level 3
- **Verification for 2016-17**
  Celestin D - Level 3
- **NSLDS Update**
  Celestin E - Level 3
- **How Can Research be More Relevant to Practice? A Facilitated Discussion**
  Imperial 3 - Level 4
- **Inside the Beltway: NASFAA Federal Update**
  Strand 10AB - Level 2

4:15pm - 11:55pm
- **Exhibit Hall Tear-Down**
  Elite Hall - Level 1

**Wednesday, July 22**

8:30am - 11:00am
- **Closing Breakfast and General Session**
  Empire Ballroom - Level 2
IT’S NOT JUST ABOUT THE TEST

With all my years of experience, I was worried I wouldn’t pass.

Then I thought to myself, I help students every day. I know what I’m doing.

Earning credentials is about strengthening what I already know so I can continue to help students as the financial aid regulations change and evolve.

Earning credentials tells my boss, my staff, my students, and the world, I have what it takes to be successful and I know what I’m doing in the financial aid office.

NASFAA University Credentials. Earn yours today.

Choose from 16 Credentials!

Part 1
Application Process
Student Eligibility
Cost of Attendance
Federal Methodology
Verification

Part 2
Federal Pell Grants
Campus-Based Programs
TEACH
Direct Loans
Packaging

Part 3
Return of Title IV Funds
Professional Judgment
Satisfactory Academic Progress
Cash Management
Consumer Information
Administrative Capability

For new financial aid professionals, NASFAA recommends moving through the credentials in the order shown; however, this sequence is not a requirement.
Sunday  
2:30pm - 3:30pm

Making Determinations of Unaccompanied Homeless Youth Status  
Celestin GH - Level 3

The CCRAA amended the definition of independent student to include several new populations, including unaccompanied homeless youth. To be independent, students must have a yearly determination of their status. Data from the Department of Education shows school district liaisons make the majority of determinations each year. Because these professionals can only make determinations for incoming students and space in qualifying shelters is limited, many students need to have financial aid administrators (FAAs) make determinations. This session will review the process FAAs should use to make determinations, including appropriate documentation. Scenarios will be used to illustrate the process and encourage discussion.

Moderator:  
Jennifer Martin, Director of Content Management, NASFAA

Speakers:  
Cyekeia Lee, Director of Higher Education Initiatives, National Association for the Education of Homeless Children and Youth  
Richard Heath, Director, Student Financial Services, Anne Arundel Community College  
Jennifer Martin, Director of Content Management, NASFAA

Student Loan Repayment Through Employer Withholding  
Celestin F - Level 3

NASFAA, New America, and Young Invincibles, in partnership with the Urban Institute and the Chamber of Commerce, have been working together through a grant from the Bill & Melinda Gates Foundation. The grant examined the implementation challenges surrounding automatic enrollment of all student loan borrowers in income-based repayment, with a particular focus on the feasibility and design of employer withholding of student loan payments. This interactive session will explain and discuss the findings of the consortium as part of the third phase of the Reimagining Aid Design and Delivery project.

Speakers:  
Karen McCarthy, Senior Policy Analyst, NASFAA  
Alex Holt, Policy Analyst, Education Policy Program, New America  
Jennifer Wang, Policy Director, Young Invincibles

Innovative New Programs - How to Remain in Compliance in a Changing Landscape  
Strand 12AB - Level 2

In an increasingly competitive marketplace, schools, especially at the graduate and professional level, are developing “innovative” new programs to fulfill their enrollment goals. Sometimes, the financial aid office is the last to know about these new programs. Sometimes, these new programs present challenging compliance problems. In this session, we will identify strategies for staying abreast of new program developments on campus and identify best practices for budgeting and awarding Title IV financial aid for students in these programs within the current regulatory framework.

Moderator:  
Gina Soliz, Director of Financial Aid, Syracuse University College of Law

Speakers:  
Terri Elizabeth LeGrand, Associate Director for Compliance, Wake Forest University  
Thomas Benza, Associate Director, Wake Forest University

A Collective and Pioneering Methodology to Student Financial Literacy  
Strand 13AB - Level 2

In this session, the University of Oklahoma, will demonstrate how they have integrated Financial Literacy on campus. The transformation took place via the creation of a for credit personal finance course called “9 Things Every College Student Should Know About Money,” the development of the Early Detection and Intervention of Financially At Risk Students program, and a variety of financial literacy outreach efforts. OU has created a culture of financially cognizant students. This session will include information on best practices for developing a financial literacy program, showcase lessons learned, and illustrate outcomes.

Moderator:  
Jonna Raney, Director of Student Financial Services, Oklahoma Baptist University

Speakers:  
Brad Burnett, Associate Vice President for Student Financial Services, University of Oklahoma  
Shana Stanton, Coordinator, University of Oklahoma  
Judi Voeller, Associate Director, Grants and Special Projects, University of Oklahoma
SESSION DESCRIPTIONS

SUNDAY 2:30pm - 3:30pm

**It’s All in the Game!**
*Strand 11AB - Level 2*

Financial aid training doesn’t have to be boring! Engaging staff in interactive training builds their confidence as they learn and lets you (the trainer) know right away if staff “get it.” Staff will retain more information if they have a good time while learning. Come away from this session with tips for trainers and practice games you can play to get your message across for both new and seasoned staff. Training staff about conflicting data, professional judgment, policies & procedures, packaging, and counseling can be fun for everyone. Get creative and get staff involved!

*Moderator:*
Leslie Bridson, Director, Financial Aid, Massachusetts Institute of Technology

*Speakers:*
Jana Haile, Associate Director, Boston University
Julie Wickstrom, Director of Financial Assistance, Boston University

**From “Schoolhouse Rock” to IFAP**
*Celestin A - Level 3*

This session will explore the path of education bills through Congress and through regulation development. This session will also assist participants in understanding the difference between “statute,” “regulation,” “Dear Colleague Letter,” “FSA Handbook” and other everyday desk guidance we use in the financial aid office.

*Moderator:*
Nancy Ferguson, Senior Assistant Director of Programs, University of Georgia

*Speakers:*
Philip Hawkins, Director of Financial Aid, University of West Georgia
Anthony P. Jones, Assistant Professor, Appalachian State University

Federal Town Hall
*Celestin D - Level 3*

Presenters from the U.S. Department of Education will take questions from the audience on any number of different topics covered at the conference.

*Moderator:*
Bridgette Betz, Director, Missouri University of Science and Technology

*Speakers:*
Jeff Baker, Federal Student Aid, U.S. Department of Education
Lynn Mahaffie, Senior Director, Policy Coordination, Development and Accreditation, U.S. Department of Education
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
Justin Draeger, President and CEO, NASFAA
Dan Mann, 2015-16 NASFAA National Chair and Director of Financial Aid, University of Illinois at Urbana-Champaign
Eileen O’Leary, 2014-15 NASFAA National Chair and Assistant Vice President Student Financial Services, Stonehill College

R2T4 - Credit Hour Programs
*Celestin E - Level 3*

This session will focus on the Return of Title IV funds provisions when a student withdraws from a credit hour program.

*Moderator:*
Allison Sullivan, Director of Financial Aid, Anderson University

*Speakers:*
Dan Klock, Program Specialist, Federal Student Aid, U.S. Department of Education
David Musser, Program Specialist, U.S. Department of Education

NASFAA Management Benchmarking Task Force
*Strand 10AB - Level 2*

NASFAA plays a vital role in helping professionals stay on top of industry trends and compare themselves to similar institutions. In an effort to streamline our two ongoing benchmarks, a staffing and salary survey, NASFAA convened a task force to examine how these benchmarks may be updated and redesigned to better fit the needs of our members. This session will give an in-depth review of the task force finding and recommendations, as well as allow members an opportunity to review NASFAA’s redesigned benchmarking survey and provide feedback before it is distributed this fall.

*Moderator:*
Charlotte Etier, Research Analyst, NASFAA

*Speakers:*
Charlotte Etier, Research Analyst, NASFAA
Dan Davenport, Director of Admissions/Financial Aid, University of Idaho
3:45pm - 4:45pm

Communicating Value vs. Price - Why Transparency is Key

Strand 13AB - Level 2

The University of Findlay changed the way it interacts with students and families about paying for college. The university embarked on a multi-level program that eliminated autonomy between admissions, financial aid and the business office to become clearer about the cost of college. Findlay also moved away from the Net Price Calculator, and developed a Total Degree Cost Calculator, allowing students to know up-front the cost of a Findlay education. The results are evidence of the efforts success - 8.5 percent enrollment increase, decreased communication from confused students, increased traffic on the offices’ websites and an increase in net tuition revenue.

Moderator:
Edward R Recker, Director of Financial Aid, The University of Findlay

Speakers:
Edward R Recker, Director of Financial Aid, The University of Findlay
Joseph Spencer, Associate Director of Financial Aid, The University of Findlay
Rebecca Jenkins, Director of Marketing and Communication, The University of Findlay

Federal Update on HRSA’s Title VII and VIII - Student Loans and Scholarships

Strand 12AB - Level 2

This session will review and update attendees on the recent loan and scholarship requirements as well as the performance measure outcomes concerning the Scholarship for Disadvantaged Students as well as the Primary Care Loan, Loan for Disadvantaged Students, Nursing Student Loan, and Health Professions Student Loan programs.

Moderator:
Deidra Cummings, Counselor, Lipscomb University

Speaker:
Charles Carpenter, National Health Service Corps

Innovative Strategies for Diversity in the Financial Aid Office

Celestin F - Level 3

Financial aid administrators interact with diverse student populations and it is important to understand the multiple cultures and perspectives of all students. To gain insight and better serve students, a diverse staff is needed to understand student backgrounds and their needs. This session will share the importance of examining the challenges to traditional workplace diversity efforts and provide innovative strategies. Drawn from Laura Liswood’s book “The Loudest Duck,” strategies discussed focus on creating effective workplaces while ensuring diverse, level playing fields for staff in order to retain talent that provide services to support student success in different ways.

Moderators:
Wayne Harewood, Director of Financial Aid, Kingsborough Community College
Robert Weinert, Financial Aid Specialist, Cuesta College

Speakers:
William Lindsey, Proprietary Sector Representative, Pennsylvania Higher Education Assistance Agency (PHEAA)
Rosemary Martinez-Kepford, School Relations Director, ECMC
Robert Weinert, Financial Aid Specialist, Cuesta College

Award Letters: Decoding with Students and Families

Celestin A - Level 3

For many students the college decision is on hold until the financial aid award letter arrives. Award letters help students and their families understand their financial responsibilities, yet the lack of standardization makes these award letters very confusing. Confusion can start with the amount of money awarded, but also the timing, the terminology used, and the real impact of its contents on students and their families. This session will review different award letters, highlight best practices and potential improvements, and allow time for collaboration around award letter practices that can increase understanding and have a positive impact on students.

Moderator:
Ali Caccavella, Director of Training and Partnerships, uAspire

Speakers:
Ali Caccavella, Director of Training and Partnerships, uAspire
Valerie Miller, Director, Student Financial Aid and Scholarships, Ohio University
Verification for 2016-17
Celestin D - Level 3
This session will discuss verification requirements for 2016-17, including FAFSA data subject to verification, changes to verification tracking groups, and acceptable documentation.

Moderator:
Elizabeth Garcia, Financial Aid Advisor, Pasadena City College
Speaker:
Carney McCullough, Director, Policy Development Group, U.S. Department of Education

R2T4 - Module Programs
Celestin E - Level 3
This session will focus on the Return of Title IV funds when a student withdraws from a program that is either taught in modules or has modules in the program. Examples will be discussed for both clock hour and credit hour programs.

Moderator:
Denise Welch, Director of Financial Aid, Panola College
Speakers:
Dan Klock, Program Specialist, Federal Student Aid, U.S. Department of Education
David Musser, Program Specialist, U.S. Department of Education

Examining Trends & Solutions in Administrative Burden
Strand 10AB - Level 2
In January 2015, as follow-up to its 2010 study, NASFAA surveyed financial aid professionals at its member institutions in an effort to better understand how ongoing regulatory changes are affecting college financial aid offices. The 2015 NASFAA Administrative Burden Survey (published April 2015) shows widespread concern about resource shortages felt by aid administrators. Further, trend data shows that these shortages are not short-term challenges, but rather permanent structural problems without foreseeable reprieve. This session will review the findings of the 2015 study, trends from 2010 to 2015, and related policy recommendations.

Moderator:
Megan McClean, Managing Director of Policy & Federal Relations, NASFAA
Speakers:
Megan McClean, Managing Director of Policy & Federal Relations, NASFAA
Charlotte Etier, Research Analyst, NASFAA

Monday

10:15am - 11:15am
Innovative Tools to Enhance Your NASFAA Membership Experience
Celestin F - Level 3
This session will provide a guided tour through some of the ways NASFAA supports members with online tools and services, including the newly redesigned NASFAA website, the Student Aid Index, and AskRegs. A demonstration of the revised website will highlight a variety of new and innovative solutions and tools to make the most of your NASFAA membership, and examples from your peers will illustrate how useful the Student Aid Index and AskRegs services can be in your aid office.

Moderators:
Jennifer Williams, Assistant Director for Systems and Technology, Clemson University
Brian Lemma, Associate Director, Georgetown University
Speakers:
Scott Cline, Director of Financial Aid, California College of the Arts
Ashley Smith, Financial Aid Specialist, Montgomery County Community College
Shannon L. Crossland-Followill, Associate Director, Admin. Maintenance & Compliance, Texas Tech University
Carrie Conrad, Web Strategy Manager, NASFAA Staff Liaison

The Big Idea in Student Aid: NASFAA’s Policy Challenge - Round 1
Strand 11AB - Level 2
For the past several years NASFAA has been engaged in various projects to reimagine and redesign student financial aid. NASFAA will be giving the microphone over to presenters who have the most imaginative, revolutionary, or simple idea that could help solve some of the toughest higher education challenges through some change to student financial aid. Presenters will be judged on their policy idea by audience members, NASFAA leadership, higher education experts, and celebrity guests. The judges will determine which contestant has the policy idea with the greatest potential, and win a grand prize: funding to begin exploring the contestant’s idea.

Moderator:
Justin Draeger, President and CEO, NASFAA
New Research and College-Level Policies to Help Students Borrow Responsibly
Celestin GH - Level 3

Media reports and policy discussions at the national, state, and college level continue to highlight concerns about growing student debt and raise questions about how to help students borrow responsibly. During this interactive session, financial aid experts will share the latest data on student borrowing and offer perspectives on how colleges can approach the issue of student debt through their financial aid awarding policies, loan counseling, and other outreach with students and families. Participants will be invited to join the discussion about policies and practices that support wise decision-making about borrowing and other ways to pay for college.

Moderator:
Diane Cheng, Senior Research Analyst, The Institute for College Access & Success, Inc.

Speakers:
Diane Cheng, Senior Research Analyst, The Institute for College Access & Success, Inc.
Kevin Jensen, Dean of Enrollment & Student Services, College of Western Idaho
James Kennedy, Director, University Financial Aid, Indiana University - University Student Services and Systems

Leveraging Financial Aid to Expand Student Opportunities
Strand 13AB - Level 2

At University of Chicago low-income students were self-selecting out of study abroad and career preparation programs over fear of cost. Partnering with Career Advancement, the financial aid office created funding opportunities and communications to allow all students access to these experiences. The office also simplified the student experience of requesting funds and worked to educate students and campus partners about the opportunities available.

Moderator:
Monica Kramer, Director of Business Process Improvements, University of Chicago

Speakers:
Amanda Fijal, Executive Director, University Financial Aid, University of Chicago
Meredith Daw, Assistant Vice President, University of Chicago

The Future of PSLF: Recommendations, Reauthorization, and Beyond
Strand 12AB - Level 2

In August of 2014, NASFAA released a task force report on ways to improve and strengthen the Public Service Loan Forgiveness program. This session will highlight those recommendations and provide updates on recent legislation or administrative action related to the program. You will also hear from the servicer of these loans about the characteristics of this cohort as we approach 2017 and the initial threshold for forgiveness.

Moderator:
Karen McCarthy, Senior Policy Analyst, NASFAA

Speakers:
Candance Frazier, Associate Director, West Virginia University
Lisa Ciritella, Pennsylvania Higher Education Assistance Agency (PHEAA)

Federal Town Hall
Celestin D - Level 3

Presenters from the U.S. Department of Education will take questions from the audience on any number of different topics covered at the conference.

Moderator:
Ben Burton, Chief Financial Student Resources Officer, Ivy Tech Community College of Indiana

Speakers:
Jeff Baker, Federal Student Aid, U.S. Department of Education
Lynn Mahaffie, Senior Director, Policy Coordination, Development and Accreditation, U.S. Department of Education
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
Megan McClean, Managing Director of Policy & Federal Relations, NASFAA
Dan Mann, 2015-16 NASFAA National Chair and Director of Financial Aid, University of Illinois at Urbana-Champaign
Eileen O’Leary, 2014-15 NASFAA National Chair and Assistant Vice President Student Financial Services, Stonehill College

Gainful Employment
Celestin E - Level 3

This session will provide an overview of the Gainful Employment regulations that will go into effect on July 1, 2015, as well as information on the Gainful Employment disclosure requirements currently in effect.

Moderator:
Joseph A Bailey, Assistant Dean for Enrollment Services & Director of Financial Aid, Genesee Community College

Speakers:
Cynthia Hammond, U.S. Department of Education
Greg Martin, U.S. Department of Education
SESSION DESCRIPTIONS
MONDAY 10:15am - 12:30pm

NSLDS Update
Strand 10AB - Level 2
This session will recap the changes made in 2015 to the National Student Loan Data System’s (NSLDS) websites, reports for schools, and enrollment reporting changes. Attendees will also hear about NSLDS changes planned for 2016.

Moderator:
Sean McGivney, Director of Financial Aid, Colorado State University-Pueblo

Speaker:

Student Self-Service: The Future of Financial Aid
Strand 1 - Level 2
Have you heard from students: “Navigating financial aid is just too hard” and they want you to do it for them? Creating a custom self-service experience for financial aid processes can be difficult, time consuming, and IT dependent. CampusLogic has developed a comprehensive and consistent student experience that spans the financial aid life cycle. Allowing students to complete tasks in a mobile friendly environment that supports customized forms, e-signature, dynamic content, logic driven task assignment, and multiple communication channels. Come learn how you can revolutionize the financial aid experience through self-service. Your student will thank you.

Speakers:
Chris Chumley, Chief Operating Officer, CampusLogic, Inc.
Gregg Scoresby, CEO, CampusLogic, Inc.
Amy Kearns, Vice President of Client Services, CampusLogic

10:15am - 12:30pm

NASFAA U - Professional Judgment
Celestin A - Level 3
This session will discuss Professional Judgment (PJ) principles and special circumstances that may warrant PJ, including possible considerations, potential adjustments, and examples of documentation.

Moderator:
Tiffany Gibbs, Training Specialist, NASFAA

Speakers:
Tiffany Gibbs, Training Specialist, NASFAA
David Futrell, Training Specialist, NASFAA
Eileen Welsh, Training Specialist, NASFAA

11:30am - 12:30pm

Working with Undocumented Students; Deferred Action for Childhood Arrivals
Strand 13AB - Level 2
This session will examine the federal and state laws regarding financial aid eligibility for Deferred Action for Childhood Arrivals (DACA) students. There is often much confusion on how we can best serve these students as laws vary by state. We will hear from a legal expert on how best to work with these students who have self-identified, as well as students who may not have applied for DACA status but may be eligible. Our legal expert will provide us with resources to work with this growing population. Best practices will be identified and discussed.

Moderator:
Nathan Basford, Sr. Financial Aid Administrator, The Florida State University

Speakers:
Joan D Bailey, Assistant Director, St. Petersburg College
Francisco Valines, Director of Financial Aid, Florida International University
JoEllen Soucier, Executive Director of Financial Aid, Houston Community College System
Ignacia Rodriguez, Equal Justice Works Fellow, Sponsored By Greenberg Traurig, National Immigration Law Center
Educating the Department of Education and Congress About Graduate Education
Strand 12AB - Level 2
Graduate and professional financial aid administrators (seem) to always be working at a disadvantage. Most, if not all laws and regulations are targeted to the undergraduate community. In this session, presenters will show examples of how a variety of pieces of legislation have stymied graduate and professional financial aid administrators as to how to interpret these laws and regulations to fit graduate level curricula, which are very different from undergraduate curricula.
Moderator:
Karen McCarthy, Senior Policy Analyst, NASFAA
Speakers:
Megan McClean, Managing Director of Policy & Federal Relations, NASFAA
Michael Goodman, Associate Vice President, Financial Aid, Tulane University

Leveraging Analytics to Drive Financial Aid Counseling Strategy
Celestin F - Level 3
Does your institution struggle with providing effective financial counseling due to limited resources? Learn how Capella University leverages analytics and targeted counseling to provide a personalized experience with limited resources. Key concepts to be discussed include: leveraging analytics to identify opportunities, segmenting your student population for targeted outreach, measuring results, and successfully advocating for resource allocation within your school.
Moderator:
Kate Kelley, Capella University
Speakers:
Jarod Paulson, Associate Director of Financial Aid, Capella University
Timothy Eaton, Manager of Learner Financial Services, Capella University

Minimizing Liabilities in an ED Program Review
Celestin GH - Level 3
This session will cover strategies to help you prepare for, and survive, a Department of Education program review. Experienced presenters, including campus financial aid directors and an attorney who has advised numerous schools on navigating ED program reviews, will provide specific suggestions about how to prepare in advance of the program review, manage the on-site visit, develop an effective internal program review team, respond to the program review report, and more. They will illustrate their presentation with specific “war stories” and involve the audience in offering tips on approaches that have worked well, or not so well, in prior program reviews.
Moderator:
Anne Sullivan Polino, System Director of Financial Aid, Bryant & Stratton College
Speakers:
Blain Butner, Co-Chair Higher Education Practice, Cooley LLP
Kathy Cheatham, Senior Vice President of Student Finance, Education Corporation of America Virginia College
Matthew Moore, Director of Financial Aid & Scholarships, Sinclair Community College

Consumer Information Requirements
Celestin D - Level 3
This session will focus on the consumer disclosure requirements that have generated attention and questions over the last several years, such as the memorandum of understanding, executive orders, financial aid shopping sheet and net price calculator. In addition to reviewing the requirements, Department of Education officials will review the tools and resources that are available to help institutions comply with the consumer information provisions.
Moderator:
Susan Swisher, Executive Director, Saint Xavier University
Speakers:
Ashley Higgins, U.S. Department of Education
David Bartnicki, Training Officer, U.S. Department of Education

Gainful Employment
Celestin E - Level 3
This session will provide an overview of the Gainful Employment regulations that will go into effect on July 1, 2015, as well as information on the Gainful Employment disclosure requirements currently in effect.
Moderator:
Sara Holman, Director of Financial Aid, Lawrence University
Speakers:
Cynthia Hammond, U.S. Department of Education
Greg Martin, U.S. Department of Education
Privacy and Data Protection
Strand 10AB - Level 2
More than 1.2 billion username/password combinations have been stolen in a series of Internet heists affecting 420,000+ websites. Yearly, incidents of major data loss occur at postsecondary educational institutions, potentially compromising the personal data of parents, students, faculty, and alumni. Are you protected? Do you know what to do if there is a data breach?

This session defines what you need to know, including: Personally Identifiable Information; sensitivities a breach presents; possible mitigation strategies to avoid a data breach; and steps schools should take if a data breach occurs.

Moderator:
Matthew Stokan, Director of Financial Aid, Waynesburg University
Speaker:
Linda Wilbanks, Director, IT Risk Management, U.S. Department of Education

The Redesigned SAT and Financial Aid
Strand 1 - Level 2
The redesigned SAT will focus on what evidence shows matters most for success in college. Learn more about how the SAT is changing and what these changes may mean for your financial aid and admission office. We will discuss potential implications for financial aid systems and scholarship programs. Attendees will have the opportunity to discuss institutional best practices, including collaborations with admissions and how to get the most out of the redesigned assessment. Details on the timeline, critical new components, and scoring improvements will be included.

Moderator:
Joseph Farrell, Director, Financial Aid Software Products, The College Board
Speaker:
Jill Oakley-Jeppe, Educational Manager, The College Board

FluidReview by SurveyMonkey: A Powerful, Flexible and Comprehensive Scholarship Management Solution
Strand 7 - Level 2
Join FluidReview by SurveyMonkey to learn how academic institutions around the world have improved the utilization, management and stewardship of their scholarship funds with a comprehensive scholarship management solution. In this session, we’ll cover how you can enhance service to students and donors, effectively match students to scholarship opportunities across your campus, boost application volumes and create administrative efficiencies across every step of the process.

Moderator:
Rafal Deren, FluidReview By SurveyMonkey
Speaker:
Sean Clancy, FluidReview By SurveyMonkey

Examining NCAA Rule Changes and Cost of Attendance
Strand 11AB - Level 2
In January 2015, the members of the NCAA voted to expand the scope of athletic scholarships to cover expenses such as academic-related supplies, transportation, and other similar items for athletes. This session focuses on changes to NASFAA's guidance on cost of attendance and athletic aid, and how schools are reacting to these NCAA changes.

Speakers:
Justin Draeger, President and CEO, NASFAA
Richard Shipman, Director, Michigan State University

3:15pm - 4:15pm
Helping Students Make Good Financial Decisions
Strand 13AB - Level 2
Building and maintaining good credit scores paves the way for students who are interested in ensuring a strong financial future. The panel, which will include a representative from Fair Isaac Corporation (FICO), will discuss the importance of FICO Score awareness and how to educate students on FICO Scores. In addition, members of the financial aid community will discuss some of the tools, resources and distribution methods they employ to help educate students.

Moderator:
Karen E Foust, Managing Director, Sallie Mae
Speakers:
Jenelle Dito, Principal Consultant, FICO
Ron Day, Director of Financial Aid, Kennesaw State University
Venus M Puliafico, Director of Financial Aid, Case Western Reserve University
Lisa Mitchell, Vice President, Region Head, Sallie Mae

Two Loan Disbursements + Midterm Grades = Increase in Student Success!
Celestin GH - Level 3
Lorain County Community College (LCCC) recently moved to two disbursements of student loans per term in an attempt to increase student success while decreasing student loan fraud and default. This session will detail the campus wide engagement process used, mechanics of changing to multiple disbursements in a term, implementation of midterm grades including a Failure Administrative Withdrawal (FAW), and the communication strategy implemented to notify students. This action project crossed several departments and took a team effort creating greater synergy towards student success and creating greater awareness of the role financial services plays.

Moderator:
Marcia Ballinger, Provost/Vice President for Academic and Learner Services, Lorain County Community College
Specators:
Stephanie Sutton, Dean of Enrollment & Financial Services/Registrar, Lorain County Community College
Valerie Fultz, Financial Services Assistant, Lorain County Community College
The Many Hats and Faces of a Director
Celestin BC - Level 3

Many times we are placed in positions we find a bit uncomfortable. Sometimes we are called to be “on the spot” experts. This lab will explore ways you can gracefully and articulately survive these moments by employing tricks of the theater. We will consider ways in which to keep the nerves steady and make the result extraordinary!

Speaker: Barbara Miller, Director of Financial Aid, Stevenson University

Financial Literacy - Grad Students: Highly Intelligent v. Financially Savvy
Strand 12AB - Level 2

This session provides valuable data specific to the unique challenges faced by graduate and professional schools surrounding their students' financial literacy. The use of borrowing statistics to develop and implement an effective strategy will be explained. Actual case studies will be showcased profiling the live programs in use by the presenters today and special attention will be given to the importance of engaging delivery methods such as the “Flipped Classroom” format.

Attendees will leave with clearly defined suggested action steps to either develop or increase the effectiveness of their existing financial literacy initiative on campus.

Moderator: Donna Miller, Director of Business Development, iGrad
Speakers: Jill Stone, Director of Financial Aid, Yale Law School, Yale University Law School
Anthony Sozzo, Associate Dean for Student Affairs and Student Financial Planning, New York Medical College
Jennifer Markham Hulvey, Director of Financial Aid, University of Virginia School of Law

NCAA - An Update on Division I Financial Aid Legislation
Strand 11AB - Level 2

This session, intended for NCAA Division I schools, will provide an update on issues affecting NCAA Division I financial aid legislation to help prepare you to discuss these issues on your campus and within your conference.

Moderator: Karen Krause, Executive Director Financial Aid, Scholarships, & Veteran’s Affairs, University of Texas at Arlington
Speaker: Kris Richardson, Director of Academic and Membership Affairs, National Collegiate Athletic Association

Holistic Campus Solutions - Collaborating Towards Student Retention & Success
Celestin A - Level 3

As the higher education landscape shifts, institutions must adapt to meet increasingly high expectations for accountability from multiple stakeholders who demand return on investment and specific performance outcomes. Success depends on our capacity to leverage limited resources and foster a more holistic approach to better serve students. This session highlights innovative collaborations at two large public universities – “Collaborate to Graduate” and “Financial Aid Competencies for Academic Advisors” – and shares best practices for how to cultivate a community of practice, focused on accomplishing shared goals for student retention and success.

Moderator: Silvia Marquez, Associate Director, University of California, Berkeley
Speaker: Rachelle Feldman, Assistant Vice Chancellor and Director of Financial Aid, University of California, Berkeley

Consumer Information Requirements
Celestin D - Level 3

This session will focus on the consumer disclosure requirements that have generated attention and questions over the last several years, such as the memorandum of understanding, executive orders, financial aid shopping sheet and net price calculator. In addition to reviewing the requirements, Department of Education officials will review the tools and resources that are available to help institutions comply with the consumer information provisions.

Moderator: David W Janey, Associate Director, Financial Assistance, Boston University
Speakers: Ashley Higgins, U.S. Department of Education
David Bartnicki, Training Officer, U.S. Department of Education
COD Update

Celestin E - Level 3
This session will describe the changes to the Common Origination & Disbursement (COD) System for award year 2015-2016. We’ll talk about modifications to the system to comply with new Direct PLUS Loan Program credit and counseling requirements, a new XML Schema for award year 2015-2016 data, a new system-generated response, a new report, and where and how to find data relative to the changes. We’ll also cover a few new edits, a couple changes toAbility To Benefit, and what you’ll no longer see coming from COD.

Moderator:
Mary Horgan, Assistant Director, University of Michigan - Flint

Speaker:
Wood Mason, Business Operations & Program Services, U.S. Department of Education

Verification for 2016-17

Strand 10AB - Level 2
This session will discuss verification requirements for 2016-17, including FAFSA data subject to verification, changes to verification tracking groups, and acceptable documentation.

Moderator:
Donna Kolb, Sr. Associate Director, University of Florida

Speaker:
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
Tuesday

9:00am - 10:00am

Graduate/Professional Town Hall Meeting
Strand 12AB - Level 2

This town hall meeting will provide an opportunity for NASFAA graduate and professional aid administrators to discuss issues and concerns directly with NASFAA leadership to ensure the needs of graduate and professional members are met.

Moderator:
Mary B. W. Fenton, Director, Student Financial Aid Services, The University of New Mexico Health Sciences Center

Speakers:
Dan Mann, 2015-16 NASFAA National Chair and Director of Financial Aid, University of Illinois at Urbana-Champaign
Justin Draeger, President and CEO, NASFAA
Eileen O’Leary, 2014-15 NASFAA National Chair and Assistant Vice President Student Financial Services, Stonehill College

Evaluating & Reporting the Effectiveness of Online Communication w/Students
Strand 11AB - Level 2

When resources are limited, it’s important to focus efforts on communication that produces results. Do you know how effective your emails or website are at reaching students? This session will discuss how three departments are currently measuring their email and website communications. Suggestions for simple free or low-cost measurement tools will be included. We will also discuss how to appropriately report on the effectiveness of online communication to various campus stakeholders, and how to use these reports to improve your department’s communication efforts.

Moderator:
Crystal Bruntz, Director of Financial Aid, Avila University

Speakers:
Chandra Owen, OFA Training Coordinator, Michigan State University
Joseph Donlay, Associate Director, Operations, Colorado State University
Ofelia Morales, Associate Director of Client Services, University of Colorado Boulder
Liz Gross, Social Media & Market Research Strategist, Great Lakes Higher Education Corporation & Affiliates

Financial Aid Tool Box - A-Z
Celestin BC - Level 3

This session will provide attendees with a wealth of informational resources necessary to run the day-to-day operations of a financial aid office on just about any type of campus.

Speakers:
Marvin Smith, Director, Indiana University-Purdue University Indianapolis
Bryan Erslan, Director of Student Financial Assistance, Eastern Kentucky University

R2T4 & Modules: Navigating the New Regulations from the Campus Perspective
Celestin GH - Level 3

The purpose of this session is to demonstrate how two universities identified the challenges of the Program Integrity Rules of R2T4 and Modules and established practices and procedures to meet those challenges. This session brings together a financial aid professional and a bursar to talk about the struggles and challenges of implementing R2T4 and modules. Each presenter will share his or her perspective about R2T4, defining a module and what each school does now to work through these issues.

Moderator:
Bill Mullane, Assistant Director of Bursar Operations, University of Cincinnati

Speakers:
Heather Boutell, Director, Financial Aid, Bellarmine University
Raymond Kimmel, Associate Bursar - Compliance, University of Cincinnati

Walking the Path: Behavioral Finance to Strengthen Financial Ed Outcomes
Strand 13AB - Level 2

As it pertains to financial matters, we often find an illogical divide between knowing the path and walking the path; hence informed individuals can often make what seem like very uninformed financial decisions. So, why do few financial education programs include any mention of how to address these deep-seated beliefs in order to affect behavior modification? This session will explore the basics of behavioral finance, and help you identify “money personalities.” Additionally, we’ll show you how to use instructional design methodology in your program development to ensure your message is taking hold on a psychological level.

Moderator:
Carissa Uhlman, Vice President of Student Success, Inceptia

Speakers:
Tracy Austin, Franklin University
Joel Gardner, Franklin University
Elijah Herr, Innovation Coordinator, Portland Community College
150% Direct Subsidized Loan Limits
Celestin D - Level 3
This session will provide an overview of the requirements for limiting Direct Subsidized Loan eligibility to the length of 150% of a student’s academic program. It will outline Department of Education and school processing requirements for tracking, monitoring, awarding/originating, and reporting Direct Loans and enrollment information. Presenters will suggest ways for schools to warn students who are approaching the 150% borrowing limit and will discuss the timeframes for implementation of the requirements.
Moderator: Anthony Erwin, Dean of Student Financial Services, Northeastern University
Speakers: Ian Foss, Program Specialist, U.S. Department of Education
Nathan Arnold, Office of Postsecondary Education, U.S. Department of Education

COD Update
Celestin E - Level 3
This session will describe the changes to the Common Origination & Disbursement System for award year 2015-2016. We’ll talk about modifications to the system to comply with new Direct PLUS Loan Program credit and counseling requirements, a new XML Schema for award year 2015-2016 data, a new system-generated response, a new report, and where and how to find data relative to the changes. We’ll also cover a few new edits, a couple changes to Ability To Benefit, and what you’ll no longer see coming from COD.
Moderator: Robin Darcangelo, Director of Financial Aid & Veterans Affairs, Solano Community College
Speaker: Wood Mason, Business Operations & Program Services, U.S. Department of Education

NASFAA’s Peer Review Program: Like An Audit But w/ Empathy & Advice
Celestin F - Level 3
If your school has not had a federal program review and you want to know what kinds of compliance exceptions are most common, you will want to attend this session. NASFAA’s Standards of Excellence team leaders will share the most commonly identified compliance exceptions noted in the past three years during reviews of postsecondary institutions across the country. They will share how these findings can be corrected and avoided in the future.
Moderator: Chuck Knepfle, Director of Financial Aid, Clemson University
Speakers: James White, Dean, Student Financial Services, Gonzaga University
Lois Kelly, Director of Financial Aid & Scholarships, California Polytechnic State University

Award Letters that Don’t Suck
Strand 1 - Level 2
Let’s be honest, no matter how much time and effort you have put into trying to create the best award letter for students, the message may be getting lost in translation, and it’s not your fault. SIS’s limit what you can do to make an engaging and informative award letter. Can you embed dynamic multimedia content in a digital format that is mobile friendly? If not, CampusLogic has the solution for you. Bringing together thought leaders in financial literacy, student communication, and the financial aid profession CampusLogic created AwardLetter. Join us to learn how to create a game changing AwardLetter.
Speakers: Chris Chumley, Chief Operating Officer
Amy Kears, Vice President of Client Services, CampusLogic
Gregg Scoresby, CEO, CampusLogic, Inc.

FluidReview by SurveyMonkey: A Powerful, Flexible and Comprehensive Scholarship Management Solution
Strand 7 – Level 2
Join FluidReview by SurveyMonkey to learn how academic institutions around the world have improved the utilization, management and stewardship of their scholarship funds with a comprehensive scholarship management solution. In this session, we’ll cover how you can enhance service to students and donors, effectively match students to scholarship opportunities across your campus, boost application volumes and create administrative efficiencies across every step of the process.
Moderator: Rafal Deren, FluidReview By SurveyMonkey
Speaker: Sean Clancy, FluidReview By SurveyMonkey

Simplifying R2T4: Findings from NASFAA’s Task Force
Strand 10AB - Level 2
In 2013 the NASFAA Board accepted a number of general recommendations concerning the statutory Return of Title IV Funds (R2T4) provisions as part of a larger Reauthorization task force study, but recommended a dedicated R2T4 task force to further explore how to simplify the R2T4 process. This session will present a summary of the R2T4 task force deliberations and review other specific recommendations concerning the return of Title IV funds for withdrawn students.
Speaker: Karen McCarthy, Senior Policy Analyst, NASFAA
9:00am - 11:15am

Financial Aid Issues in a Competency-Based Education Model
Celestin A - Level 3

Competency-based education (CBE) is one of the newer, game-changing models some policymakers and higher education leaders cite as a way to provide quality, yet affordable, postsecondary education. In the first half of this session, CBE practitioners will provide an introduction to the CBE academic delivery models, as well as an overview of the financial aid challenges and common issues. The second half of the session will include interactive, small group breakouts focused on responding to specific and common scenarios. The session will expand your CBE knowledge and explore alternatives for effective aid delivery.

Moderator:
Elena Olivier, Default Prevention Coordinator, San Jacinto College

Speakers:
Robert Collins, Vice President of Financial Aid, Western Governors University
Sally Johnstone, Western Governors University

10:15 am - 11:15 am

The Reward for Doing a Good Job is More Work!
Strand 11AB - Level 2

Financial aid professionals are in a unique position to be successful campus leaders beyond the aid office. Three former aid directors discuss the challenges – both anticipated and unexpected – that come with accepting responsibility for additional offices and functions beyond the office of financial aid.

Moderator:
Michelle Trame, Senior Associate Director, University of Illinois at Urbana-Champaign

Speakers:
Paula Luff, Associate Vice President of Financial Aid, DePaul University
Zina Haywood, Executive Vice President, Provost, Gateway Technical College
Laurie Wolf, Executive Dean of Student Services, Des Moines Area Community College

Reflecting a Changing Society: Diversity in the Hiring Process
Strand 13AB - Level 2

Financial aid administrators, and anyone that works in the field of higher education, serve an increasingly diverse population of students. As the challenges facing students and those that care for and work with them change, it becomes more important the challenges are met with a staff that understands and even reflects those being served. Part of accomplishing this feat is through diversity within your staff. Diversity begins at recruitment and proceeds to the acquisition of a new hire. This session provides strategies for avoiding discrimination at the onset of the new hire process.

Moderator:
David D. Page, Vice President for Enrollment Management, Dillard University

Speakers:
Tiffany Gibbs, Training Specialist, NASFAA University
Isela Boehm, Associate Director, Johns Hopkins University, School of Nursing

Improving the Campus-Based Aid Allocation Formula
Celestin GH - Level 3

NASFAA’s Campus-Based Aid Allocation Formula Task Force was charged with developing reauthorization recommendations that would make the allocation formula more accurate and equitable and better reflect the comparative extent of the need of the student populations across institutions. Members of the task force will summarize the group’s discussions during their deliberations, and their final recommendations and the rationale for each.

Moderator:
Karen McCarthy, Senior Policy Analyst, NASFAA

Speakers:
Patricia Hurley, Associate Dean/Financial Aid Director, Glendale Community College
Mark L. Lindenmeyer, Assistant Vice President of Enrollment Management & Director of Financial Aid, Loyola University Maryland
Pamela Fowler, Executive Director, Office of Financial Aid, University of Michigan
Christine W McGuire, Associate Vice President for Enrollment and Student Affairs, Boston University
Impact of Award Displacement on Students: Mitigating Practices & Solutions  
Celestin BC - Level 3

The National Scholarship Providers Association (NSPA) released a white paper in 2013 about the impact of award displacement on students. We are interested in beginning a thoughtful and constructive dialog about award displacement and how to reach the common goals of colleges and universities, and external private scholarship providers, in assisting students to enter and complete higher education by maximizing all forms of financial aid. Please join us in this conversation to increase the awareness of the issue and learn from each other about laws and policies that create or exacerbate the impact of award displacement.

_Moderator:_
Amy Weinstein, Executive Director, National Scholarship Providers Association (NSPA)

_Speakers:_
Sharon Beers, Outside Scholarships and Grants Manager, University of North Carolina at Chapel Hill
Mark Kantrowitz, Senior Vice President and Publisher, Edvisors Network
David Levy, Editor, Edvisors Network

Improving Student Solutions from Federal Policy Change  
Strand 12AB - Level 2

NASFAA, National College Access Network (NCAN), and Ed Trust are working together to propose federal policy changes that will provide simplified and streamlined solutions for students on their pathway to a higher education credential. Presenters will share their research-based ideas on early awareness, FAFSA simplification, use of prior-prior year (PPY) income, Satisfactory Academic Progress (SAP) and reporting Pell Grant recipient graduation rates. This forum will be interactive, providing the audience with Q&A and the opportunity to participate in live polls on improving the proposed policy solutions. This work is part of the Reimagining Aid Design and Delivery project funded by the Bill & Melinda Gates Foundation.

_Moderator:_
Charlotte Etier, Research Analyst, NASFAA

_Speakers:_
Megan McClean, Managing Director of Policy & Federal Relations, NASFAA
Carrie Warick, Director of Partnerships and Policy, National College Access Network
Andrew Nichols, Director of Higher Education Research and Data Analytics, The Education Trust

It’s Not Just About Equity Anymore!  
Celestin F - Level 3

Increasingly, financial aid professionals are being asked to assess the impact of the financial aid award in attracting and retaining students. Changing how we view packaging financial aid is taking many of us to places we have never traveled. During this session we will hear how two public institutions have reconfigured financial aid awards to advance institutional goals using recruitment and retention data.

_Moderator:_
Billie Jo Hamilton, Assistant Vice President, Enrollment Planning & Management, University of South Florida

_Speakers:_
Lisa Blazer, Associate Vice President for Student Affairs, University of Texas at San Antonio
Mary Sommers, Director of Financial Aid, University of Nebraska at Kearney

150% Direct Subsidized Loan Limits  
Celestin D - Level 3

This session will provide an overview of the requirements for limiting Direct Subsidized Loan eligibility to the length of 150% of a student’s academic program. It will outline Department of Education and school processing requirements for tracking, monitoring, awarding/originating, and reporting Direct Loans and enrollment information. Presenters will suggest ways for schools to warn students who are approaching the 150% borrowing limit and will discuss the timeframes for implementation of the requirements.

_Moderator:_
Peg Mason, Assistant Director, Financial Aid, Colorado School of Mines

_Speakers:_
Ian Foss, Program Specialist, U.S. Department of Education
Nathan Arnold, Office of Postsecondary Education, U.S. Department of Education

150% - A Life Cycle Overview  
Celestin E - Level 3

This session presents an integrated systems life cycle overview of 150% processing. Three major Federal Student Aid (FSA) systems are used to implement Subsidized Usage Limit Applies (SULA) requirements – COD, NSLDS, and CPS. While each system has a unique role in receiving, evaluating, monitoring, storing, and reporting SULA data, all of the systems are linked and are mutually dependent. This session will focus on the beginning-to-end flow and use of SULA-related data, between schools, FSA systems, and FSA loan servicers.

_Moderator:_
Scotty Wallace-Juedes, Director of Student Financial Services, Wellesley College

_Speakers:_
Wood Mason, Business Operations & Program Services, U.S. Department of Education
**State Authorizations**
*Strand 10AB - Level 2*

This session will cover the state authorization requirements with which an institution must comply to be eligible for Title IV funding. Both policy and operational considerations will be addressed.

**Moderator:**
Jennifer Beck, Associate Director, Tulane University

**Speakers:**
Scott D Prince, Institutional Improvement Specialist, U.S. Department of Education
Sophia McArdle, Management/Program Analyst, U.S. Department of Education

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**1:45pm - 2:45pm**

**How to Say No: Improving Responses to Award Appeals**
*Strand 13AB - Level 2*

Writing an approval email or letter is fairly easy when responding to students’ and parents’ requests. At the same time, staff are too often challenged when replying to written requests for additional scholarships or other funding when the answer is no -- particularly when in the recruitment phase. Learn to pull apart the process and build skilled, appropriate responses that can even result in a “thank you” back from the family. Apply this straightforward approach to construct better academic progress, special circumstance, and other denials we have to put in writing.

**Moderator:**
Randy J. Ulses, Director for Scholarships & Enrollment, University of Cincinnati

**Speakers:**
Randy J. Ulses, Director for Scholarships & Enrollment, University of Cincinnati
Paula Luff, Associate Vice President of Financial Aid, DePaul University

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**A Financial Aid Director’s Guide to Trending Legal Issues**
*Celestin GH - Level 3*

This session will provide financial aid directors with an overview of key legal issues emerging from current Title IV enforcement activities, both in and out of the U.S. Department of Education and the Office of Inspector General. The session will go beyond top 10 lists of program review findings and focus primarily on trendsetting and high risk compliance issues arising out of recent program reviews, audits, investigations, federal court decisions, administrative hearings, and pending legislation and regulations. Led by an attorney with over 20 years of Title IV experience, this session will identify the issues and discuss the potential risks.

**Moderator:**
Marcia McConnell, Director, Scholarships and New Student Financial Aid, Berry College

**Speaker:**
Joel Rudnick, Principal, Powers, Pyles, Sutter & Verville, P.C.
Repayment Plans
Celestin D - Level 3
Income-driven repayment plans can provide critical relief for federal student loan borrowers who owe more in federal student loans than they earn in a year, and for those who work in public service. This session will provide an overview of the Department of Education’s income-driven repayment plans, including borrower eligibility criteria and loan forgiveness provisions. We will also explain the relationship between income-driven repayment plans and Public Service Loan Forgiveness. Finally, we will provide an overview of the negotiated rulemaking and proposed changes in the Revised Pay as You Earn (REPAYE) plan.

Moderator:
Aaron Steffens, Associate Director of Financial Aid, Luther College

Speakers:
Ian Foss, Program Specialist, U.S. Department of Education
Nathan Arnold, Office of Postsecondary Education, U.S. Department of Education

150% - A Life Cycle Overview
Celestin E - Level 3
This session presents an integrated systems life cycle overview of 150% processing. Three major Federal Student Aid (FSA) systems are used to implement Subsidized Usage Limit Applies (SULA) requirements – COD, NSLDS, and CPS. While each system has a unique role in receiving, evaluating, monitoring, storing, and reporting SULA data, all of the systems are linked and are mutually dependent. The session will focus on the beginning-to-end flow and use of SULA-related data, between schools, FSA systems, and FSA loan servicers.

Moderator:
Terry Finefrock, Senior Associate Director of Financial Aid, Baldwin Wallace University

Speakers:
Wood Mason, Business Operations & Program Services, U.S. Department of Education

State Authorizations
Strand 10AB - Level 2
This session will cover the state authorization requirements with which an institution must comply to be eligible for Title IV funding. Both policy and operational considerations will be addressed.

Moderator:
Sally Mickelson, Director of Financial Aid, Roseman University of Health Sciences Nevada Campus

Speakers:
Scott D Prince, Institutional Improvement Specialist, U.S. Department of Education
Sophia McArdle, Management/Program Analyst, U.S. Department of Education

FAFSA Simplification: Finding the Right Way
Strand 12AB - Level 2
The wave to simplify the FAFSA has grown to epic proportions, but done thoughtlessly, a FAFSA too simplified would not provide sufficient data for awarding the “right dollars to the right students” at the federal, state, and institutional levels. This spring, NASFAA’s FAFSA Working Group accepted the challenge of finding the middle ground in FAFSA simplification. This session will summarize their discussions and recommendations.

Moderator:
Justin Draeger, President and CEO, NASFAA

Speakers:
Justin Draeger, President and CEO, NASFAA
Karen McCarthy, Senior Policy Analyst, NASFAA

1:45pm - 4:00pm

NASFAA U - Cost of Attendance
Celestin A - Level 3
This session will introduce the concept of cost of attendance, describe each cost component used to develop student budgets, and present how financial aid administrators develop the cost of attendance for their institutions.

Moderator:
Amanda Sharp, Training Specialist, NASFAA

Speakers:
Amanda Sharp, Training Specialist, NASFAA
Debra LaGrone, Training Specialist, NASFAA
David Tolman, Training Specialist, NASFAA
Leading Up, Down and All Around
Celestin BC - Level 3
Financial aid personnel play an increasingly complex role in building relationships with colleagues across campus—from peers, to presidents and staff, to students. Data is the key to the stories that must be told. This workshop will take a look at how best to craft these relationships and keep your voice in the matters pertaining to financial aid. Three groups of contacts will be discussed: up (presidents and boards of trustees), down (staff and student management), and all around (media, agencies, entities outside the campus).

Speakers:
Anne Walker, Director of Financial Aid, Rice University
Angeles Fuentes, Director of Financial Aid Services, California State University, Monterey Bay
Cristi Millard, Director of Financial Aid, Salt Lake Community College
Barbara Miller, Director of Financial Aid, Stevenson University
Bryan Erslan, Director of Student Financial Assistance, Eastern Kentucky University
Marvin Smith, Director, Indiana University-Purdue University Indianapolis

Hiring, Training and Promoting the Emerging Leaders
Strand 11AB - Level 2
Are you prepared to pick the best person for your team? When it comes to hiring, training, developing and managing, do you have a plan? In our profession we are experiencing a transition of veteran aid administrators exiting this career and opening the door to new successors. Is your team ready for change? Hiring can be one of the most thought provoking, labor-intensive, second-guessing and important practices that you follow outside of federal regulations. Join our presenters as they share the tools that guide leaders in the right direction of hiring the best staff to complete the succession plan.

Moderator:
Shashanta S James, Associate Director of Financial Aid, Western Michigan University

Speakers:
Shashanta S James, Associate Director of Financial Aid, Western Michigan University
Pamela Fowler, Executive Director, Office of Financial Aid, University of Michigan

The State University of New York’s Approach to Student Retention
Strand 13AB - Level 2
This session will describe how the State University of New York (SUNY), the largest comprehensive university system in the United States, developed a campus-adaptable, student engagement retention model using integrated day-to-day NSLDS data and an in-house developed student email delivery platform. The system and campus presenters will discuss the step-by-step process for replicating this collaborative campus initiative; including the industry acknowledged research used to support the intrusive student outreach approach.

Moderator:
William J. Cavin, State University of New York Smart Track Program Coordinator, State University of New York System Administration

Speakers:
William J. Cavin, State University of New York Smart Track Program Coordinator, State University of New York System Administration
Patricia Thompson, Assistant Vice Chancellor Student Financial Aid, State University of New York System Administration
Jim Trimboli, Director of Financial Aid, Niagara County Community College

3:00pm - 4:00pm
Tune Up Your Compliance - Part Deux
Celestin GH - Level 3
This session was very popular at the last NASFAA Conference and is back for round deux! There are more Title IV requirements than can be easily counted. This session will review the vulnerabilities that have arisen out of recent regulatory changes and enforcement actions. We will specifically discuss distance education and non-traditional programs, satisfactory academic progress, verification, consumer information and policies and procedures. Tuning up these areas will help you prepare for the audit or program review spotlight.

Moderator:
Marjorie Arrington, Higher Education Services Senior Advisor, Cooley LLP

Speaker:
Rebecca Flake, Higher Education Services Senior Advisor, Cooley LLP
Legislative Update from the Graduate and Professional Perspective  
Strand 12AB - Level 2  
This session will feature a legislative update for administrators who work with graduate and professional students who receive federal aid. Topics will include relevant issues from recent and/or pending legislation, and regulation and policy, including Public Service Loan Forgiveness, income-driven repayment options, the future of the Perkins Loan Program, and more! Ample time will be given for questions and discussion.  
Moderator:  
Mary B. W. Fenton, Director, Student Financial Aid Services, The University of New Mexico Health Sciences Center  
Speaker:  
Megan McClean, Managing Director of Policy & Federal Relations, NASFAA

Advanced Techniques in Social Media  
Celestin F - Level 3  
Your school has a Facebook account and Twitter profile... now what? Social media is an effective way to talk to students about financial literacy and smart money management. It can also be used to help with recruitment and retention efforts. This course explores how to develop a strategy, increase engagement and grow your audience. It will provide timesaving best practices and tools that will increase the effectiveness of your social media program. Whether social media is new to your school or has been around for a while, you will leave with at least one action to use immediately.  
#BetterResults #LessTime  
Moderator:  
David Long, VP, Region Head - Sales, Sallie Mae  
Speakers:  
 Temeka Easter, Communications Media Analyst, Sallie Mae  
Philip Schuman, Director of Financial Literacy, Indiana University - University Student Services and Systems

Repayment Plans  
Celestin D - Level 3  
Income-driven repayment plans can provide critical relief for federal student loan borrowers who owe more in federal student loans than they earn in a year, and for those who work in public service. This session will provide an overview of Federal Student Aid's (FSA) income-driven repayment plans, including borrower eligibility criteria and loan forgiveness provisions. We will also explain the relationship between income-driven repayment plans and Public Service Loan Forgiveness.  
Moderator:  
Linda Good, Assistant Director/Client Services, Oklahoma State University  
Speakers:  
 Ian Foss, Program Specialist, U.S. Department of Education  
Nathan Arnold, Office of Postsecondary Education, U.S. Department of Education

Federal Town Hall  
Celestin E - Level 3  
Presenters from the U.S. Department of Education will take questions from the audience on any number of different topics covered at the conference.  
Moderator:  
Craig Slaughter, Director of Financial Aid, DePauw University  
Speakers:  
Jeff Baker, Federal Student Aid, U.S. Department of Education  
Lynn Mahaffie, Senior Director, Policy Coordination, Development and Accreditation, U.S. Department of Education  
Carney McCullough, Director, Policy Development Group, U.S. Department of Education  
Karen McCarthy, Senior Policy Analyst, NASFAA  
Dan Mann, 2015-16 NASFAA National Chair and Director of Financial Aid, University of Illinois at Urbana-Champaign  
Eileen O’Leary, 2014-15 NASFAA National Chair and Assistant Vice President Student Financial Services, Stonehill College

Program Review Essentials & Top 10 Compliance Findings  
Strand 10AB - Level 2  
This session will focus on the program review process and the common compliance findings. We will conduct a walk-through of the program review process, highlighting the areas with the current “Top 10 Program Review and Audit Findings.” Learn what you can do to improve your school’s program administration and to remain in compliance with Title IV regulations and statutes, and what to expect when it is time for a program review at your school.  
Moderator:  
Shane Davidson, Vice President for Enrollment, University of Evansville  
Speaker:  
Scott D Prince, Institutional Improvement Specialist, U.S. Department of Education

P Peer-to-Peer Session  
H Half-Day Workshop  
P Financial Aid Business Solution Seminar
4:15pm - 5:15pm

**Title IV, Veterans & Military Benefits Administration at a Crossroads**

**Celestin GH - Level 3**

Institutions that participate in student financial assistance programs governed by the U.S. Department of Education (Title IV), the Department of Veterans’ Affairs (GI Bill) and Department of Defense (Tuition Assistance Program) are often overwhelmed regarding the various standards of each agency. This session will feature a panel discussion focusing on the key similarities and differences of compliance with each agency including topics such as attendance, refunds or returns, satisfactory academic progress, punitive and nonpunitive grades, policy and procedure expectations, and common deficiencies in program reviews and compliance surveys.

*Moderator:*
Matthew Johnson, Attorney, Cooley LLP

*Speakers:*
Marjorie Arrington, Higher Education Services Senior Advisor, Cooley LLP
Megan Burda, VA Coordinator, DePaul University
Andrea M Wheeler, Financial Aid Veterans Coordinator, Waubonsee Community College

**Happy Staff, Happy Life**

**Strand 11AB - Level 2**

This session will explore successful ways in which directors and those with supervisory roles can influence all the change, things and people for which we are responsible. We will look beyond regulation and examine the impact change has on the people and processes of an effective aid office. We’ll look at ways of helping others do a better job for the students they serve. We’ll discuss the procedures for repurposing staff by assessing strength rather than strife. Sometimes it takes something so simple to make your office a happy place to work.

*Speaker:*
Barbara Miller, Director of Financial Aid, Stevenson University

**Responsible Borrowing Initiatives**

**Strand 13AB - Level 2**

In just one year with one policy change, Western Governors University significantly changed student loan borrower behavior. Learn more about the policy and process changes necessary to potentially have the same impact on your campus by participating in the Experimental Sites Initiative, limiting unsubsidized loan, and adopting a hybrid version of the federal Shopping Sheet.

*Moderator:*
Robert Collins, Vice President of Financial Aid, Western Governors University

*Speakers:*
Janie Leddy, Associate Director of Financial Aid, Western Governors University
Devan Aschenbrener, Associate Director, Western Governors University
Amy Kearns, Vice President of Client Services, CampusLogic

**Graduate/Professional Orientation Changing Practices**

**Strand 12AB - Level 2**

With the rise of online graduate programs and the desire of schools to streamline orientation, many financial aid administrators have found their role in orientation changing. Are more schools moving toward a ‘pre-orientation’ format? Are online webinars and chats playing a new or bigger role in orientation? This session will provide an overview of formats that graduate/professional aid administrators are using as part of (or in place of) orientation.

*Moderator:*
Julia Jenkins, Senior Assistant Director of Financial Aid, Northwestern University Chicago Campus

*Speakers:*
Paul Dodds, Assistant Director, Northwestern University
John Garcia, Director, Michigan State University College of Law
Peter Goss, Director of Financial Aid, University of Western States
Reviewing the Results of the Loan Servicing Issues Task Force
Celestin F - Level 3
High quality federal loan servicing is critical to the success of borrowers. Managing the transition from one federal loan servicer to multiple servicers and working to eliminate split borrowers was a daunting challenge for Federal Student Aid (FSA). During this transition, reports of inconsistencies, confusion, and questions about appropriate contract incentives permeated the school community. Recognizing these issues, the National Direct Student Loan Coalition and NASFAA formed a joint task force to examine federal student loan servicing and make recommendations for improving the borrower experience. Members of the task force will discuss their review and their recommendations to improve federal loan servicing.

Moderator:
Tami Sato, Sr. Director of Enrollment Management and Financial Aid, Marshall B. Ketchum University

Speakers:
Elena Olivier, Default Prevention Coordinator, San Jacinto College
Margaret H. Rodriguez, Senior Associate Director, University of Michigan
Rohit Chopra, Assistant Director & Student Loan Ombudsman, Consumer Financial Protection Bureau
Charlotte Etier, Research Analyst, NASFAA

NSLDS Update
Celestin E - Level 3
This session will recap the changes made in 2015 to the National Student Loan Data System’s (NSLDS) websites, reports for schools, and enrollment reporting changes. Attendees will also hear about NSLDS changes planned for 2016.

Moderator:
Amy Cable, Director, Financial Aid, Baton Rouge Community College

Speaker:

Inside the Beltway: NASFAA Federal Update
Strand 10AB - Level 2
Capitol Hill has been buzzing with interest on financial aid issues. Join NASFAA President Justin Draeger and Managing Director of Policy & Federal Relations Megan McClean as they provide a high level update of what’s happening in Washington, D.C. and the work of NASFAA’s various policy task forces.

Speakers:
Justin Draeger, President and CEO, NASFAA
Megan McClean, Managing Director of Policy & Federal Relations, NASFAA

Verification for 2016-17
Celestin D - Level 3
This session will discuss verification requirements for 2016-17, including FAFSA data subject to verification, changes to verification tracking groups, and acceptable documentation.

Moderator:
Virginia Tucker, Associate Director, Financial Aid, New Mexico State University

Speaker:
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
get social in the big easy!

While in New Orleans, be sure to log on and communicate with your peers through NASFAA’s social media channels.

Twitter: Post your insights, images, and questions about sessions, speakers, and events to Twitter using hashtag #NASFAA2015. A streaming list of members’ tweets from Twitter.com/NASFAA will be shown in real-time on a flat screen near the information desk, courtesy of SoFi.

Facebook: Make sure to “like” us at Facebook.com/NASFAA. Then you can check out the “2015 NASFAA National Conference New Orleans” photo album and email your best conference photos to news@nasfaa.org for inclusion. If you’re posting pictures from the conference on your own Facebook page, be sure to tag NASFAA in the pictures for the chance to have them appear on NASFAA’s page.

If you’re not already one of the 6,000+ members of NASFAA’s LinkedIn group, be sure to join us at LinkedIn.com/groups?gid=3641400 to connect with other attendees — and see what your colleagues are talking about!
### Introduction

On Tuesday, July 1, 2014, 2013-14 National Chair Craig Munier opened the 2014 NASFAA Business Meeting and introduced the head table. He asked for a moment of silence to honor those financial aid colleagues who have passed away in the last year. He next thanked and recognized a series of groups, including conference exhibitors and sponsors, the Conference and Local Arrangement Committees, presenters and moderators, retirees and past presidents, NASFAA’s Board, the NASFAA staff, and all who have earned a NASFAA University credential.

Munier then called for a motion to approve the minutes of the 2013 Annual Business Meeting. The motion was approved unanimously by voice vote. No new business was brought before the body.

### Awards

Chair Munier then presented the following awards:

- **Regional Leadership Awards**, for individuals exhibiting high integrity and character, creative leadership, and a commitment to professional development:
  - EASFAA – Rich Heath, Director of Student Financial Services at Anne Arundel Community College in Maryland
  - MASFAA – Diane Lambart-Fleming, Associate Director from Central Michigan University (retired)
  - RMASFAA – Brenda Hicks, Director of Financial Aid at Southwestern College in Kansas
  - SASFAA – Sandra Neel, Executive Director of Financial Aid at the University of Louisville
  - SWASFAA – Liza Blazer, Associate Vice President for Financial Aid and Enrollment Services at University of Texas at San Antonio
  - WASFAA – Kay Soltes, Director of Financial Aid at Pacific Lutheran University in Washington

- **Gold Star Awards**:
  - #FAchat, a moderated Twitter chat for financial aid professionals
  - The University of Denver for Financial Aid 101 – An Email Series

- **Robert P. Huff Golden Quill Award**: Dr. Will Doyle, Vanderbilt University

- **Allan W. Purdy Distinguished Service Award**:
  - Sen. Lamar Alexander (R-TN)
  - Rep. George Miller (D-CA)
  - Dr. Martha Kanter, former Undersecretary of Education
  - Dr. David Mohning, retired as Executive Director of Financial Aid and Assistant Professor at Vanderbilt University

- **Lifetime Membership Award**: Karen Fooks, retired as Director of Student Financial Affairs from University of Florida

### Treasurer’s Report

NASFAA 2013-14 Treasurer Dan Mann reported on NASFAA’s financial standing:

- NASFAA is projecting a June 30 fiscal year-end surplus of approximately $600,000—the result of larger-than-expected revenues in membership, training, and a successful 2013 conference in Las Vegas as well as additional cost-cutting measures made by staff.
- The Dallas Martin Fund for Education, which was established to support research and best practices in public policy and student aid, currently has a balance of $310,000. This year, $9,229 has been disbursed from this fund to support NASFAA’s policy internship program. This year, the DME is supporting Blondeen Philemond, 2014 policy intern.
- Membership dues continue to be at or below the levels of comparable professional associations. Over the last four years, NASFAA has continued to diversify its revenue streams. For example, in 2010, NASFAA membership dues represented 70 percent of revenue. At the June 30 fiscal year-end, membership revenue is projected to represent 58 percent of revenue. Multi-year fiscal goals such as these help ensure greater financial stability in the future.
- The Board of Directors recently approved a 2014-15 NASFAA operating budget totaling just over $7.3 million. NASFAA’s reserves are fully funded to the designated amounts as outlined in the Board of Director’s Policy and Procedure Manual.
- NASFAA received a clean independent audit from the McGladrey Pullen accounting firm. For the third year in a row the audit was concluded without any findings, management letter, or recommendations.
AGC Chair’s Report
2013-14 Association Governance Committee Chair Ron Day reported that:
• We have 2,268 individuals attending the 2014 national conference
• This year’s retention rate continues to outpace many other associations; 2,839 institutional members serving over 90 percent of all students who receive federal financial assistance in the United States.

Outgoing Chair’s Remarks
Chair Munier then gave a closing address to the membership: “Thank you to the NASFAA Board members, observers, committee and task force chairs, and members. You are devoted professionals who gave of yourselves unselfishly. NASFAA is what it is because of you and the passion you share for our profession.”

“What you do is so much bigger than financial aid,” Munier told the crowd. “This isn’t what we do; this is who we are. Thank you for allowing me to represent you and this great profession, which I love.”

Chair Munier then passed the gavel to 2014-15 National Chair Eileen O’Leary, who bestowed upon Munier the Allan W. Purdy Distinguished Service Award. “There is no one I would rather pass this gavel to than you,” Munier told O’Leary. O’Leary asked for any new business and, hearing none, moved to adjourn the 2014 Business Meeting.

Respectfully submitted,

Elizabeth G. Maglione
Board Secretary, NASFAA

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2016 NASFAA NATIONAL CONFERENCE JULY 10-13, WASHINGTON, DC MARRIOTT WARDMAN PARK
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Phone: 7814711601
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CMD Outsourcing Solutions improves customer relations for Higher Education by more effectively connecting students and parents with their school. We partner with colleges and universities to provide a seamless and cost-effective communications platform to better handle issues related to administrative services, including admissions, registration, financial aid, business office and housing. Wherever you face resource challenges in serving your students, CMD can help.

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Phone: 801-321-7114
Email: briding@utahsbr.edu
CornerStone Education Loan Services is a nonprofit Department of Education Servicer. We have over 35 years of experience in high-quality customer service in student loans and are happy to continue that tradition by providing service to student loan borrowers throughout the country. Our mission is to provide conscientious service to our borrowers to assist them in the successful repayment of their student loan obligations. We are also committed to our school partners by providing them information and other services to help them better serve their students. Please visit www.mycornerstoneloan.org for more information.

Discover Student Loans ........................................ Sponsor Only
2500 Lake Cook Road
Riverwood, IL
Email: bradymasterson@discover.com
DiscoverStudentLoans.com
We believe in responsible borrowing and encourage students to maximize grants, scholarships and other free financial aid before taking student loans. Discover Student Loans covers up to 100% of the cost of attendance minus financial aid for college and graduate school. We also have post-graduate loans for students studying for the bar exam or entering a residency. All loans feature fixed or variable interest rates, zero fees, choice of in-school or deferred repayment, and cash rewards for good grades. U.S.-based Student Loan Specialists are ready to help students 24/7, and Priority Services provides personal support for financial aid offices.

EDMOUTH ......................................................... Sponsor Only
(Edward S. Ed说服)(educational funding of the south, inc.)
501 Corporate Centre Drive, Suite 320
Franklin, TN
Email: rgambill@edfinancial.com
Edsouth is a non-profit, public benefit corporation organized for the purpose of acquiring postsecondary education loans. Our mission is to expand access to higher education by providing college and career planning information, career testing, and financial literacy for students and families. Since 1988, Edsouth has provided postsecondary education support to thousands of postsecondary students.

Education Partners ............................................. Sponsor Only
9442 Capital of Texas Hwy North, Plaza One, Ste 500
Austin, TX
Phone: 888-782-4868
Email: melissa.creaney@educationpartners.com
www.educationpartners.com
Education Partners, a Student Relationship Management Company, is a SaaS based education technology company which has designed a rules-based engine that marginalizes compliance risk and features document management, configurable workflows, dynamic forms, electronic signatures, and process dashboards around key business functions. Presently, our enrollment solution addresses admissions and financial aid, the top compliance and process-intensive areas. By the end of 2015, the company plans to offer three additional suites -- student inquiry management, student engagement (retention), and student community (career services, alumni, and employment) functions -- to complete its system.
Edvisors Network .......................................................... 312
10000 W. Charleston Blvd., Suite 200
Las Vegas, NV
Email: amyles@edvisors.com
Edvisors.com is a trusted source of information and insights for millions of students and families looking to plan and pay for college. Our expertise helps students and parents easily find what they need to know, so they can make more informed, smarter decisions about college costs and financial aid. Our team includes the leading national experts in the industry: Mark Kantrowitz and David Levy, bestselling authors of Filing the FAFSA.

ELM Resources .............................................................. 313
12950 Race Track Road, Suite 201
Tampa, FL
Phone: (866) 524-8198
Email: jrehder@elmresources.com
www.elmresources.com
ELM Resources began in 1994 and is the only not-for-profit mutual benefit corporation serving the student loan industry today, including universities, colleges and lenders. ELM provides a common, non-proprietary and open data exchange and disbursement system that seamlessly links the diverse computing platforms of schools and lenders. Over 1,600 campuses use ELM Resources to send and receive loan data for private loans with the lender of their choice. For more information visit www.elmresources.com or dial (866) 524-8198.

Fastweb ........................................................................ 511
444 N. Michigan Avenue, Suite 600
Chicago, IL
Phone: 310-893-5549
Email: jacy.shillan@monster.com
www.fastweb.com
Fastweb is the nation’s recognized leader in helping students pay for college. We are in our 20th year of supporting students’ efforts to fund their education with a scholarship database containing over 1.5 million scholarships, smart college search functionality, and student centered financial aid information. Our program for educators provides support with free online and free printed materials. Educators can request printed materials for their offices and for their student and parent events. We are a community of students, parents, scholarship providers and over 60,000 educators. Please visit Fastweb for Educators at www.fastweb.com/educators.

Financial Aid Services ................................................... 207
180 Interstate North Parkway, Suite 550
Atlanta, GA
Email: nverrett@financialaidservices.org
Financial Aid Services (FAS) has been serving higher education for over 24 years. Located in Atlanta, we provide consulting, staffing, assessments, processing and customized services to assist colleges in improving operational efficiency, student satisfaction, and regulatory compliance in the financial aid office. FAS employs 75 staff with an average 26 years experience in the financial aid profession. We have successfully completed over 1,000 engagements nationwide. Our consultants bring unparalleled expertise in the management of financial aid. For more information, you may contact our Client Relations Team at 770-988-9447 or Info@FinancialAidServices.Org. Our website address is www.FinancialAidServices.Org.

Financial Aid TV ............................................................ 202
P.O. Box 7139
Boulder, CO
Email: damon@financialaidtv.com
Financial Aid TV (FATV) is a customizable online video resource that enables colleges and universities to answer student questions and educate students about Satisfactory Academic Progress (SAP) policies. FATV educates students while supporting staff. The result: reduced student wait times, improved customer service, and greater student understanding.

First Marblehead Corporation ................................. 103
One Cabot Road
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Phone: 617-638-2000
Email: mhager@fmd.com
www.firstmarblehead.com
First Marblehead is a leading provider of private student loan solutions for lenders, credit unions and schools. We help meet the growing demand for education financing by offering clients a complete and integrated suite of outsourced services for private student loans, including underwriting, loan origination and portfolio risk management.

FluidReview ................................................................. 600
12 York Street, 2nd Floor
Ottawa, ON 94301
Canada
Phone: 6136177806
fluidreview.com
FluidReview provides comprehensive scholarship management solutions for academic institutions of all shapes and sizes.

FluidReview has helped hundreds of universities and colleges manage all of their scholarships under one centralized, easy-to-use and secure system. Proven in higher education, highly configurable, fully integrated, quick to implement and backed by outstanding service and support, FluidReview helps financial aid offices more effectively utilize their scholarship funds, improve service to students and empower stewardship.
FolderWave ..................................................................................601
238 Littleton Road
Westford, MA
Phone: 978.392.2055
Email: pkelleher@folderwave.com
www.folderwave.com
FolderWave is a cloud-based company offering tools and services to colleges and universities designed to significantly improve complex, high-volume, time-dependent process and data management operations in many areas across the enrollment management spectrum including inquiry and application processing, undergraduate and graduate admissions, financial aid processing, transcripts, academic, and alumni records, contract and grant administration, and integrated CRM solutions. FolderWave’s clients represent some of the finest and most complex higher education institutions in the country, and they share in common the desire to adapt, learn and respond to market changes in new and sophisticated ways.

Good Call ..................................................................................412
1101 Red Ventures Drive
Ft Mill, SC
Email: carrie@goodcall.com
www.goodcall.com
GoodCall simplifies the scholarship search process for high school, undergraduate, and graduate students by providing access to a comprehensive private scholarship database with advanced filtering options. GoodCall uniquely enables students to focus on scholarships they have a greater likelihood of winning by estimating the expected competition level and entry difficulty of each award. The database is updated daily and requires no personal information from students to access the entire set of scholarships.

Great Lakes Higher Education Corporation & Affiliates....506
2401 International Lane
Madison, WI
Email: bbfeller@glhec.org
schools.mygreatlakes.org
At Great Lakes, we believe college completion has the power to transform lives. That’s why our mission is supporting students, and those who work with them, to make higher education accessible, the student loan process simpler, and the possibility of completing and paying for college real. Using our experience, we develop resources that help you positively impact your students through prioritized, easy actions, all backed by dedicated representatives, expert support and training, and the same mission-driven vision that drives Great Lakes’ philanthropic reinvestment in student success. Learn more! Visit our booth, contact your Great Lakes representative, or visit our website.

iGrad..........................................................................................708
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Cardiff By The Sea, CA
Email: RLabreche@igrad.com
www.igrad.com
iGrad is privileged to partner with more than 600 schools nationwide to provide a financial literacy platform which connects more than 1.2 million students, as well as alumni and staff. iGrad is the only organization to offer a customizable, adaptive learning financial education platform with optional video-based student loan entrance and exit counseling. iGrad also offers a classroom curriculum to satisfy all core competencies set by the Department of Treasury.

iontuition/i3Group .....................................................................700
1701 Golf Road, Suite 2-150
Rolling Meadows, IL
Phone: (888) 853-8148
Email: sgrewal@iontuition.com
www.iontuition.com
iontuition provides your students and alumni with a single portal to assess their continuing education options, build financial literacy, and set borrowing and repayment strategies. From entrance counseling to personalized one-on-one counseling from student loan experts, an iontuition account gives your students every chance to succeed from enrollment to long after they’ve left campus. Learn more at iontuition.com. i3 Group sets the standard for excellence in federal student loan default aversion. Our team puts a wealth of college, servicer, guaranty agency, and Department of Education experience at each school’s disposal alongside proven solutions that reduce delinquency and prevent default.

Inceptia.........................................................................................406
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Phone: 888-529-2028
Email: saraw@inceptia.org
www.inceptia.org
Inceptia, a division of National Student Loan Program (NSLP), is a nonprofit organization providing premier expertise in higher education access, student loan repayment, analytics, default prevention and financial education. Our mission is to support schools as they arm students with the knowledge needed to become financially responsible adults. Since 1986, we have helped more than two million students achieve their higher education dreams at 5,500 schools nationwide. Annually, Inceptia helps more than 156,000 students borrow wisely, resolve their delinquency issues and successfully repay their student loan obligations. More information at Inceptia.org.
Jenzabar, Inc.  
1401 Technology Drive  
Harrisonburg, VA  
Email: carina.ganisa@jenzabar.com

Jenzabar is a leading provider of software, strategies, and services developed exclusively for higher education. Our integrated, innovative solutions advance the goals of academic and administrative offices across the campus and throughout the student lifecycle. Jenzabar’s family of award-winning products includes the industry’s next-generation financial aid solution. Jenzabar Financial Aid provides the automation, packaging, and reporting institutions need to remain compliant and competitive, and ultimately freeing up time to focus on their students. As a trusted partner on more than 1,000 campuses worldwide, Jenzabar has over four decades of experience supporting the higher education community.

Kentucky Higher Education Assistance  
Authority (KHEAA)  
HP.O. Box 798  
100 Airport Road  
Frankfort, KY  
Phone: 502-696-7283  
Email: tfranzeim@kheaa.com  
www.kheaa.com

The Kentucky Higher Education Assistance Authority (KHEAA) is a guarantor and administrator of student aid and a provider of: Cohort Default Management Services, KHEAA Verification Services, Advantage Education Loan and Advantage Parent Loan. KHEAA’s specially trained staff work with students, school personnel and administrators to ensure your needs are met. Stop by our booth to see how KHEAA can help you!

LendKey Technologies, powering cuStudentLoans  
104 W. 27th Street, 4th Floor  
New York, NY  
Phone: 8008818985  
Email: michelle.bowman@lendkey.com  
www.lendkey.com/studentloans

LendKey powers comprehensive private student loan programs complete with underwriting, origination, servicing, marketing and financial literacy solutions for lenders across the nation, including cuStudentLoans.

Mapping Your Future, Inc.  
PO Box 2578  
Sugar Land, TX  
Phone: 940-497-0741  
Email: cathy@mappingyourfuture.org  
mappingyourfuture.org

Since 1996, Mapping Your Future has been a leading provider of student loan and financial aid counseling and information resources for students, parents and schools. As a non-profit organization, we continue to provide trusted, unbiased and cost-effective tools for financial aid professionals to better serve students -- past, present and future.

NASFAA  
1101 Connecticut Avenue, NW, Suite 1100  
Washington, DC  
Phone: (202) 785-0453  
Email: jacksonj@nasfaa.org  
www.nasfaa.org

The National Association of Student Financial Aid Administrators (NASFAA) supports the training, diversity, and professional development of financial aid administrators; advocates for public policies and programs that increase student access to and success in postsecondary education; and serves as a forum for communication and collaboration on student financial aid issues.

National Student Clearinghouse  
2300 Dulles Station Boulevard, Suite 300  
Herndon, VA  
Email: cattie@studentclearinghouse.org  
www.studentclearinghouse.org

The trusted source of academic and financial aid data. From enrollment verification, degree verification, student loan data retrieval to research. The National Student Clearinghouse serves students, schools and federal and state agencies needing student data.

Navient  
123 Justison Street  
Wilmington, DE  
Phone: 888-272-4665  
Email: karen.vanmeter@navient.com  
www.navient.com

Navient is the largest education loan servicer managing FFELP, ED and Private loan portfolios. We service seven of the top 10 student loan guarantors, and we are the top-performing collector on hundreds of contracts for government agencies. Navient offers a variety of loan management, servicing and asset recovery services to clients in higher education, federal, state and local government and is one of a select group of companies chosen to service student and parent federal loans for the U.S. Department of Education. Our federal loan customers default at a rate 40 percent better than those of our competitors.

Nelnet  
121 So. 13th Street, Suite #400  
Lincoln, NE  
Email: kristi.jones@nelnet.org  
www.nelnet.com

Nelnet Education Loan Servicing has provided excellent student loan servicing for more than 30 years. As a dedicated school partner, we offer you and your students easy, online access to loan information, default management tools and reporting, financial literacy resources, and industry-related training. We are committed to providing first-class customer service to you and your students, and we strive to be a superior servicing resource by providing schools with clear, consistent communication and accessibility. Stop by our booth to learn more about our new initiatives and gain helpful information.
NerdScholar ................................................................. 515
San Francisco, CA
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www.nerdscholar.com

NerdScholar is a financial literacy website for students that empowers them to make smart financial choices. Our free website walks students through the process of choosing a best-fit college, applying for financial aid, taking out student loans, paying back those loans, and landing a job. Our NerdScholar FAFSA Guide, funded by a grant from the Bill and Melinda Gates Foundation, provides students with a step-by-step tutorial to use while applying for federal financial aid.

Noel-Levitz, Inc. ............................................................ 213
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Coralville, IA
Email: Kylie-Bowen@noellevitz.com

Our experienced team works with campuses across the country to integrate student recruitment and retention, market research, and financial aid into a comprehensive approach to enrollment and net revenue management. We offer price sensitivity research, strategic financial aid consulting, and a highly customizable net price calculator. Visit www.noellevitz.com or blog.noellevitz.com.

NorthStar Education Services, Inc................................. 510
930 Blue Gentian Road, Suite 1000
Eagan, MN
Phone: 866-315-9113
Email: carrie.hansen@nseds.com
nseds.com

NorthStar Education Services is a well-respected and experienced organization that has served student loan borrowers and their schools for almost 25 years. We provide a comprehensive and proven-effective approach to helping student loan borrowers manage their education debt and avoid default. By combining proactive financial literacy with responsive delinquent outreach, school becomes more affordable, money management doesn’t get postponed, and student loan repayment is easily tackled. Everyone needs a helping hand once in a while. We’re experts in the field, bringing decades-long, hands-on student loan management experience to students—from the schools who love them.

Pennsylvania Higher Education Assistance Agency (PHEAA) ................................................................. 710
1200 North 7th Street
Harrisburg, PA
Phone: 7177203546
Email: dbrown1@pheaa.org

FedLoan Servicing was established by the Pennsylvania Higher Education Assistance Agency (PHEAA) to support the U.S. Department of Education’s ability to service student loans owned by the federal government. PHEAA conducts its student loan servicing activities nationally as FedLoan Servicing and American Education Services (AES).

PNC Bank Education Loan Center................................. 200
2600 Liberty Avenue, Suite 200
Pittsburgh, PA
Email: jason.vansickle@pnc.com

PNC Bank offers both fixed and variable rate loans to help families achieve their educational goals. PNC has been in the education business for over 45 years helping families with education related expenses. For your students and their families, we are proud to employ a highly trained customer service staff at our Pittsburgh, Pennsylvania call center, whose only responsibility is serving education loan customers. We also have dedicated Campus Relationship Managers to assist schools every step of the way.

Regent Education ......................................................... 201
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Frederick, MD
Phone: 301-662-5592
Email: lesley.phelps@regenteducation.com
www.regenteducation.com

Regent Education is a leading provider of software solutions that have revolutionized financial aid management and enrollment processes for schools using non-traditional enrollment models such as competency based and self-paced learning. Regent is a nationally recognized leader in results-driven enrollment optimization and financial aid management solutions - solutions that are web-based, easy-to-use, and inter-operate with any existing student information system. Regent offers cloud-based tools that help institutions increase enrollment, improve retention, speed student processing, mitigate compliance risks and deliver bottom-line results.

Sallie Mae ..................................................................... 407
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www.salliemae.com

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Selective Service System ...............................................614
P.O. Box 94636
Palatine, IL
Phone: 888-655-1825
Email: matthew.tittmann@sss.gov
www.sss.gov
The Selective Service System registers men between the ages 18-25 as is required by law. When a man reaches 26 years of age it is too late to register. Failure to register generally results in a loss of access to: • College loans and grants, • Job training programs, • Federal jobs, and many state and municipal jobs • U.S. citizenship for immigrants. The Agency provides literature, posters, internet and web site information to High Schools, Colleges, administrators, counselors, teachers, and community influencers to help educate young men about this civic-duty requirement.

Sigma Systems, Inc. ......................................................314
2305 S. Colorado Blvd., Suite 100
Denver, CO
Phone: 1-800-747-4462
Email: aortiz@sigmasys.com
www.sigmasys.com
Sigma’s Financial Aid and Student Accounts software is the most comprehensive student financial services solution available today. After 50 years, Sigma supports highly-automated solutions at many of the nation’s top post-secondary educational institutions. We start with annual and term-based support for loans, state grants, R2T4 calculations, COD, BBAY and automated PLUS loan processing. ProSAM continues with a highly-customizable, rules-based system deployable to many server and database platforms and tied into student self-service portals, information systems and enterprise applications. Our staff ties in years of student budgeting and awards packaging experience to navigate the ever-changing complexity of federal and state programs.

SoFi ...............................................................................410
One Letterman Drive, Building A, Suite 4700
San Francisco, CA
Phone: (855) 456-7634
Email: rsuryan@sofi.org
www.sofi.com
SoFi is reinventing consumer finance for the better. We’re a leader in marketplace lending, with over $2 billion in loans issued to date. We help early stage professionals accelerate their success with student loan refinancing, mortgages, mortgage refinancing and personal loans. Our nontraditional underwriting approach takes into account merit and employment history among other factors, so we offer products that can’t be found elsewhere. We offer individual and institutional investors the ability to create positive social impact on the communities they care about while earning compelling rates of return.

TG HigherEDGE Default Management Solutions ..........507
P.O. Box 83100
Round Rock, TX
Email: judith.cunningham@tgslc.org
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The College Board ........................................................605
250 Vesey Street
New York, NY
Email: acody@collegeboard.org
www.collegeboard.org
The College Board’s mission is to connect students to college success and opportunity. We are a not-for-profit membership organization committed to excellence and equity in education. Among our best-known products are the SAT, PSAT/NMSQT, and the Advanced Placement Program. For further information, visit www.collegeboard.org.

The Higher Education Assistance Group, Inc. ...............514
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Wellesley, MA
Phone: (617) 928-1975
Email: cking@heag.us
www.heag.us
Higher Education Assistance Group, Inc. (HEAG) is a financial aid and higher education consulting group. Since 1989, HEAG has provided comprehensive financial aid and higher education consulting support to private, public and proprietary institutions. Key services are: Title IV Compliance/Quality Assurance, Staffing, Technology, Processing and Remote Verification Services. HEAG. Compliance Experts When You Need Them.
Third Coast Higher Education ........................................... 728
1801 W Belle Plaine Ave, Suite 101
Chicago, IL
Phone: (312) 513-8348
Email: jeannelocarnini@outlook.com
www.thirdcoasthighereducation.org

Third Coast Higher Education -- your financial aid consulting partner. Our key services include audit and federal program review support; federal and state compliance assessment; student information system integration, automation and improved utilization of existing systems (PeopleSoft, Banner, PowerFAIDS, Colleague and more); business process and staffing assessment; and staff training and interim staffing solutions. With over 35 years of financial aid experience and support to an expanding number of colleges and universities, Third Coast Higher Education has the direct financial aid experience, federal compliance knowledge and system expertise to assist your institution.

Thrivent Federal Credit Union ........................................... 216
122 East College Avenue, Suite 1E
Appleton, WI
Phone: 866-226-5225
Email: jadams@cology.com
www.thriventcu.com

As one of the largest faith-based credit unions in the United States, Thrivent Federal Credit Union offers a unique combination of financial expertise, shared values with its members and competitive products including: private student loans, checking and savings accounts, mortgages and other consumer loans. With approximately $500 million in assets, Thrivent Federal Credit Union is well positioned to help guide, support and inspire members to achieve financial well-being. Becoming a member is easy and allows you access to all of our programs and services nationwide.

Tuition Management Systems ........................................... 308
171 Service Avenue, 2nd Floor
Warwick, RI
Email: jtrauman@afford.com

Tuition Management Systems is dedicated to helping families afford education and schools prosper. We help over 700 member schools nationwide ensure a quality experience and financial fit for students, coupled with a fully integrated payment solution. TMS also delivers resources and expertise needed to generate cost savings and workload reduction. We are ready to help students make informed decisions with our unbiased BorrowSmart Affordability Planning and Counseling, comprehensive billing, tailored payment options, payment processing, payment acceptance, Merchant Services, 1098 T processing and refund disbursements.

U-fi Student Loans .......................................................... 214
Phone: 844.318.0160
Email: kristin.tobias@nelnet.net
U-fi.com/StudentLoans

U-fi Student Loans is a new private educational loan program that provides loan options for students, as well as a refinance loan for borrowers who wish to consolidate their student loans. U-fi Student Loans is a partnership between Nelnet, a trusted name in education services for more than 35 years, and Union Bank & Trust, a lender with nearly a century of financial stability. Our mission is to help students reach their educational goals and make smart financial decisions by providing simple, helpful student loan solutions that offer competitive benefits, exceptional customer service and financial wellness resources. Please visit U-fi.com/StudentLoans.

U.S. Department of Education ........................................... 714
830 First Street NE
Washington, DC

The Department of Education’s mission is to promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

University Business .......................................................... 512
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USA Funds ................................................................. 101
9998 Crosspoint Boulevard, Suite 400
Indianapolis, IN
Email: mary lou.hoffa@usafunds.org

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Utah Higher Education Assistance Authority ...............209
P.O. Box 145112
Salt Lake City, UT
Email: baguayo@utahsbr.edu

Repay Centsibly is the simple and affordable way to keep your cohort default rate low. We provide School Default Prevention Services with Guaranteed Results.

Vocado, LLC...........................................................724
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Manhattan Beach, CA
Phone: (916) 436-8103
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As financial aid rules and regulations become increasingly complex, existing systems do not address today’s requirement for accuracy, consistency and timeliness. Vocado is changing the paradigm for financial aid management by offering the highest level of automation of any solution on the market today. Our solution improves a school’s level of financial aid automation, yielding consistency of results, an improved student experience, unparalleled USDE compliance, and dramatically reduced financial aid processing effort and time.

Wells Fargo Education Financial Services ......................107
301 East 58th Street North
Sioux Falls, SD
Phone: 877-451-5039
Email: joan.m.mcilvenna@wellsfargo.com
www.wellsfargo.com/collegeready

Wells Fargo Education Financial Services (EFS) has been in the student lending business since 1968 and serves more than 1.2 million student, parent and family customers. We provide private student loans directly to consumers, online, at more than 6,000 Wells Fargo banking stores, and through our call centers. In addition, we provide customers with tools to help them succeed financially while in school and prepare them for when they finish college. Through the Wells Fargo Foundation, we partner with nonprofit organizations and stakeholders to provide high quality assistance to those individuals who are working to achieve their educational dreams.
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www.borrowerconnect.org
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