CELEBRATING A HALF CENTURY OF OPENING DOORS TO HIGHER EDUCATION

2016 NASFAA NATIONAL CONFERENCE

JULY 10-13, WASHINGTON, DC
MARRIOTT WARDMAN PARK

A HALF CENTURY OPENING DOORS TO EDUCATIONAL OPPORTUNITY

CONERENCE PROGRAM

NASFAA
NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
HELP FAMILIES GET THE MONEY THEY NEED FOR COLLEGE

Visit Sallie Mae at Booth #203

Come by and test out your student loan smarts with some trivia fun. You’ll learn more about a new way to help families pay for college—the Sallie Mae Parent Loan℠—and we’ll be giving out sweet prizes.

SallieMae.com

TRIVIA TEASER!

Who’s eligible to take out a Sallie Mae Parent Loan on behalf of a student?

A. Parents or legal guardians only   C. Any adult
B. Family members                  D. Parents only

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Relax.

With financial aid solutions that free your mind—and your time.

Verification  |  Default Prevention  |  Financial Education

Financial aid is complicated. We’re not. At Inceptia, we support schools with powerfully effective and uncomplicated financial aid solutions that remove obstacles and give you more time with students.

Visit Booth #225 to find out how Inceptia can free your office from financial aid stress.
College and graduate students

Get Rewarded for hard work

Students earn a cash reward when they get a 3.0 GPA or equivalent. They can cover up to 100% of school-certified costs with zero fees.

DiscoverStudentLoans.com 1-800-STUDENT (788-3368)

Reward redemption period is limited. Aggregate loan limits apply. Visit DiscoverStudentLoans.com/Reward for reward and redemption terms and conditions.

Discover Student Loans are made by Discover Bank ©2016 Discover, Bank, Member FDIC
NASFAA is the largest postsecondary education association with institutional membership in Washington, D.C., and the only national association with a primary focus on student aid legislation, regulatory analysis, and training for financial aid administrators in all sectors of post-secondary education. No other national association serves the needs of the financial aid community better or more effectively.

**Conference Program Task Force**
- Taina Savoit, Director of Financial Aid, McNeese State University, SWASFAA, Chair
- Andrew Hammontree, Financial Aid Director, Francis Tuttle Technology Center, SWASFAA Vice Chair
- Joan Bailey, Associate Director, University of South Florida College of Medicine, SASFAA
- Ron Diaz, Director of Student Awards, Stanford University, WASFAA
- Pam Fowler, Executive Director, Office of Financial Aid, University of Michigan, MASFAA
- Ken Kocer, Director of Financial Assistance, Mount Marty College, RMASFAA
- Jason Marrujo, Manager, Financial Aid and Scholarships, Oklahoma State University Center for Health Sciences, SWASFAA
- Rebekah Melville, Director of Financial Aid, Yale University, EASFAA
- Kay Soltis, Director of Financial Aid, Pacific Lutheran University, Commission Director, WASFAA
- Jennifer Jackson, Director of Meetings & Events, NASFAA, Staff Liaison
- Dana Kelly, Chief Training Officer, NASFAA, Staff Liaison
- Debra LaGrone, Training Specialist, NASFAA, Staff Liaison

**Local Arrangements Task Force**
- Brian Lemma, Associate Director, Georgetown University, EASFAA, Chair
- Karen Hanley, Director of University Financial Aid Compliance, Georgetown University, EASFAA
- L. Beth McSweeney, AVP/Campus Relations Manager, PNC Bank Education Loan Center, EASFAA
- Christopher Pollard, Assistant Director, Medical School Financial Aid, The George Washington University, EASFAA
- Meredith Schor, Director of Financial Aid, The George Washington University, EASFAA
- Travis Sturlaugson, Financial Aid Counselor, Montgomery College, EASFAA
- Laurie Buck, Manager Consulting Services, Attain
- Jennifer Jackson, Director of Meetings & Events, NASFAA, Staff Liaison
- Mary Nokes, Meetings, Advertising, and Exhibitor Coordinator, NASFAA, Staff Liaison
**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.

Please take a few minutes after each session to complete our **quick session evaluation**. These evaluations are critical as we continue to strive to offer the best educational opportunities available. The session evaluation form can be accessed through the mobile schedule. Look up the specific session you want to evaluate and select the “Evaluate” button.

Play **Jeopardy Bingo** for a chance to win! Look for your bingo card in your registration bag. There is an “answer” in each square. Visit the sponsors’ booths listed on the card and ask the “question” associated with the “answer” – just like the TV show Jeopardy. Once you complete your bingo card, place it in the drop box located at the NASFAA booth for your chance to win a great prize!

**Extra meal tickets**, if available, may be purchased at the NASFAA on-site registration desk. Meal prices are actual NASFAA cost: Sunday evening dinner $85 (children 12 and under are free); Monday lunch $65; Tuesday lunch $65.

**Exhibits** are located in the exhibit hall BC. For hours, see the conference schedule on page 9 or the Schedule at a Glance. Only registered attendees are permitted access to the Exhibit Hall.

Be sure to visit **NASFAA’s 50th Anniversary Timeline** and **Time Capsule** displays outside the main entrance to the exhibit hall.

The **information desk and message center** are located near NASFAA’s registration desk. Check the message board daily. Forms to post your messages are available at the information desk.

**Charging stations** for your cell phone, iPad, laptop, and other devices are located on the mezzanine level in the Lumina Lounge and the lobby level.

**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, cellular phones, and signal watches during conference functions.
- Use perfume or cologne sparingly, as others around you may be allergic.

**Lumina Lounge: Marriott Foyer**

Stop by the Lumina Lounge to relax, use one of our charging stations and enjoy “Looking Back to Move Forward,” a documentary series produced by Lumina Foundation & the Institute for Higher Education Policy (IHEP). In this series, key policy makers, their staff and education researchers provide insight into the evolution of federal student aid through their first-hand experiences with the process. The lounge will be open throughout the conference.
IMPORTANT INFORMATION ABOUT THE CONFERENCE

You may access the WiFi network for casual use in the meeting space area.

This service is sponsored by Inceptia.

SSID: Marriott Conference
Encryption Key: inceptia
ABOUT OUR SPEAKERS, GENERAL SESSIONS, AND NETWORKING EVENTS

Sunday, July 10, 2016

Opening Session - 12:30pm - 2:00pm
Join us for a unique opening session to celebrate NASFAA’s 50th Anniversary. In addition to featured speaker, Jeannette Walls, you’ll be introduced to special conference guests, the NASFAA chorus will perform, and we’ll debut a video that looks at the evolution of the financial aid industry, celebrates the good work financial aid administrators have done in the past 50 years, and looks toward the future and all we can accomplish in the next 50.

Jeannette Walls – Featured Speaker
Jeannette Walls is best known for her memoir, “The Glass Castle,” which describes growing up in the desert of the American Southwest and then in a West Virginia mining town with her three siblings and her brilliant, unorthodox, irresponsible parents. It has been a New York Times best-seller for more than six years, has sold 4.5 million copies in the United States alone, has been translated into 22 languages, and is being made into a movie by Paramount. It was named one of the “Top 10 Books of the Decade” by Amazon, and has won numerous awards including the Christopher Award, the American Library Association’s Alex Award, and the Books for Better Living Award.


During her speeches at colleges, corporations, and business associations, Walls discusses overcoming hardship and the keys to turning adversity to your advantage. Walls lives in the Piedmont region of Virginia with her husband, writer John Taylor. She has appeared on “Prime Time Live,” “Good Morning America,” “Larry King Live,” “Oprah,” and “The Diane Rehm Show.”

Networking Event – Visit the Exhibit Hall! (and beverage break) - 2:00pm - 3:00pm
Join your colleagues in the exhibit hall to visit with exhibitors and have a cold beverage. This is one of three opportunities to visit the exhibits without having to miss a session. Don’t forget to stop by the NASFAA booth for a demonstration of the new NASFAA Compliance Engine!

NASFAA’s 50th Anniversary Celebration Dinner & Dance - 6:30pm - 10:30pm
Join National Chair Dan Mann in the Marriott Ballroom to enjoy a buffet dinner, music, dancing and other fun activities to celebrate NASFAA’s 50th Anniversary. This is a great way to reconnect with colleagues and meet new friends. A short program will take place at approximately 8:00pm.
Monday, July 11, 2016

Luncheon & Student Aid Success Stories - 12:15pm – 1:45pm
To celebrate our 50th Anniversary, we asked our members to submit their students’ recent success stories and caught up with some folks featured in previous editions of NASFAA’s Student Aid Success Stories. Many of these stories are being compiled into a booklet, which all attendees received courtesy of Great Lakes, and are also available online for all members to enjoy. Join us to hear firsthand from several of these students about the important role financial aid, and administrators like you, played in helping them pursue and achieve their goals. Each of the following speakers will have the floor for five minutes:

Ramon Murguia  
Marylee James  
Tabatha Mcallister  
Janet Murguia  
Mary Eklund  
Amber Briggs

Networking Event - Visit the Exhibit Hall (and anniversary cake!) - 1:45pm – 2:45pm
Join us in the exhibit hall for cake and cold beverages to celebrate NASFAA’s 50th Anniversary! You can then take some time to visit with exhibitors without having to miss a session. Don’t forget to stop by the NASFAA booth for a demonstration of the new NASFAA Compliance Engine!

Networking Event—Un-Wine’d-Hour - 5:00pm - 6:00pm
Join us in the NASFAA exhibit hall to catch up with colleagues, exhibitors, and NASFAA staff. NASFAA University credential holders should meet in the designated lounge just inside the exhibit hall to receive their special recognition gift.

Tuesday, July 12, 2016

Awards Luncheon & Annual Business Meeting - 12:15pm – 2:15pm
Join us as we celebrate the accomplishments of your colleagues as we present a number of awards. You will hear from your departing national chair, Dan Mann, on the state of the association and our future. Lisa Blazer, incoming national chair, will close the NASFAA Time Capsule.

U.S. Department of Education Federal Update With Remarks From Under Secretary of Education Ted Mitchell - 3:45pm - 5:00pm
In this session, Department of Education Federal Student Aid (FSA) representatives will present information about current issues for the Title IV student aid programs and provide updates about the Department’s Title IV activities and initiatives. Prior to FSA’s remarks, guest speaker U.S. Under Secretary of Education Ted Mitchell will take the stage to discuss the Department’s top priorities and regulatory efforts.

U.S. Under Secretary of Education Ted Mitchell – Featured Speaker
Mitchell, who has served in this post since his confirmation by the U.S. Senate on May 8, 2014 following his nomination by President Obama, reports to Secretary of Education John King and oversees policies, programs, and activities related to postsecondary education, adult, career and technical education, federal student aid, five White House Initiatives—Asian Americans and Pacific Islanders, Educational Excellence for Hispanics, Educational Excellence for African Americans, Historically Black Colleges and Universities, and American Indian and Alaska Native Education—and the Center for Faith-Based and Neighborhood Partnerships.

To spur education, economic growth, and social prosperity, Mitchell is charged with planning and policy responsibilities to implement President Obama’s goal for the U.S. to have “the best educated, most competitive workforce in the world” as measured by the proportion of college graduates by the year 2020. Mitchell and his team are keenly focused on implementing President Obama’s American Graduation Initiative to improve college access, affordability, quality, and completion.

Mitchell is the former CEO of the NewSchools Venture Fund and served as the president of the California State Board of Education. Through his long career in higher education, Mitchell has served as the president of Occidental College, vice chancellor and dean of the School of Education and Information Studies at the University of California, Los Angeles, and professor and chair of the Department of Education at Dartmouth College.

Mitchell received his bachelor’s and master’s degrees, and Ph.D. from Stanford University. He lives in Washington, D.C. with his wife, Christine, and their two children.
Wednesday, July 13, 2016

NASFAA Inside the Beltway - 8:30am - 11:00am

Guest speaker Rep. John Kline, chairman of the House Committee on Education and the Workforce, will speak about work the committee has done over the past several years to prepare for reauthorization and will share the committee’s priorities. Following Rep. Kline’s speech, NASFAA President Justin Draeger and Vice President Megan McClean Coval will provide the latest on what’s happening in Washington, D.C., NASFAA’s most recent policy work, and make predictions on where student aid is headed next.

Rep. John Kline (R-MN) – Featured Speaker

Representative John Kline has served as a member of the U.S. House of Representatives from Minnesota’s 2nd congressional district since 2003. In 2010, Rep. Kline was chosen by his Republican colleagues to serve as the Chairman of the Committee on Education and the Workforce, where he continues to serve today.

In his role as chairman, much of his time is spent working to improve the nation’s education system by streamlining spending, promoting flexibility and innovation, and working to improve teacher quality and empower parents.

In August 2013, Rep. Kline joined President Obama as he signed the Bipartisan Student Loan Certainty Act of 2013 (H.R. 1911), legislation that ties student loan interest rates to the market rather than allowing Washington politicians to set the rates. The market-based plan, championed by Kline, kept rates from doubling and actually lowered rates for thousands of graduate and undergraduate students. As Congress continues its efforts to reauthorize the Higher Education Act, Kline is steadfast in his efforts to work toward improving college affordability and access.

Rep. Kline, a 25-year veteran of the Marine Corps, also serves on the House Committee on Armed Services. During his career in the Marine Corps, Rep. Kline served as a helicopter pilot and earned the responsibility of flying Marine One, the president’s personal helicopter. He also served as a personal military aide to Presidents Jimmy Carter and Ronald Reagan.
2016 CONFERENCE SCHEDULE

Note: The numbers following each session (#XXX) refer to the session's ID number, and does not refer to the session location. The location is indicated in italics underneath the session title.

Sunday, July 10

8:00am - 12:30pm Exhibitor Move-In
    Exhibit Hall BC
    Information Desk Open
    Registration Desk Foyer

8:00am - 5:00pm Registration Open
    Registration Desk

8:00am - 5:15pm Lumina Lounge
    Marriott Foyer

9:00am - 11:00am 2017 National Conference Program Task Force Meeting (#106)
    Park 8222
    50th Anniversary Task Force Meeting (#107)
    Park 8219
    Conference Mentors Task Force (#108)
    Park 8210
    Financial Affairs Committee Meeting (#110)
    Park 8211
    PPY Task Force (#111)
    Washington 5

10:00am - 11:00am First-Time Conference Attendees’ Kick-Off Networking Event (#112)
    Sponsored by Edsouth - Virginia Suite

10:30am - 11:45am Community College Caucus (#113)
    Delaware Suite
    Four-Year Public Caucus (#114)
    Wilson ABC
    Independent College Caucus (#116)
    Salon 3 Marriott Ballroom
    Proprietary Sector Caucus (#117)
    Thurgood Marshall West
    Graduate & Professional Institutions Caucus (#115)
    Maryland AB

12:30pm - 2:00pm Opening Session With Keynote by Jeannette Walls (#119)
    Marriott Ballroom

2:00pm - 3:00pm Visit the Exhibit Hall! (and beverage break)
    Sponsored by the College Board - Exhibit Hall BC

2:00pm - 5:15pm Exhibit Hall Open
    Exhibit Hall BC
    Information Desk Open
    Registration Desk Foyer
    NASFAA T-Shirt Sales in the NASFAA Booth
    Exhibit Hall BC
    NASFAA Compliance Engine Demos in the NASFAA Booth
    Exhibit Hall BC
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<th>Time</th>
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<td>3:00pm - 4:00pm</td>
<td>Reflecting a Changing Society: Diversity in the Hiring Process (#120)</td>
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<td>Limiting Loans, Preserving Access (#122)</td>
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<td>PPY Implementation Task Force Update (#121)</td>
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<td>Creating a Professional Development and Human Development Roadmap</td>
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<td>for Yourself and Your Staff (#123)</td>
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<td>VA Benefits and Financial Aid for Graduate and Professional Schools</td>
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<td>Best Practices in Emergency Aid (#125)</td>
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<td>Title IV Verification 2017-18 (#126)</td>
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<td>National Student Loan Data System (NSLDS®) Update (#127)</td>
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<td>Title IV Eligibility of Competency-Based and Direct Assessment Programs</td>
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<td>4:15pm - 5:15pm</td>
<td>Report on Graduate/Professional Financial Aid Award Letter Consumer</td>
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<td>Testing (#131)</td>
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<td>Looking Under the Hood: Using Interactive Tools to Make Better</td>
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<td>Institutional Aid Allocation Decisions (#130)</td>
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<td>NASFAA Standards of Excellence Review Program: Remove the Risk (#129)</td>
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<td>Program-Based Satisfactory Academic Progress—How to Improve Enrollment,</td>
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<td>Student Success and Retention (#132)</td>
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<td>Managing Your Finances - What You Need to Know as a New Director (#133)</td>
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<td>Ready for Implementation? PPY Implementation Case Studies (#134)</td>
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<td>Loan Limits: A Dynamic Approach (#135)</td>
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<td>How Modules Can Affect Title IV (#136)</td>
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<td>Satisfactory Academic Progress for Title IV Eligibility (#137)</td>
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<td>Federal Student Aid’s Enterprise Complaint System (#138)</td>
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<td>6:30pm - 10:30pm</td>
<td>NASFAA’s 50th Anniversary Celebration Dinner &amp; Dance (#139)</td>
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### Monday, July 11

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<tr>
<td>7:00am - 8:15am</td>
<td>Past Presidents and National Chairs Breakfast (#140)</td>
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<td>McKinley</td>
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<td>Loan Counseling Focus Group (#194)</td>
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<td>8:00am - 12:30pm</td>
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<td>NASFAA T-Shirt Sales in the NASFAA Booth</td>
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<td>Lumina Lounge</td>
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<td>8:30am - 9:30am</td>
<td>Cross-Generational Competence: How to Get Multi-Generations to Work Together Effectively (#148)</td>
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<td>Women in Leadership (#147)</td>
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<td>Practical Strategies for Navigating an ED Program Review (#145)</td>
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<td>Making Determinations of Unaccompanied Homeless Youth Status (#142)</td>
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<td>Who Bears the Burden of Student Debt? What Colleges Can Do to Help (#144)</td>
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<td>Developing and Providing Integrated Student Services: The One Stop Shop for Students (#146)</td>
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<td>Leading in Financial Aid in the 21st Century (#143)</td>
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<td>Retiree Group Business Meeting</td>
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<td>NCAA - An Update on Division I Financial Aid Legislation (#149)</td>
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<td>Federal Town Hall (#150)</td>
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<td>Streamlining Scholarship Management With AcademicWorks (#243)</td>
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2016 CONFERENCE SCHEDULE

9:45am - 10:45am
Student Employment Programs That Make Lives Better (#156)
Maryland Suite

Wilson ABC

Institutional Work-Study - Enhanced Student Experience (#155)
Delaware Suite

Validating High School Credentials and the Increased Existence of Diploma Mills (#151)
Thurgood Marshall Southeast

NASFAA’s “The Big Idea” Policy Challenge: Student Aid Modernization Initiative (#152)
Virginia Suite

Helping Former Foster Youth in Higher Education (#154)
Thurgood Marshall North

Direct Loans: Income-Driven Repayment Plans (PAYE & REPAYE) (#158)
Roosevelt 123

The Federal Perkins Loan Program Update (#159)
Washington 1/2

Experimental Sites (#160)
Washington 4

Graduate/Professional Town Hall Meeting (#157)
Thurgood Marshall West

F College Board - PowerFAIDS for Non-Traditional Programs: A Flexible Software Solution for Flexible Financial Aid (#161)
Coolidge

10:45am - 11:00am Beverage Break
Sponsored by the College Board - Exhibit Hall BC, Marriott Foyer, Virginia Foyer

11:00am - 12:00pm
Offloading the Additional Weight of Student Loans: Default Management Strategies That Work (#166)
Thurgood Marshall Southeast

Coupling New Student Orientation With Financial Aid and Financial Literacy (#164)
Delaware Suite

P Managing Your Team (#168)
Wilson ABC

The Recipe for “Tried and True” Graduate Student Financial Literacy Programs (#165)
Thurgood Marshall West

Affecting Practice and Policy With Financial Aid Research (#163)
Thurgood Marshall North

One Grant/One Loan: The Future of Federal Student Aid? (#162)
Virginia Suite

Making the Most of Your Membership - Using NASFAA Tools (#167)
Maryland Suite

Title IV Verification 2017-18 (#169)
Washington 1/2

Common Origination and Disbursement (COD) Update (#170)
Washington 4

Gainful Employment Update (#171)
Roosevelt 123

F College Ave Student Loans Session (#244)
Coolidge

12:15pm - 1:45pm Luncheon (#172)
Marriott Ballroom

1:45pm - 4:30pm Information Desk Open
Registration Desk Foyer
2016 CONFERENCE SCHEDULE

1:45pm - 5:30pm
NASFAA T-Shirt Sales in the NASFAA Booth
Exhibit Hall BC

NASFAA Compliance Engine Demos in the NASFAA Booth
Exhibit Hall BC

1:45pm - 6:00pm
Exhibit Hall Open
Exhibit Hall BC

2:45pm - 3:45pm
Prior-Prior Year From the Admission Perspective (#175)
Delaware Suite

Entrance and Exit Counseling: Strategies to Get the Most Significant Results! (#179)
Wilson ABC

Outcomes From the Task Force Examining the Lack of Graduate-Specific Data (#177)
Thurgood Marshall North

Is Your Campus Ready for PPY? (#174)
Thurgood Marshall Southeast

Graduate/Professional School Recommendations for ED’s StudentAid.gov and StudentLoans.gov Websites (#173)
Thurgood Marshall West

Only 3,650 More Days Until Retirement, But Who’s Counting?! (#178)
Virginia Suite

The Cost of Opportunity: Student Loans and Social Mobility (#176)
Maryland Suite

Direct Loans: Public Service Loan Forgiveness Program (#180)
Roosevelt 123

Cash Management Regulations Overview (#181)
Washington 1/2

CampusLogic - Boost Student Engagement in the Aid Office (#182)
Coolidge

4:00pm - 5:00pm
Comparing Income-Driven Repayment Plans for Graduate and Professional Borrowers (#187)
Thurgood Marshall West

Developing an Office Operational Calendar (#184)
Thurgood Marshall Southeast

How to Solve Your Student Engagement Dilemma (#186)
Wilson ABC

Next Steps in FAFSA Simplification (#183)
Thurgood Marshall North

Creating an Introvert-Friendly Workplace (#185)
Maryland Suite

Sharing Financial Aid Application Information and FERPA (#188)
Virginia Suite

HEA Preview With Congressional Staff (#189)
Delaware Suite

Federal Cohort Default Rate: Default Management Plan Requirements and Tools (#190)
Roosevelt 123

Title IV Third-Party Servicers (#191)
Washington 1/2

FSA’s Integrated Partner Management Solution (#192)
Washington 4

5:00pm - 6:00pm
Un-Wine’d-Hour in the Exhibit Hall (#193)
Exhibit Hall BC
Tuesday, July 12

7:00am - 8:15am
Regional and State Presidents Breakfast (#195)
McKinley
Loan Counseling Focus Group (#194)
Park 8210

7:15am - 8:15am
SOE Team Meeting (#196)
Park 8206

7:30am - 12:00pm
Registration Open
Registration Desk

7:45am - 8:30am
Grab & Go Breakfast
Marriott Foyer

8:00am - 12:00pm
Exhibit Hall Open
Exhibit Hall BC
Information Desk Open
Registration Desk Foyer
NASFAA Compliance Engine Demos in the NASFAA Booth
Exhibit Hall BC

8:00am - 5:00pm
Lumina Lounge
Marriott Foyer

8:30am - 9:30am
Veterans’ Re-Entry Experience and Financial Aid’s Role (#202)
Virginia Suite
Women and Men in Leadership: Developing YOUR Identity as a Successful Leader (#203)
Washington 4
In the Zone: Creating a Compliance Environment in the Financial Aid Office (#198)
Thurgood Marshall Southeast
Best Practices for Recruitment, Admission and Retention of DREAMers (#197)
Delaware Suite
Tuition Discounting: Results From the 2015 NACUBO Tuition Discounting Survey (#201)
Thurgood Marshall North
Restructuring Institutional Financial Aid Programs Revisited (#200)
Wilson ABC
Perspectives: Minorities in Leadership (#204)
Maryland Suite
Federal Town Hall (#205)
Washington 1/2

College Board – CSS/Financial Aid PROFILE: A Streamlined Solution for Graduate, Professional and International Aid Applications (#206)
Coolidge

Findings from NASFAA’s Survey of College Presidents (#199)
Roosevelt 123
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tr>
<td>9:45am - 10:45am</td>
<td>Portability of Financial Aid for International Programs: Opening the Door (#209) Delaware Suite</td>
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<td>Negotiated Rulemaking: Being at the Table to Write Regulations (#211) Thurgood Marshall Southeast</td>
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<td>Federal Student Aid and Reauthorizing the Higher Education Act (#207) Thurgood Marshall North</td>
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<td>Exploring Data Resources for Graduate and Professional Education (#208) Thurgood Marshall West</td>
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<td>Creating an LGBT-Friendly Workplace (#210) Washington 4</td>
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<td>Competency-Based Education for Millennials and Beyond (#212) Wilson ABC</td>
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<td>House Oversight Update (#214) Virginia Suite</td>
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<td>The Federal Perkins Loan Program Update (#215) Roosevelt 123</td>
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<td>The FSA ID - Resources for Assisting Students, Parents, and Borrowers (#128) Washington 1/2</td>
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<td>College Ave Student Loans Session (#244) Coolidge</td>
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<td>10:45am - 11:00am</td>
<td>Beverage Break</td>
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<td>Sponsored by the College Board - Exhibit Hall BC, Marriott Foyer, Virginia Foyer</td>
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<td>11:00am - 12:00pm</td>
<td>Best Practices for Schools That Share a Student (#218) Thurgood Marshall Southeast</td>
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<td>Prior to PPY (#217) Thurgood Marshall North</td>
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<td>Financial Wellness: Student Impact is a Collaborative Effort (#220) Wilson ABC</td>
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<td>A New Definition for College Affordability - Exploring the Implications of Lumina’s “Rule of 10” Benchmark (#221) Maryland Suite</td>
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<td>What’s New with Regulatory Burden Relief? (#222) Delaware Suite</td>
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<td>College Promise Campaign: Investing in America’s Future (#223) Virginia Suite</td>
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<td>Gainful Employment Update (#224) Washington 1/2</td>
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<td>Early FAFSA® and Use of Prior-Prior Year Income (#225) Roosevelt 123</td>
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<td>Cybersecurity Requirements for Institutions of Higher Education (IHE) (#226) Washington 4</td>
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<td>CampusLogic - Get Insights From Your Financial Aid Data Instantly (#227) Coolidge</td>
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<td>12:15pm - 2:15pm</td>
<td>Awards Luncheon &amp; Annual Business Meeting (#228) Marriott Ballroom</td>
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<td>2:15pm - 4:15pm</td>
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<td>NASFAA Compliance Engine Demos in the NASFAA Booth Exhibit Hall BC</td>
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SAVE THE DATE IN JUNE!

NEXT YEAR’S NATIONAL CONFERENCE IS IN JUNE - AND STARTS ON MONDAY THE 26TH!

SO MARK YOUR CALENDARS, AND GET READY TO JOIN NASFAA FOR FUN IN THE SUN IN 2017!
2:30pm - 3:30pm
Financial Aid in a Hashtag World (#229)
Wilson ABC
What Financial Aid Officers Should Know About Community College HEA Reauthorization Priorities (#231)
Washington 4
Integrating Public Benefits into Campus Services and Financial Aid to Facilitate College Completion (#230)
Delaware Suite
NASFAA Quiz Show (#233)
Thurgood Marshall Southeast
From Application to Graduation: Behavioral Science Insights For Building Student Success (#234)
Maryland Suite
Results From NASFAA’s Grant to Examine Federal Work-Study (#236)
Thurgood Marshall North
Town Hall: Planning NASFAA’s Future (#235)
Virginia Suite
Cash Management Regulations Overview (#237)
Washington 1/2
Resolving Citizen and Eligible Non-Citizen Issues for Title IV Eligibility (#238)
Roosevelt 123
One University, Many Schools (#232)
Thurgood Marshall West
Streamlining Scholarship Management With AcademicWorks (#243)
Coolidge

3:45pm - 5:00pm
U.S. Department of Education Federal Update (#239)
Marriott Ballroom

4:15pm - 7:00pm
Exhibit Hall Tear-Down
Exhibit Hall BC

Wednesday, July 13

7:45am - 8:30am
Grab & Go Breakfast
Marriott Foyer

8:30am - 11:00am
NASFAA Inside the Beltway (#240)
Salon 2 Marriott Ballroom

8:30am - 11:30am
NASFAA University - Consumer Information (#241)
Salon 1 Marriott Ballroom
NASFAA University - Administrative Capability (#242)
Maryland Suite
CONCURRENT INTEREST SESSIONS

Note: The numbers following each session (#XXX) refer to the session’s ID number, and does not refer to the session location. The location is indicated in italics underneath the session title.

Sunday
3:00pm - 4:00pm

**Reflecting a Changing Society: Diversity in the Hiring Process (#120)**

*Virginia Suite*

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. It’s necessary to have diversity within your staff in order to accomplish this feat. 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:*
Isela Boehm, Associate Director, Johns Hopkins University School of Nursing
Tiffany Gibbs, Compliance Products Manager, NASFAA

**Limiting Loans, Preserving Access (#122)**

*Delaware Suite*

Presenters from New America will share what schools have considered when restricting unsubsidized borrowing under the Department of Education’s loan limit experiment. Research presented will highlight the challenges facing institutions and how loan limits or alternative aid disbursement may address them. Presenters will discuss the impact of these experiments on enrollment, retention, graduation, and student indebtedness. Discussion will broadly weigh the risks, for low-income students especially, if all institutions were given authority to set loan limits as they see fit. The session will also explore how many students have been limited under a current federal loan system that offers little flexibility and leads colleges to opt out completely.

*Moderators:*
Amy Laitinen, Director for Higher Education, New America
Ben Barrett, Research Assistant, New America

*Speakers:*
Michelle W. Chapman, Director of Financial Aid, Atlanta Metropolitan College
Debbie Cochrane, Research Director, The Institute for College Access & Success, Inc.
Kelly Morrissey, Director of Financial Aid, Mount Wachusett Community College

**PPY Implementation Task Force Update (#121)**

*Thurgood Marshall Southeast*

On September 14, 2015, President Obama announced that the Department of Education (ED) will use prior-prior year (PPY) income data for financial aid purposes beginning with the 2017-18 award year. As a result, NASFAA formed a task force to identify potential roadblocks to successful implementation and develop strategies to overcome those barriers. This session will provide an overview of their work so far. The task force continues to collaborate with ED to help ensure a successful PPY rollout and will conduct a post-mortem after the first year of PPY to deliver final recommendations on the evolution of PPY going forward.

*Moderator:*
Megan McClean Coval, Vice President, NASFAA

*Speakers:*
Rachelle Feldman, Assistant Vice Chancellor and Director of Financial Aid, University of California, Berkeley
Megan McClean Coval, Vice President, NASFAA

**Creating a Professional Development and Human Development Roadmap for Yourself and Your Staff (#123)**

*Maryland Suite*

This session will discuss the importance of creating and maintaining a comprehensive professional development roadmap for immediate use for your office. The roadmap will contain college professional development, internal financial aid services training, NASFAA University resources and webinars, business partner training, policies and procedure manuals, financial aid data systems, human development traits for financial aid and an access database to monitor all training activities will be discussed. Strategies to allocate professional development funds for travel and campus visits will also be presented. Remember, our student services and compliance is directly tied to the development of our staff and ourselves!

*Moderator:*
Wayne Kruger, Executive Director Financial Assistance Operations, St. Petersburg College Seminole Campus

*Speakers:*
Michael J. Bennett, Associate Vice President of Financial Assistance Services
JoEllen Soucier, Executive Director of Financial Aid, Houston Community College System Central College
INTEREST SESSIONS
Sunday 3:00pm - 4:00pm

VA Benefits and Financial Aid for Graduate and Professional Schools (#124)
Wilson ABC
It takes extra effort on the part of schools to ensure veterans and their dependents—who are receiving transferred VA benefits—are effectively using their earned education benefits in transitioning from the military to higher education. We will discuss all that this entails during this session.
Speakers:
Edmund Lizotte, Director of Military Student Recruiting and Services, Johnson & Wales University
David Renza, Northeastern University

Best Practices in Emergency Aid (#125)
Thurgood Marshall North
This session will discuss the impact a small, one-time resource, provided to students who experience an unforeseen financial crisis, can have on improving your institution’s retention and graduation rates. You will hear about the components needed for a robust emergency aid program, what is needed to administer the program across your campus, how to market the program and how to ensure sustainability. Three experts will provide a well-rounded view of the solution, including investment and research perspectives from a philanthropic organization, a national higher education organization, and a senior leader from a college that has implemented a viable program.
Moderator:
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA
Speakers:
Sarah Bauder, Senior Program Officer, Gates Millennium Scholars
Amelia Parnell, Vice President for Research and Policy, NASPA
Michael Baston, La Guardia Community College

Title IV Verification 2017-18 (#126)
Washington 1/2
This session will discuss verification requirements for 2017-18, including FAFSA data subject to verification, changes to verification tracking groups, and acceptable documentation.
Moderator:
Jack Edwards, Director of Financial Aid, Stanford University Graduate School of Business
Speakers:
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
Jeff Baker, Federal Student Aid, U.S. Department of Education

National Student Loan Data System (NSLDS®) Update (#127)
Roosevelt 123
In this session, presenters will recap the changes made to the National Student Loan Data System (NSLDS) websites, reports for schools, and enrollment reporting in 2015. Presenters also will inform schools of changes planned for 2016.
Moderator:
Lissa B. Powell, Associate Director, The University of Alabama at Birmingham
Speakers:
Valerie Sherrer, Supervisory Program Specialist, U.S. Department of Education

Title IV Eligibility of Competency-Based and Direct Assessment Programs (#216)
Washington 4
This session will provide an overview of the important regulatory provisions that apply to competency-based education programs, including direct assessment programs. Information will be provided about the application process for direct assessment programs, requirements for regular and substantive interaction in competency-based distance education programs, the application of R2T4, and satisfactory academic progress requirements for competency-based programs.
Moderator:
Wynette Zuppardi, Director of Financial Services, Brown University
Speakers:
David Musser, Program Specialist, U.S. Department of Education
Greg Martin, U.S. Department of Education
4:15pm - 5:15pm
Report on Graduate/Professional Financial Aid Award Letter Consumer Testing (#131)

Thurgood Marshall West
The Consumer Information & Law Student Indebtedness Task Force was convened after receiving a grant from Access Group. The task force was charged with determining what consumer information would be most helpful to current and prospective law students. Through consumer testing conducted by Coffey Consulting, LLC, the 10-person task force has made recommendations on how financial aid award letters and the Department of Education’s Shopping Sheet can be modified to help students make better-informed borrowing and enrollment decisions. Regardless of what graduate discipline you serve, this session will help you tailor award letters to better meet the needs of graduate students.

Moderator: Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA
Speakers: Jared Smith, Director, Law School Financial Aid, The George Washington University
Gina Soliz, Senior Associate Dean and Director of Financial Aid, Colgate University

Looking Under the Hood: Using Interactive Tools to Make Better Institutional Aid Allocation Decisions (#130)
Thurgood Marshall North
The National Association of College and University Business Officers (NACUBO) and the Association of Governing Boards of Universities and Colleges (AGB) have developed a web-based tool that enables financial aid administrators to track the institutional grant aid expenditures at their institutions and compare their aid expenditures against peer institutions. The aid metrics in the tool help institutional leaders make informed decisions about institutional aid policies, practices, and budget allocations. This session will review the “Looking Under the Hood” project, and provide a demonstration of the project’s web-based tool. Session participants will also be given the opportunity to sign up for access to the tool for their campuses.

Moderator: Lesley McBain, Assistant Director, Research and Policy Analysis, National Association of College & University Business Officers (NACUBO)
Speakers: Ken E. Redd, Director, Research and Policy Analysis, National Association of College & University Business Officers (NACUBO)
Eileen O’Leary, Assistant Vice President Student Financial Assistance, Stonehill College
Albert Hermsen, Retiree, University of Michigan

NASFAA Standards of Excellence Review Program: Remove the Risk (#129)
Thurgood Marshall Southeast
When schools are not in compliance with Title IV rules and regulations, the risk can be very high. In addition to imposing monetary fines, the Department of Education will publish findings publicly. NASFAA offers a service to help remove the risk of compliance findings: Standards of Excellence (SOE) Review Program. Hear first-hand from two schools that participated in an SOE review: University of California at Davis and Campbell University. Learn how the SOE program compares to an ED program review and how NASFAA can help reduce the risk of compliance issues at your institution.

Moderator: Phillip Asbury, Deputy Director of Scholarships & Student Aid, University of North Carolina at Chapel Hill
Speakers: Mandy Sponholtz, SOE Review Program Administrator, NASFAA
Deborah Agee, Director, Financial Aid & Scholarships, University of California, Davis
James White, Dean, Student Financial Services, Gonzaga University
Mary Kosin, Director of Financial Aid, Campbell University

Program-Based Satisfactory Academic Progress—How to Improve Enrollment, Student Success and Retention (#132)
Delaware Suite
Many institutions require students to submit ALL college transcripts for admissions and to assess Satisfactory Academic Progress for financial aid—but that’s not necessary. Come to this session to learn how a program-based Satisfactory Academic Progress (SAP) assessment can provide a fresh start by not penalizing a student for coursework not in their degree program. This session will discuss redesigning institutional and financial aid SAP policies, involving key offices. When the new policies were applied at the presenters’ school, students in good academic standing went up 33 percent, and students not meeting financial aid SAP decreased by 40 percent. This innovative model supports national trends to have tremendous gains in promoting retention and student success.

Moderator: Joan D. Bailey, Associate Director, University of South Florida
Speakers: Wayne Kruger, Executive Director Financial Assistance Operations, St. Petersburg College Seminole Campus
Michael J. Bennett, Associate Vice President of Financial Assistance Services
Todd Smith, Director of Financial Assistance Services, St. Petersburg College Gibbs Campus
Managing Your Finances - What You Need to Know as a New Director (#133)

Maryland Suite
As a director, you have the fiduciary responsibility to manage your operational and financial aid budgets. Part of your role is advocating for resources. This session will provide you with advice and examples for maneuvering the intricacies of fiscal management.

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

Speakers:
Paula Luff, Associate Vice President Enrollment Services, DePaul University
Lisanne Masterson, Director, Financial Aid, Blue Ridge Community College

Ready for Implementation? PPY Implementation Case Studies (#134)

Virginia Suite
With the move to prior-prior year (PPY) and Early FAFSA right around the corner there's a clamoring for training, information, and materials to ensure that implementation goes smoothly. This session will feature case studies from several institutions related to the specific work they are doing to prepare for PPY and Early FAFSA. Come to this session to get ideas, get inspired, and engage with colleagues on the upcoming implementation of this major, but exciting, policy change.

Moderator:
Heather Boutell, Director, Financial Aid, Bellarmine University

Speakers:
Ron Day, Director of Financial Aid, Kennesaw State University
Candance Frazier, Senior Associate Director, West Virginia University
Dustin Smith, Assistant Director of Financial Aid, University of San Francisco
Megan McClean Coval, Vice President, NASFAA

Loan Limits: A Dynamic Approach (#135)

Wilson ABC
A hot topic in reauthorization is loan limits. What do we do with them? Are they high enough? Are they too low? Should they vary? The impetus for change is the general sense that current limits do not allow undergraduate students without parental support to finance higher education without turning to more expensive alternatives. NASFAA’s Dynamic Loan Limits Working Group explored the idea of varying loan limits for different schools or students, based on established criteria, such as program of study or meeting certain thresholds. This session will explore the work of this group, leaving plenty of time for discussion.

Moderator:
Justin Draeger, President, NASFAA

Speakers:
Lisa Blazer, Senior Associate Vice President for Student Affairs, University of Texas at San Antonio
Mark L. Lindenmeyer, Assistant Vice President of Enrollment Management & Director of Financial Aid, Loyola University Maryland
Laurie Wolf, Executive Dean of Student Services, Des Moines Area Community College

How Modules Can Affect Title IV (#136)

Washington 1/2
Any course in a program that does not span the entire length of a payment period or a period of enrollment is considered to be a module. This session will explain how to administer Title IV aid when your standard term academic calendar contains modules. Modules may be included exclusively or in conjunction with full-term courses, year-round, or only during a summer term. All of these scenarios will be discussed.

Moderator:
Ebony Carter, Assistant Director, Northeastern University

Speakers:
Kevin Campbell, Training Officer, U.S. Department of Education
Greg Martin, U.S. Department of Education

Satisfactory Academic Progress for Title IV Eligibility (#137)

Roosevelt 123
This session will offer instruction on how to evaluate Satisfactory Academic Progress (SAP) in accordance with applicable laws and regulations. It will also include an explanation of key concepts such as qualitative and quantitative assessments, pace of completion, and maximum time frame, as well as warning and probation periods, appeals, and academic plans. In addition, the session will cover the elements that a school is required to include in its SAP policy.

Moderator:
Kella Helyer, Director of Financial Aid, Columbia Gorge Community College

Speaker:
David Bartnicki, Training Officer, U.S. Department of Education
Federal Student Aid’s Enterprise Complaint System (#138)
Washington 4
President Obama’s Student Aid Bill of Rights, announced in 2015, directed the Department of Education (ED) to “create a responsive student feedback system” for customers of federal student aid programs. The Enterprise Complaint System is now operational, enabling customers to provide ED with feedback related to their student aid experience and receive clear resolutions faster and easier than ever before. This session will provide an overview of what the system does, and does not, mean for institutions and other ED partners in the federal aid environment.

Moderator:
Dustin Davidson, Financial Aid Coordinator, Moore Norman Technology Center

Speaker:
Kevin Suyó, U.S. Department of Education

Monday
8:30am - 9:30am
Roosevelt 123
For the first time, four generations are present in the workplace. Late traditionalists and baby boomers are rubbing elbows on a daily basis with Gen-Xers and Millennials. Each generation approaches work from a different perspective—the challenge is to get them to all work together toward a common goal. Representatives from each generation will examine case studies from their unique perspective and share ideas about how to utilize each other’s strengths.

Moderator:
Brenda Hicks, Director of Financial Aid, Southwestern College

Speaker:
Laura Hughes, Director of Financial Aid, Lewis-Clark State College

Women in Leadership (#147)
Washington 4
For the first time in history, both political parties have courted the idea of a woman in the position of nominee for the office of President of the United States. Are women finally reaching the ideal of equality pursued since the ratification of the 19th Amendment in August of 1920? This panel of female leaders at various levels of organizational structure will share their journeys, wisdom and perspectives on being a woman in today’s workplace.

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

Speakers:
Youlonda Copeland-Morgan, Associate Vice Chancellor, Enrollment Management, University of California at Los Angeles
Marta Perez Drake, Vice President, Professional Development, National Association of College & University Business Officers (NACUBO)

Practical Strategies for Navigating an ED Program Review (#145)
Thurgood Marshall Southeast
This session will cover practical strategies for helping schools prepare for and navigate through Department of Education (ED) program reviews. Experienced presenters, including campus financial aid directors and an attorney who has advised numerous schools on dealing with ED program reviews, will provide specific suggestions and tips 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 their own “war stories” and will offer approaches that have worked well, or not so well, in prior program reviews.

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

Speakers:
Matthew Moore, Director of Financial Aid & Scholarships, Sinclair Community College
Kathy Cheatham, Senior Vice President of Student Finance, Education Corporation of America
Blain Butner, Co-Chair Higher Education Practice, Cooley LLP

Making Determinations of Unaccompanied Homeless Youth Status (#142)
Delaware Suite
The College Cost Reduction and Access Act (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.

Moderator:
Jennifer Martin, Director of University Financial Aid Compliance, Johns Hopkins University

Speakers:
Jennifer Martin, Director of University Financial Aid Compliance, Johns Hopkins University
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
Who Bears the Burden of Student Debt? What Colleges Can Do to Help (#144)

Thurgood Marshall North

Beyond the headlines about growing loan amounts, it is important to recognize that the burden of student debt does not fall equally among all students. During this interactive session, presenters will share the latest data on which types of students are most likely to borrow, borrow more, and have trouble repaying their loans. Presenters from a community college and public flagship university will discuss policies and practices they have implemented to help students manage their debt, including data-driven approaches to improve completion and the Carolina Covenant—an institutional pledge that allows eligible low-income students to graduate debt-free.

Moderator:
Debbie Cochrane, Research Director, The Institute for College Access & Success, Inc.

Speakers:
Laurie Wolf, Executive Dean of Student Services, Des Moines Area Community College
Ann Trollinger, Senior Assistant Director for the Carolina Covenant, University of North Carolina at Chapel Hill
Debbie Cochrane, Research Director, The Institute for College Access & Success, Inc.

Developing and Providing Integrated Student Services: The One-Stop Shop for Students (#146)

Wilson ABC

This session will provide an overview of how integrated student services can be developed at your institution with the goal of streamlining the delivery of student services. The presenters will discuss student services integration across several dimensions, including virtual, physical, and organizational integration. By deconstructing operational silos, streamlining processes, and cross-training staff, operational efficiencies and improved student satisfaction can be attained. The presenters will highlight the University of Minnesota’s successful One Stop Student Services Office and participants will leave with a thorough understanding of various approaches to creating an integrated services model on their campus.

Moderator:
Tina Falkner, Director, Office of Student Finance, University of Minnesota, Twin Cities

Speakers:
Julie Selander, Director, One Stop Student Services, University of Minnesota, Twin Cities
Marcia J. DeGaetano, One Stop Assistant Director, University of Minnesota, Twin Cities

Streamlining Scholarship Management With AcademicWorks (#243)

Coolidge

As students and parents struggle to pay for higher education, the need for scholarships is vital for colleges and universities to stay competitive when recruiting and retaining top talent. During this session we will explore how the AcademicWorks Scholarship Management Platform can revolutionize your entire scholarship process to improve student access to scholarships, enhance donor engagement, and maximize fund utilization.

Speaker:
Brandon Phipps, Chief Executive Officer, AcademicWorks

Leading in Financial Aid in the 21st Century (#143)

Virginia Suite

Today’s financial aid leaders must anticipate and adapt to the ever-changing landscape created by Congress, technology, and the college environment. A leader in the financial aid industry needs to assess what is needed for successful and productive change. This session will encompass effective strategies for engaging in professional development, leveraging technology, rethinking communication, and more.

Moderator:
Gena Boling, Associate Director, University of Missouri

Speakers:
Justin Chase Brown, Director, Scholarships & Financial Aid, University of Nebraska - Lincoln
Nicholas W. Prewett, Director of Financial Aid, University of Missouri

NCAA - An Update on Division I Financial Aid Legislation (#149)

Maryland Suite

This session, intended for National Collegiate Athletic Association (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:
Pamela W. Fowler, Executive Director, Office of Financial Aid, University of Michigan

Speaker:
Kris Richardson, Director of Academic and Membership Affairs, National Collegiate Athletic Association
Federal Town Hall (#150)
Washington 1/2
Presenters from the U.S. Department of Education will respond to questions and comments from the audience.
Moderator:
Mendy Schmerer, Assistant Director, University of Oklahoma Health Sciences Center
Speakers:
Jeff Baker, Federal Student Aid, U.S. Department of Education
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
Susan O’Flaherty, U.S. Department of Education
Jeff Appel, U.S. Department of Education
Misty Parkinson, U.S. Department of Education
Ron Bennett, FSA, Business Operations, Acting Director, NSLDS, U.S. Department of Education

9:45am - 10:45am
**Strategies to Improve Student Loan Counseling: Expert Peers Will Help You Build a Better Program (#153)**
Wilson ABC
Students need effective counseling to help them successfully navigate student loan borrowing and repayment, but what makes counseling effective? In consultation with NASFAA, researchers at TG conducted extensive research on the history and current practices of student loan counseling. Drawing on research at over 20 campuses, presenters will outline common barriers to effectiveness, promising practices, and recommendations for improving the counseling process. Presenters will include financial aid staff from various school sizes and types. Attendees will explore ways to improve loan counseling on their own campuses through facilitated small and large group discussions.
Moderator:
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA
Speakers:
Jeff Webster, Assistant VP/Research & Analytical Services, TG
Cheryl A. Willard, Associate Director, Baldwin Wallace University
Billie Jo Hamilton, Assistant Vice President, Enrollment Planning & Management, University of South Florida
Joan A. Zanders, Director of Financial Aid, Northern Virginia Community College

**Student Employment Programs That Make Lives Better (#156)**
Maryland Suite
Student employment can be a hidden jewel. It can offer valuable benefits beyond the completion of a job and income. With the right insight, planning and practices, both employer and student can turn a campus employment situation into a collaboration that offers long-term success. Attend this session to explore the successful outcomes of student employment programs at different institutions within the country. We will uncover their strategies, key practices, and long-term successes, so you can move your program from good to great.
Moderator:
Tracey Mingo, Director, Financial Aid, Georgia Southern University
Speakers:
Keyimani L. Alford, Training Specialist, Great Lakes Higher Education Corporation & Affiliates
Karla Weber, Senior Financial Aid Advisor, University of Wisconsin - Madison
Julie Waldvogel-Leitner, Financial Aid Manager, Moraine Park Technical College

**Institutional Work-Study - Enhanced Student Experience (#155)**
Delaware Suite
See how Missouri University of Science and Technology used a different approach to a work-study program designed to increase retention rates of low-income students at a rate greater than the campus average. Students selected for this program were paired with ‘Champion’ departments across campus and were given requirements to accomplish across campus, including meetings and quarterly evaluations with their supervisors, in order to increase their success on campus as well as create a sense of belonging to the university.
Speaker:
Bridgette Betz, Director, Missouri University of Science and Technology
Validating High School Credentials and the Increased Existence of Diploma Mills (#151)

Thurgood Marshall Southeast

Possessing a high school diploma or its equivalent is a major student aid eligibility requirement. The elimination of the Ability-to-Benefit (ATB) requirement in 2012 and the implementation of standardized graduation tests has created a breeding ground for the existence of diploma mills. This session will discuss some of the efforts being made by state and federal government officials to combat diploma mills. What is required of schools to validate high school credentials? Are you in compliance? What are some best practices when determining whether a diploma is valid for the purpose of qualifying for federal student aid? Where does a “home school” fit into the validation discussion?

Moderator:
Nadine Bailey, Student Finance Director, Ultimate Medical Academy

Speakers:
JoEllen Soucier, Executive Director of Financial Aid, Houston Community College System Central College
Robert Merino, Dean of Financial Aid Services, San Jacinto College
Wayne Kruger, Executive Director Financial Assistance Operations, St. Petersburg College Seminole Campus

Helping Former Foster Youth in Higher Education (#154)

Thurgood Marshall North

Despite being among the most disadvantaged groups with respect to college access and success in the United States, not much is known about the attainment of former foster youth. This lack of knowledge is somewhat surprising considering that graduation rates range from one percent - 11 percent (Dworsky & Havlicek, 2010; Pecora, Williams, Kessler, Downs, & O’Brien, 2003). This session will provide a longitudinal overview of former foster youth in higher education, their receipt of financial aid, and their educational outcomes. Presenters will encourage attendees to engage in a discussion about what financial aid practitioners can do, in light of the data.

Moderator:
Jacob Gross, Assistant Professor, Department of Educational Leadership, Evaluation and Organizational Development, University of Louisville

Speakers:
Dan Davenport, Director of Financial Aid, University of Idaho
Jacob Gross, Assistant Professor, Department of Educational Leadership, Evaluation and Organizational Development, University of Louisville
Richard Heath, Director, Student Financial Services, Anne Arundel Community College

Direct Loans: Income-Driven Repayment Plans (PAYE & REPAYE) (#158)

Roosevelt 123

Income-driven repayment (IDR) plans can provide critical relief for federal student loan borrowers. This session will provide an overview of Federal Student Aid’s IDR plans, including borrower eligibility criteria and loan forgiveness provisions.

Moderator:
Ken Kocer, Director of Financial Assistance, Mount Marty College

Speakers:
Ian Foss, Program Specialist, U.S. Department of Education
Barbara Hoblitzell, U.S. Department of Education

The Federal Perkins Loan Program Update (#159)

Washington 1/2

This session will provide an update on the Perkins Loan Extension Act of 2015 and other important details about the Federal Perkins Loan Program. This session will also review the steps and process institutions must use when assigning Perkins Loans to the Department of Education, as well as the process institutions must use to end their participation in the Federal Perkins Loan Program.

Moderator:
Kay W. Soltis, Director of Financial Aid, Pacific Lutheran University

Speakers:
Brian Smith, U.S. Department of Education
Greg Gerrans, U.S. Department of Education
Tamy L. Garofano, Program Specialist, Policy Liaison and Implementation, U.S. Department of Education
Experimental Sites (#160)
Washington 4
This session will provide information about both the ongoing and new experiments under the Experimental Sites Initiative. It will provide information on the requirements for each experiment, its implementation, and information about reporting and evaluation.
Moderator:
Kathryn Stone, Director of Financial Aid, American College of Healthcare Sciences
Speakers:
Craig Munier, Program Specialist, U.S. Department of Education
Warren Farr, Management/Program Analyst, U.S. Department of Education
Anne Tuccillo, Management/Program Analyst, U.S. Department of Education

Graduate/Professional Town Hall Meeting (#157)
Thurgood Marshall West
This town hall meeting will provide an opportunity for NASFAA graduate and professional aid administrators to discuss issues and concerns directly with NASFAA to ensure the needs of graduate and professional members are being heard.
Moderator:
Justin Draeger, President, NASFAA
Speakers:
Daniel Mann, Director of Financial Aid, University of Illinois at Urbana-Champaign
Lisa Blazer, Senior Associate Vice President for Student Affairs, University of Texas at San Antonio
Gina Soliz, Senior Associate Dean and Director of Financial Aid, Colgate University

College Board - PowerFAIDS for Non-Traditional Programs: A Flexible Software Solution for Flexible Financial Aid (#161)
Coolidge
Join College Board staff and financial aid professionals to learn how PowerFAIDS helps institutions efficiently and equitably process financial aid for non-traditional programs. More than 650 postsecondary institutions – large and small – use PowerFAIDS to provide smarter, faster service to students while making sure they’re in compliance with the latest federal requirements. PowerFAIDS institutions offer non-traditional programs, modular calendars, and borrower-based academic years. In this session you will see examples of how institutions use PowerFAIDS to support these fast growing programs. We invite attendees to bring questions and examples of their programs, regardless of which financial aid management system they presently use.
Moderator:
Michael Cronin, Director, The College Board
Speaker:
Joseph Farrell, Director, Financial Aid Software Products, The College Board

11:00am - 12:00pm
Offloading the Additional Weight of Student Loans: Default Management Strategies That Work (#166)
Thurgood Marshall Southeast
Just like exercise, there’s no one-size-fits-all approach to offloading the additional weight of student loans from borrowers and maintaining a healthy default rate. Looking across the higher education industry, there are many institutions that are “losing and maintaining the weight” through their default management strategies. Even with the national default rate dropping, managing your cohort, and corresponding cohort default rate (CDR), should remain a priority; it has an effect on your reputation, students, and survival. Join us during this panel discussion as we hear from two institutions about their lessons learned and best practices from crafting and implementing a default management strategy.
Moderator:
Dave Macoubrie, Vice President Repayment Solutions, Inceptia
Speakers:
John Lally, Director of Financial Aid, Florida Institute of Technology
Amy Cable, Director, Financial Aid, Baton Rouge Community College

Coupling New Student Orientation With Financial Aid and Financial Literacy (#164)
Delaware Suite
An effective orientation is vitally important to ensure a successful transition occurs for new students. Understanding and experiencing the culture of the school, getting to know and meeting other students, and setting the stage for a proper beginning of the collegiate experience are all important factors that enable students to be successful. Where do financial literacy and financial aid fit into this experience? Hear and discuss the proper understanding of the information needed, of the support and resources available, and navigating the orientation experience—and how to complete it by incorporating financial aid information and financial literacy.
Moderator:
Ron Day, Director of Financial Aid, Kennesaw State University
Speakers:
Sarah E. Baumhoff, Associate Director of Financial Aid, Kennesaw State University
Jake Gross, Assistant Professor of Education and Director of Orientation and Transition Programs, Kennesaw State University
Ron Day, Director of Financial Aid, Kennesaw State University
College Ave Student Loans Session (#244)
Coolidge
This session will dispel misconceptions about private student loans and focus on helping schools understand the ins and outs of private credit and how private student loans work. Presenters will also discuss tools for students to become aware of credit and the importance of credit education as they progress through college.
Speakers:
Joe DePaulo, Chief Executive Officer, College Ave Student Loans
Ron Griffin, Director of Public Education, Experian

Managing Your Team (#168)
Wilson ABC
One of the most challenging issues you will face as director is managing people. This session will examine topics surrounding hiring, training, expectation setting, and using the team’s strengths to achieve office goals. Learn how to effectively motivate, monitor, and provide feedback on performance.
Speaker:
Karen Krause, Executive Director Financial Aid, Scholarships, & Veterans Affairs, University of Texas at Arlington

The Recipe for “Tried and True” Graduate Student Financial Literacy Programs (#165)
Thurgood Marshall West
A panel of graduate schools will share the ingredients of their up and running financial literacy programs which were developed specifically for a graduate student audience. Through discussing “the how” and “the who” of internal buy-in, the challenges and how they surmounted, and how each program is working so far, presenters will share what they have learned and best practices to date. They will explain how they defined their goals, prepared and implemented their delivery, and measured and tweaked their programs. The audience will leave with easily executed takeaways to put into practice immediately upon returning to campus.
Moderator:
Donna M. Miller, Associate Vice President of Business Development, iGrad
Speakers:
Jennifer Markham Hulvey, Director of Financial Aid, University of Virginia School of Law
Valeria Harris, Assistant Director of Financial Aid, Harvard Graduate School of Education
Charles Pruett, Assistant Dean for Financial Aid, Georgetown University Law Center

Affecting Practice and Policy With Financial Aid Research (#163)
Thurgood Marshall North
Although financial aid is among the most researched topics in higher education, there remains a disconnect between published scholarly research and the use of this research by financial aid practitioners. This session will focus on areas of research identified by practitioners as important but that remain understudied. Presenters will share results from a survey and conversations with financial aid practitioners regarding how they use research in their work. In addition, panelists will consider how extant lines of financial aid research can be better communicated and discuss the kinds of research that practitioners value.
Moderator:
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA
Speakers:
Jacob Gross, Assistant Professor, Department of Educational Leadership, Evaluation and Organizational Development, University of Louisville
Megan McClean Coval, Vice President, NASFAA
Don Heller, Dean, College of Education, Michigan State University

One Grant/One Loan: The Future of Federal Student Aid? (#162)
Virginia Suite
Fueled by reauthorization talk in Congress about moving to a “One Grant/One Loan” model, NASFAA in the fall of 2015 convened a One Grant/One Loan Task Force charged with examining potential implications of such a move and developing recommendations regarding this proposal. In this session, members of the task force will summarize their deliberations and explain the recommendations surfaced during their work period.
Moderator:
Karen McCarthy, Director of Policy Analysis, NASFAA
Speakers:
Karen McCarthy, Director of Policy Analysis, NASFAA
Stephen Payne, Federal Relations Associate, NASFAA
Angela Johnson, Executive Director, Financial Aid Administration, Cuyahoga Community College District Campus
Making the Most of Your Membership - Using NASFAA Tools (#167)
Maryland Suite
Learn how to make the most of NASFAA’s suite of tools and resources, including the all-new Compliance Engine, the Student Aid Index, the AskRegs Knowledgebase, the Standards of Excellence Review Program, and the NASFAA website.

Moderator:
Dana Kelly, Chief Training Officer, NASFAA

Speakers:
Carrie Ann Conrad, Director, Project Integration and Technology, NASFAA
Dana Kelly, Chief Training Officer, NASFAA
Mandy Sponholtz, SOE Review Program Administrator, NASFAA

Title IV Verification 2017-18 (#169)
Washington 1/2
This session will discuss verification requirements for 2017-18, including FAFSA data subject to verification, changes to verification tracking groups, and acceptable documentation.

Moderator:
Jack Edwards, Director of Financial Aid, Stanford University Graduate School of Business

Speakers:
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
Jeff Baker, Federal Student Aid, U.S. Department of Education

Common Origination and Disbursement (COD) Update (#170)
Washington 4
This session will provide information about the COD system, including system enhancements that have been implemented as a result of recent legislation. The session also will include an overview of enhancements and upcoming changes.

Moderator:
Bob Brew, Director of Administrative Services, Oregon Student Access Commission

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

Gainful Employment Update (#171)
Roosevelt 123
This session will provide information about Gainful Employment (GE) and the Data Challenges and Appeals Solution (DCAS). The first function of DCAS will allow institutions to submit requests for corrections and updates to the GE completer lists. In the future, DCAS also will be used by schools to submit challenges to draft GE debt-to-earnings rates.

Moderator:
Amy Hager, Director of Financial Aid, Moberly Area Community College

Speakers:
Cynthia Hammond, U.S. Department of Education
Greg Martin, U.S. Department of Education

2:45pm - 3:45pm
Prior-Prior Year From the Admission Perspective (#175)
Delaware Suite
Join us for an update from the National Association for College Admission Counseling (NACAC) on the discussion of Prior-Prior Year (PPY) implementation from the school counseling and college admission perspectives. The session will include a discussion of practical and ethical considerations for higher education administrators as PPY is brought online.

Moderator:
Sarah Friedman, Public Policy Coordinator, National Association for College Admission Counseling (NACAC)

Speakers:
Louis Hirsh, Chair, NACAC Admission Practices Committee, National Association for College Admission Counseling (NACAC)
Sarah Summerhill, Assistant Director of Admissions, National Association for College Admission Counseling (NACAC)
Entrance and Exit Counseling: Strategies to Get the Most Significant Results! (#179)

Wilson ABC

In this session a panel will address the challenges of loan counseling and provide solutions for presenting material in a much more impactful and engaging way than what has traditionally been available. With the goal of changing behaviors such as staying in school, borrowing responsibly and repaying in a timely manner, your entrance and exit counseling might need an overhaul. Best practices such as use of video, peer-to-peer methodologies and incorporating reinforcement of loan counseling throughout enrollment— not only as bookends—will be reviewed and you’ll leave with a few takeaways you can put into practice immediately upon returning to campus.

Moderator:
Donna M Miller, Associate Vice President of Business Development, iGrad

Speakers:
Donna M Miller, Associate Vice President of Business Development, iGrad
Christine Conway, Director, Student Financial Aid, University of Phoenix Central Administration
Heidy Santizo, Financial Awareness Program Manager, DeVry University, DeVry Education Group

Outcomes From the Task Force Examining the Lack of Graduate-Specific Data (#177)

Thurgood Marshall North

In addition to reviewing the outcomes of the Task Force Examining the Lack of Graduate-Specific Data, session presenters will review the process used for determining the data the graduate/professional community already has access to, the data the community would like to be collected, and the pros and cons of collecting and releasing graduate/professional specific data.

Moderator:
Stephen Payne, Federal Relations Associate, NASFAA

Speakers:
Emily Osborn, Director, Northwestern University Chicago Campus
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA
Tracy Hunt-White, Statistician, National Center for Education Statistics

Is Your Campus Ready for PPY? (#174)

Thurgood Marshall Southeast

Beginning in October 2016, prospective students will be able to submit their FAFSAs using information from an already completed tax return and could, consequently, have knowledge of financial aid eligibility earlier in the college admissions process. However, how early institutions will be able to take advantage of this change in the financial aid process will be largely dependent on interactions between the Department of Education and software developers as well as campus offices such as information technology, admissions, and financial aid. This session will provide recommendations on how to best position your institution for the move to Prior-Prior Year and the Early FAFSA.

Moderator:
Kristi Jovell, Director of Financial Aid, Champlain College

Speakers:
Samantha Veeder, Associate Dean for College Enrollment/ Director of Financial Aid, Syracuse University
Roberto Santizo, Enrollment Management Consultant, Scannell & Kurz, Inc.

Graduate/Professional School Recommendations for ED’s StudentAid.gov and StudentLoans.gov Websites (#173)

Thurgood Marshall West

The NASFAA Consumer Information & Law Student Indebtedness Task Force was convened in fall 2015 upon receiving a grant from Access Group. The task force was charged with providing the Department of Education (ED) with recommendations to more clearly focus on the needs of graduate/professional students on the StudentAid.gov and StudentLoans.gov websites. This session will be a lively discussion on how these ED websites could better meet the needs of graduate/professional school students.

Moderator:
Karen McCarthy, Director of Policy Analysis, NASFAA

Speakers:
Tracy L. Simmons, Assistant Dean of Admissions, Diversity Initiatives and Financial Aid, University of the Pacific, McGeorge School of Law
Cheryl Constantine, Director of Financial Aid, Boston University School of Law
Ursula Duran, Senior Associate Director, Fordham University
Only 3,650 More Days Until Retirement, But Who’s Counting?! (#178)

Virginia Suite

Our jobs have become increasingly more difficult and stressful. A typical day may entail dealing with personnel issues, meeting with angry or crying students, complicated processes with difficult to explain regulations, fewer dollars in your budget, increasing tuition, and reporting that doesn’t stop. And of course, you have all of the answers, but yet, no one appears to be listening! But with that said, you can still enjoy your job and feel proud about what you do. Hear from two incredibly fun and ‘seasoned’ professionals on how you can keep your head high and make work exceptional AND enjoyable.

Moderator:
Odette Franceskino, Director of Financial Aid, Quinnipiac University School of Law

Speakers:
Heather Boutell, Director, Financial Aid, Bellarmine University
Barbara Miller, Assistant Vice President of Financial Aid, Stevenson University

The Cost of Opportunity: Student Loans and Social Mobility (#176)

Maryland Suite

Higher education holds the promise of opportunity and social mobility. How we finance that education, however, makes a difference. Speakers in this session will make the argument that viewing education as a commodity acts to justify higher levels of debt and explore the proposal that we decenter the “student as consumer” metaphor, and instead focus education financing law and policy on keeping students socially mobile in an uncertain future.

Moderator:
Eileen O’Leary, Assistant Vice President Student Financial Assistance, Stonehill College

Speaker:
Daniela Kraiem, Associate Director, Women and the Law Program, Washington College of Law, American University

Direct Loans: Public Service Loan Forgiveness Program (#180)

Roosevelt 123

Enacted in 2007, the Public Service Loan Forgiveness Program encourages individuals to enter and work full-time in public service jobs. This session includes an overview of the program, eligibility requirements, resources schools can utilize to promote awareness of the program, and information regarding how qualifying payments are tracked.

Moderator:
Dean Obenauer, Assistant Director of Financial Aid, Creighton University

Speaker:
Ian Foss, Program Specialist, U.S. Department of Education

Cash Management Regulations Overview (#181)

Washington 1/2

This session will provide guidance about the final regulations that changed the requirements for institutions that partner with banks and servicers to offer debit cards, prepaid cards, student IDs with financial account capabilities, and similar products. Presenters will provide an overview of why these regulatory changes were necessary and will explain the new requirements for institutions including: limitations on fees, disclosure requirements, and limitations on sharing information. Presenters also will provide information about other changes, including confirming students’ eligibility and paying credit balances before seeking reimbursement from the Department of Education, among other topics.

Moderator:
Jeff Scofield, Director of Student Financial Services, Seattle University

Speakers:
Nathan Arnold, Office of Postsecondary Education, U.S. Department of Education
John Kolotos, Program Specialist, Student Financial Assistance Program Development Division, U.S. Department of Education

CampusLogic - Boost Student Engagement in the Aid Office (#182)

Coolidge

It’s no secret that students struggle to get through financial aid. Why? Paperwork, fax machines, and snail mail are completely foreign to them. Your students live on their phones – they’re banking online, booking travel online, even taking classes online. They want the same experience from financial aid. That’s where CampusLogic comes in, making the financial aid experience easy, mobile, and personalized. We’re talking mobile document upload, e-signature, text communication, multi-media award letters. Come learn how you can transform financial aid to provide the best (hands down) student experience to get more students through the door and into the classroom.
4:00pm - 5:00pm

Comparing Income-Driven Repayment Plans for Graduate and Professional Borrowers (#187)

_Holy Income-Driven Repayment Plans, Batman!_ Income-driven repayment plans provide affordable payments—especially for those with high student loan balances, like graduate and professional borrowers—but how should a student loan borrower choose between the many available plans? What are the eligibility requirements? Should anyone choose the original income-contingent repayment (ICR) plan? Why is PAYE As You Earn (PAYE) better than income-based repayment (IBR) for “new borrowers”? Which borrowers can benefit from REPAYE? What about switching plans, interest capitalization, forgiveness and taxation? How many income-driven plans is too many? Won’t the rules be changing soon? This session will answer all these questions, and more!

**Moderator:** Rebekah Melville, Director of Financial Aid, Yale University School of Management

**Speakers:**
- Heather W. Jarvis, Principal, Heather Jarvis, Student Loan Expert LLC
- Charles Pruett, Assistant Dean for Financial Aid, Georgetown University Law Center
- David Sheridan, Director of Financial Aid, School of International & Public Affairs, Columbia University in the City of New York

Developing an Office Operational Calendar (#184)

_Holy Income-Driven Repayment Plans, Batman!_ Income-driven repayment plans provide affordable payments—especially for those with high student loan balances, like graduate and professional borrowers—but how should a student loan borrower choose between the many available plans? What are the eligibility requirements? Should anyone choose the original income-contingent repayment (ICR) plan? Why is PAYE As You Earn (PAYE) better than income-based repayment (IBR) for “new borrowers”? Which borrowers can benefit from REPAYE? What about switching plans, interest capitalization, forgiveness and taxation? How many income-driven plans is too many? Won’t the rules be changing soon? This session will answer all these questions, and more!

**Moderator:** Rebekah Melville, Director of Financial Aid, Yale University School of Management

**Speakers:**
- Heather W. Jarvis, Principal, Heather Jarvis, Student Loan Expert LLC
- Charles Pruett, Assistant Dean for Financial Aid, Georgetown University Law Center
- David Sheridan, Director of Financial Aid, School of International & Public Affairs, Columbia University in the City of New York

How to Solve Your Student Engagement Dilemma (#186)

_Wilson ABC_

How many times have you put on a program only to have a handful of students show up? Sometimes, in order to solve a problem, you need to turn to “the problem” for help. Northeastern’s Center for Financial Independence (CFI) is a student-led, student-driven initiative that has solved the student engagement problem. Join us to hear directly from Northeastern University presenters about the creation and work that went into building the CFI and its student-centered model.

**Moderator:** James Slattery, Senior Director, Northeastern University

**Speakers:**
- Anthony R. Erwin, Dean of Student Financial Services, Northeastern University
- Anya Ilkys, Director, Student Financial Literacy, Northeastern University

Next Steps in FAFSA Simplification (#183)

_Thurgood Marshall North_

With the upcoming implementation of prior-prior year (PPY) income data on the FAFSA form, what else can we do to further simplify the FAFSA while still obtaining information necessary to award state and institutional aid? During 2015-16, the National College Access Network (NCAN) convened stakeholders to review multiple proposals to develop a new FAFSA and federal aid methodology. Join this forward-thinking session to learn about the proposals, share your thoughts, and hear the latest on FAFSA reform in Washington.

**Moderator:** Kim Cook, Executive Director, National College Access Network

**Speakers:**
- Megan McClean Coval, Vice President, NASFAA
- Carrie Warick, Director of Partnerships and Policy, National College Access Network
Creating an Introvert-Friendly Workplace (#185)

Maryland Suite

Approximately one-third of the United States population is considered introverted. Susan Cain, author of “Quiet: The Power of Introverts in a World that Can’t Stop Talking,” argues that today’s society dramatically undervalues introverts. They are the ones who prefer listening to speaking; who innovate and create but dislike self-promotion; who favor working on their own over working in teams. This session will explore myths about introversion and help participants examine their workplace culture to respect this quiet but mighty member of the team. Come prepared to participate—unless you would rather just listen —and there isn’t anything wrong with that.

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

Speakers:
Lisa Blazer, Senior Associate Vice President for Student Affairs, University of Texas at San Antonio
Sharon Kienow, Director of Financial Aid, Northern State University
Brenda Hicks, Director of Financial Aid, Southwestern College

Sharing Financial Aid Application Information and FERPA (#188)

Virginia Suite

The 2008 reauthorization of the Higher Education Act added a statutory prohibition against sharing FAFSA data for any purpose other than the application, award, and administration of financial aid. What does that mean exactly and what are the implications for schools? How does this statutory text differ from FERPA requirements? This session will review the various laws, discuss related precedent outside the law, and review best practices for institutions.

Moderator:
Mary Sommers, Director of Financial Aid, University of Nebraska at Kearney

Speakers:
Karen McCarthy, Director of Policy Analysis, NASFAA
Rebecca Flake, Higher Education Services Senior Advisor, Cooley LLP

HEA Preview With Congressional Staff (#189)

Delaware Suite

Higher education reauthorization is right around the corner and congressional staff are busy working behind the scenes to prepare. Featuring congressional staff from both parties in the House and Senate, this session will provide an insider view of the latest conversations, discussions, and proposals related to reauthorization, and share thoughts and predictions on the timeline for getting a final bill. In addition, panelists will comment on the progress of some of NASFAA’s key proposals.

Moderator:
Justin Draeger, President, NASFAA

Speakers:
Jenny Prescott, Professional Staff Member, U.S. Congress Staff
Bryce McKidben, Minority, U.S. Senate
Robert Moran, Majority, U.S. Senate
Tim Lynch, Senior Counsel, House Committee on Oversight and Government Reform, U.S. Congress
Katherine Valle, Minority Staff, House Committee on Education & the Workforce, U.S. Congress

Federal Cohort Default Rate: Default Management Plan Requirements and Tools (#190)

Roosevelt 123

This session will help schools to understand the mechanics of creating an effective and robust default prevention plan using available NSLDS reporting tools. A good default prevention plan outlines a comprehensive vision of how to approach default while fostering a campus culture that champions the student borrower. To jumpstart plan development, schools should closely review their NSLDS School Portfolio and Delinquent Borrower Reports. Our session will discuss in detail the reporting options before a discussion about plan development. Join us and let’s talk default prevention!

Moderator:
Vickie Crupper, Associate Director, University of Michigan

Speakers:
Cynthia Battle, U.S. Department of Education
Title IV Third-Party Servicers (#191)
Washington 1/2
This session will review the guidance provided to institutions that contract with third-party servicers to administer aspects of an institution’s participation in the Title IV programs. Presenters will explore the definition of a third-party servicer, the responsibilities of an institution in working with a third-party servicer, and reporting requirements related to third-party servicers.
Moderator:
JoAnn Lorraine Ross, Director for Student Financial Assistance, West Virginia State University
Speakers:
Angela Beam, Institutional Review Specialist, U.S. Department of Education
Denise Morelli, U.S. Department of Education
Scott Filter, U.S. Department of Education

FSA’s Integrated Partner Management Solution (#192)
Washington 4
Integrated Partner Management (Ipm)—make sure you’re ready! In this session, you will learn how your institution can prepare to use Ipm and how the system will improve the application process for eligibility, recertification, updates, and submission of your institution’s annual Financial Statements and Compliance Audits.
Moderator:
Justin Jaramillo, Interim Director-Financial Aid & Scholarships Office, University of Colorado Denver
Speaker:
Diahann Greene, Training Officer, U.S. Department of Education

Tuesday
8:30am - 9:30am
Veterans’ Re-Entry Experience and Financial Aid’s Role (#202)
Virginia Suite
The best way to honor a veteran is to ensure that his or her experience at your institution is a positive one. From the “culture shock” of joining higher education to struggling with PTSD, financial aid administrators need to understand the perspective of the veteran student. This session will explore best practices in financial aid and will explore the re-entry perspective of both male and female veterans.
Moderator:
Michael OxGrady, Client Relations, Financial Aid Services
Speakers:
Billy Davis, Associate Director of Financial Aid, Communications and Enrollment Management, Northern Virginia Community College
SGT. Matisa Schraven, MOHELAA

Women and Men in Leadership: Developing YOUR Identity as a Successful Leader (#203)
Washington 4
As you progress in your career, your “leadership identity” will grow and evolve. This is true for both men and women. However, integrating leadership into one’s identity can be particularly challenging for women who often must work to establish credibility in organizations where the sense of what “effective leadership” looks like may be more male-oriented. Join your colleagues—both women and men—for an open, engaging discussion about leadership, as well as embracing the connection between inclusiveness and success. Presenters will discuss ways you can recognize unintended gender-bias, develop your leadership identity, and work collaboratively to encourage one another as aspiring leaders.
Moderator:
Lisa Blazer, Senior Associate Vice President for Student Affairs, University of Texas at San Antonio
Speakers:
Kevin Jensen, Associate Vice President and Chief Enrollment Management Officer, SUNY College At Oneonta
Lisa Blazer, Senior Associate Vice President for Student Affairs, University of Texas at San Antonio
Christina Roarke, Executive Director of Financial Aid, Excelsior College
In the Zone: Creating a Compliance Environment in the Financial Aid Office (#198)

Thurgood Marshall Southeast

In today’s complex regulatory environment, many institutions are choosing to expand their financial aid staff by adding a position focused on compliance. However, adding staff is only the first step in fostering a compliance environment. In this session, presenters will share their strategies for creating and fostering a compliance environment on their campuses.

Moderator:
Jennifer Martin, Director of University Financial Aid Compliance, Johns Hopkins University

Speakers:
Jennifer Martin, Director of University Financial Aid Compliance, Johns Hopkins University
Terri Elizabeth LeGrand, Associate Director, Wake Forest University

Best Practices for Recruitment, Admission and Retention of DREAMers (#197)

Delaware Suite

Before the state of Colorado passed Senate Bill 13-033, the ASSET Bill, Colorado State University (CSU) administration was mostly unaware that undocumented students were attending the institution. Since the law allows DREAMers to attend public institutions in Colorado at the resident tuition rate, the university has seen a dramatic shift both in interest in attending CSU and actual enrollment. This session will detail how CSU followed a best-practices approach to recruiting, awarding, enrolling, and supporting undocumented students on their quest of obtaining a higher education.

Moderator:
Joan D. Bailey, Associate Director, University of South Florida

Speakers:
Sylvia Martinez, Coordinator, Student Access, Colorado State University
Joseph Donlay, Associate Director, Operations, Colorado State University

Tuition Discounting: Results From the 2015 NACUBO Tuition Discounting Survey (#201)

Thurgood Marshall North

Many four-year private nonprofit colleges and universities use various institutional aid strategies to attract and retain undergraduates who are unable—or unwilling—to pay the full tuition and fee price. The National Association of College & University Business Officers’ (NACUBO) annual Tuition Discounting Study (TDS) measures institution- and student-level tuition discount rates and other indicators of institutional grant awards to first-time, full-time freshmen and all undergraduates who attend private non-profit colleges and universities. This presentation will provide an overview of the 2015 TDS, which reports discounting rates during the 2014-15 academic year as of the fall 2014, and preliminary estimates for 2015-16.

Moderator:
Ken E. Redd, Director, Research and Policy Analysis, National Association of College & University Business Officers (NACUBO)

Speakers:
Ken E. Redd, Director, Research and Policy Analysis, National Association of College & University Business Officers (NACUBO)
Kathleen Dawley, Principal, Hardwick Day, a division of Royall & Company
Mark L. Lindenmeyer, Assistant Vice President of Enrollment Management & Director of Financial Aid, Loyola University Maryland

Restructuring Institutional Financial Aid Programs Revisited (#200)

Wilson ABC

Three years ago at the NASFAA conference in Las Vegas, NV, University of Oregon representatives presented their plan to restructure the school’s merit- and need-based financial aid programs. Presenters talked about how the decisions were made, the data analysis that was done, and the resulting new programs. In this session, presenters from the university will return to update attendees on the results of the restructured merit- and need-based programs, both anecdotally and using data, talk about what was learned along the way, and plans moving forward.

Moderator:
Jacqueline Kennedy-Fletcher, Director Office of Student Financial Assistance, Indiana University

Speakers:
James Brooks, Assistant Vice President Enrollment Management & Director of Financial Aid & Scholarships, University of Oregon
Jonathan Jacobs, Director of Enrollment Management Research, University of Oregon
Perspectives: Minorities in Leadership (#204)

Maryland Suite

The United States has spent millions of dollars and countless hours on diversity initiatives and inclusion programs. What is the result? In February 2014, *Fortune* reported that only 4 percent of the total Fortune 500 CEOs at that time were minorities defined as African-American, Asian or Latino-American. Join us for this session, where a panel of leaders will describe what it means to be a minority in a leadership position in the field of financial aid.

**Moderator:**
Wayne Harewood, Chief Financial Aid Administrator, Kingsborough Community College

**Speakers:**
Patricia Scott, Assistant Vice President Student Financial Assistance, University of Maryland, Baltimore
Brenda M. Brown, Director of Strategic Initiatives, University of Miami
Wayne Harewood, Chief Financial Aid Administrator, Kingsborough Community College
Tami Sato, Senior Director of Enrollment Management and Financial Aid, Marshall B. Ketchum University

Federal Town Hall (#205)

Washington 1/2

Presenters from the U.S. Department of Education will respond to questions and comments from the audience.

**Moderator:**
James White, Dean, Student Financial Services, Gonzaga University

**Speakers:**
Jeff Baker, Federal Student Aid, U.S. Department of Education
Carney McCullough, Director, Policy Development Group, U.S. Department of Education
Susan O’Flaherty, U.S. Department of Education
Jeff Appel, U.S. Department of Education
Misty Parkinson, U.S. Department of Education
Ron Bennett, FSA, Business Operations, Acting Director, NSLDS, U.S. Department of Education

College Board – CSS/Financial Aid PROFILE: A Streamlined Solution for Graduate, Professional and International Aid Applications (#206)

Coolidge

Join College Board staff and aid practitioners to discuss best practices for delivering financial aid to special populations. In this session, presenters will cover how the PROFILE can help you make informed decisions and distribute limited institutional funds to targeted populations. The presentation will also highlight how campus colleagues are using PROFILE to meet strategic enrollment initiatives for graduate, professional, and international students.

**Moderator:**
Katrina Delgrosso, Director, Financial Aid Solutions, The College Board

**Speakers:**
Julia Padgett, Director, Financial Aid Solutions, The College Board
Terra Jones-Sims, Director of Student Financial Aid Services, Johns Hopkins University School of Medicine
Brent Tener, Director, Vanderbilt University

Findings From NASFAA’s Survey of College Presidents (#199)

Roosevelt 123

This session will present the findings from recent research on college and university presidents’ perceptions of the financial aid office (FAO) and its administrators. Using data collected during an in-person focus group and a national online survey, both administered in early 2016, panelists will discuss in-depth the understanding and satisfaction level presidents have with the FAO and financial aid administrators as well as what information presidents would like to receive related to financial aid and how they would like to receive it. There will be additional discussion on next steps for NASFAA and our members.

**Moderator:**
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA

**Speakers:**
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA
Eileen O’Leary, Assistant Vice President Student Financial Assistance, Stonehill College
Karli Susi, Managing Consultant, McKinley Advisors
9:45am - 10:45am

**Portability of Financial Aid for International Programs: Opening the Door (#209)**

*Delaware Suite*

Internationalizing the college campus has been a hot topic these past few years, with more institutions putting an emphasis on increasing for-credit study, internship or research abroad participation. However, institutions struggle to find ways to cover the costs of these experiences while still adhering to regulations. This panel presentation and discussion will focus on study abroad models, cost of attendance procedures, consortium and contractual agreements, regulations and policy implications, scholarship opportunities, alternative funding sources, and best practices, as well as creative ways of building connections in order to stay informed about policies and procedures to better support students who study abroad.

**Moderator:**  
Michele Arellano, Associate Director, University of Kansas

**Speakers:**  
Michele Arellano, Associate Director, University of Kansas  
Nicholas W. Prewett, Director of Financial Aid, University of Missouri  
Mathew Sagayaga, Financial Aid Counselor, Portland State University

**Negotiated Rulemaking: Being at the Table to Write Regulations (#211)**

*Thurgood Marshall Southeast*

Have you ever wondered how financial aid regulations are written? Do you ever wish you could have a voice in the process? Well, guess what? You can! Attend this session to hear from two financial aid administrators who’ve been involved in Negotiated Rulemaking. Presenters will share their personal experiences in tackling Gainful Employment and REPAYE, discuss the benefits and commitments involved, and share other ways financial aid administrators can have a seat at the table rather than ending up on the menu.

**Moderator:**  
Richard Heath, Director, Student Financial Services, Anne Arundel Community College

**Speakers:**  
Helen Faith, Director of Financial Aid, Lane Community College  
Kevin Jensen, Associate Vice President and Chief Enrollment Management Officer, SUNY College At Oneonta

**Federal Student Aid and Reauthorizing the Higher Education Act (#207)**

*Thurgood Marshall North*

In anticipation of the upcoming Higher Education Act reauthorization, this panel offers a "state of affairs" on federal student financial aid research and policy. Policy experts and researchers will engage in a dialogue focused on: upcoming policy changes, historical context to these changes, and the role of research in shaping future policy changes. Panelists will briefly outline the current state of theory/research on their topic and introduce the most important areas of policy change that researchers can help inform. Attendees will gain knowledge on the subject while engaging with panelists on policy areas in need of additional scholarship.

**Moderator:**  
Jacob Gross, Assistant Professor, Department of Educational Leadership, Evaluation and Organizational Development, University of Louisville

**Speakers:**  
Nicholas Hillman, Assistant Professor, Educational Leadership & Policy Analysis, University of Wisconsin - Madison  
Dan Madzelan, Associate Vice President, American Council On Education  
Megan McClean Coval, Vice President, NASFAA  
Sandy Baum, The George Washington University  
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA

**Exploring Data Resources for Graduate and Professional Education (#208)**

*Thurgood Marshall West*

Policymakers are paying increased attention to improving the data and information available to undergraduates to help inform their decisions about where to attend school, the costs, and their likely debt and employment outcomes. Unfortunately, similar data and information for graduate and professional students is even more difficult to find, despite the larger financial investment required for their programs. In this session, presenters will highlight resources available for graduate/professional financial aid counselors and students to use, and discuss policy changes that could make such information more broadly available in the future.

**Speakers:**  
Elise Miller, Vice President - Research Programs, Access Group  
Tiffane Cochran, Director of Research, Access Group

**Leadership & Communication**  
**Compliance**  
**Regulatory Implementation**  
**Enrollment & Retention (Admissions)**  
**Research**  
**Graduate/Professional Issues**
Creating an LGBT-Friendly Workplace (#210)
Washington 4

According to Diversity MBA magazine, the companies best positioned to outperform their competitors are those that consistently recruit and retain top talent. With an estimated 7 million lesbian, gay, bisexual, and transgender (LGBT) employees in America’s private sector, employers that are slow to create LGBT-friendly workplaces risk missing out on a substantial pool of skilled talent. Moreover, losing and replacing the more than 2 million American workers who leave jobs due to unfair treatment and discrimination costs employers an estimated $64 billion each year. Is your workplace LGBT friendly? How can you make sure it is?

Moderator:  
James Brooks, Assistant Vice President Enrollment Management & Director of Financial Aid & Scholarships, University of Oregon

Speakers:  
Meredith Kuczik, Associate Director for Scholarships, Northeastern University
Matt Bruno, Coordinator of LGBTQ Programming, American University

Competency-Based Education for Millennials and Beyond (#212)
Wilson ABC

Learn about the experiences and outcomes of Western Governors University’s (WGU) partnership with numerous community colleges’ implementation of competency-based education (CBE) and how to utilize cost models for effective CBE program development. The session will also provide an overview of best practices for identifying and tracking educational activities of students using electronic learning materials and how CBE programs could reduce student loan debt for the millennial generation and beyond.

Moderator:  
Pamela W. Fowler, Executive Director, Office of Financial Aid, University of Michigan

Speakers:  
Robert Collins, Vice President of Financial Aid, Western Governors University
Sally M. Johnstone, President, National Center for Higher Education Management Systems

Emergency Aid: Small Grants. Right Time. Big Impact. (#213)
Maryland Suite

Picture this: Your financial aid office gets a call or email from your campus foundation office with news of a $100,000 gift to help students at risk of dropping out, and they want to partner with you to implement an emergency aid program. Join a discussion with the leading researcher in emergency aid and innovative financial assistance, Dr. Sara Goldrick-Rab, and Scholarship America on best practices for emergency aid programs, and how small-dollar grants of less than $500 delivered in less than a week can ensure 95 percent or more of your students receiving emergency aid finish their term.

Speakers:  
Sara Goldrick-Rab, Associate Professor of Educational Policy Studies & Sociology, University of Wisconsin - Madison
Despina Costopoulos, Director of Community Engagement and Partnerships, Scholarship America

House Oversight Update (#214)
Virginia Suite

Over the past year, the House Committee on Oversight and Government Reform and the House Committee on Education and the Workforce have examined the effectiveness, appropriateness, and responsiveness of the U.S. Department of Education’s Office of Federal Student Aid (FSA). Efforts to assess FSA have been done through congressional inquiries, surveys, and hearings. This session will feature congressional staff who have worked closely on these issues. They will share their respective committees’ findings, insights, and recommendations based on the investigations they’ve conducted. They will also provide comment on how their work could ultimately impact the financial aid office.

Moderator:  
Justin Draeger, President, NASFAA

Speakers:  
Katie Bailey, Staff Member, U.S. Congress
Jenny Prescott, Professional Staff Member, U.S. Congress Staff

The Federal Perkins Loan Program Update (#215)
Roosevelt 123

This session will provide a summary of the requirements for “grandfathering” student borrowers, an overview of the process used to end a school’s participation in the Federal Perkins Loan Program, and will review the process schools must use to assign loans to the Department of Education.

Moderator:  
Kay W. Soltis, Director of Financial Aid, Pacific Lutheran University

Speakers:  
Brian Smith, U.S. Department of Education
Greg Gerrans, U.S. Department of Education
Tamy L. Garofano, Program Specialist, Policy Liaison and Implementation, U.S. Department of Education
The FSA ID - Resources for Assisting Students, Parents, and Borrowers (#128)

Washington 1/2

This session will discuss how to create an FSA ID and explain where it can be used. The session also will cover how to use the self-service feature for common issues, such as locked accounts and forgotten username and passwords; will address common user errors associated with the FSA ID; and will provide information about resources for financial aid administrators and counselors.

Moderator:
Sandra Neel, Executive Director of Financial Aid, University of Louisville

Speakers:
Catherine Metcalf, U.S. Department of Education
Edward Pacchetti, U.S. Department of Education

11:00am - 12:00pm

Best Practices for Schools That Share a Student (#218)

Thurgood Marshall Southeast

From application for admission to beyond graduation a student/applicant may have interactions with a number of different schools. How can we reduce potential problems for the student (and for us!) or resolve them most effectively? NSLDS transfer monitoring, concurrent enrollment, consortium agreements, pending disbursements, professional judgment, transfer credits, Pell LEU, Unusual Enrollment History, Subsidized Usage Limit Applies (SULA) and more all need the exchange of information between institutions. How do we best use the federal systems and procedures required or recommended and how do we improve what we report and what we receive?

Moderator:
Brian Lemma, Associate Director, Georgetown University

Speakers:
Allene Curto, Associate Director of Financial Aid, Springfield College
Lillian Rodriguez, Assistant Director, Springfield College

Prior to PPY (#217)

Thurgood Marshall North

About a month before the Department of Education (ED) announced the use of prior-prior year (PPY) income data, Lawrence University had already decided to use PPY in 2016-17 for the awarding of institutional aid to incoming students. In this session, the Lawrence University financial aid staff will share the outcomes of their experience in using PPY, including the timing of receiving documents and making awards, how PPY data in Institutional Methodology (IM) compared with the prior year data in Federal Methodology (FM), and the impact of PPY on professional judgments.

Moderator:
David Tolman, Instructional Content Specialist, NASFAA

Speakers:
Sara Beth Holman, Director of Financial Aid, Lawrence University
Ryan Gebler, Associate Director of Financial Aid, Lawrence University

Financial Wellness: Student Impact Is a Collaborative Effort (#220)

Wilson ABC

This session will serve as a gateway for individuals to better understand collegiate financial wellness and the role that it plays with financial aid. An overview of current trends will be presented, including those that are campus-based and financial aid-based. Best practices for campus-wide collaboration will be outlined and an overview of how to start a program will be provided for attendees. The session will give attendees a good understanding of best practices, an overview of research related to student finances and target populations that can be identified, campus partners to identify and initial steps to take.

Moderator:
Dana Kelly, Chief Training Officer,

Speakers:
Bryan Ashton, Assistant Director, The Ohio State University
Philip Schuman, Director of Financial Literacy, Indiana University - University Student Services and Systems

A New Definition for College Affordability - Exploring the Implications of Lumina’s “Rule of 10” Benchmark (#221)

Maryland Suite

Lumina Foundation has proposed a student-centered model of affordability that begins with what students can reasonably contribute, and then suggests a system be built around their needs. Their resulting Rule of 10 proposes that college is affordable if students pay no more than the savings generated through 10 percent of discretionary income for 10 years as well as the earnings from working 10 hours a week while in school. This session will examine the contributions expected under the Rule of 10 compared to the currently used expected family contribution (EFC), as well as discuss the type and scope of policy interventions necessary.

Moderator:
Jesse O’Connell, Strategy Officer, Lumina Foundation for Education

Speakers:
Zakiya Smith, Strategy Director, Lumina Foundation for Education
Elizabeth Akers, Fellow, Center on Children and Families, Brookings Institution
Mark P. Huelsman, Senior Policy Analyst, Demos

College Ave Student Loans Session (#244)

Coolidge

This session will dispel misconceptions about private student loans and focus on helping schools understand the ins and outs of private credit and how private student loans work. Presenters will also discuss tools for students to become aware of credit and the importance of credit education as they progress through college.

Speakers:
Joe DePaulo, Chief Executive Officer, College Ave Student Loans
Ron Griffin, Director of Public Education, Experian
What’s New with Regulatory Burden Relief? (#222)

Delaware Suite

In January 2015, NASFAA conducted a survey that polled financial aid administrators on the amount of administrative burden they experience. The findings indicate that students attending institutions from all higher education sectors are likely experiencing reduced access to financial aid office services, largely due to a prolonged increase in administrative burden and an environment characterized by limited operating resources. This panel will discuss work that’s being done at the federal level to reduce administrative burden, particularly in the context of the upcoming reauthorization of the higher education act.

Moderator:
Megan McClean Coval, Vice President, NASFAA

Speakers:
Terry Hartle, Senior Vice President, Division of Government and Public Affairs, American Council On Education
Andrew LaCasse, Education Policy Advisor, U.S. Congress
Bryce McKibben, Minority, Association of Community College Trustees
Benjamin Miller, Assistant Director, The University of North Carolina at Charlotte

College Promise Campaign: Investing in America’s Future (#223)

Virginia Suite

On September 9, 2015, the College Promise Campaign was launched. Designed to build widespread awareness, support and evidence, the campaign is completing its first year of a three-year plan to make a college education free for students, starting with community colleges. The campaign’s initial goal is for students to make active progress to complete a one-year certificate, a two-year degree and/or university transfer without assuming burdensome debt. To date, more than 130 College Promise programs have evolved in local communities and states across our nation. This session will address the importance of this initiative, its challenges and opportunities.

Moderator:
Justin Draeger, President, NASFAA

Speakers:
Martha Kanter, Director, America’s College Promise
Michael Nettles, Senior Vice President, Policy Evaluation and Research, ETS
Andrea Levere, President & CEO, Corporation for Enterprise Development

Gainful Employment Update (#224)

Washington 1/2

This session will provide information about Gainful Employment (GE) and the Data Challenges and Appeals Solution (DCAS). The first function of DCAS will allow institutions to submit requests for corrections and updates to the GE completer lists. In the future, DCAS also will be used by schools to submit challenges to draft GE debt-to-earnings rates.

Moderator:
Scott Cline, Director of Financial Aid, California College of the Arts

Speakers:
Cynthia Hammond, U.S. Department of Education
Greg Martin, U.S. Department of Education

Early FAFSA® and Use of Prior-Prior Year Income (#225)

Roosevelt 123

This session will provide a high-level overview of the objectives, impacts, and planned communications that will result from early implementation of the FAFSA and the move to using Prior-Prior Year (PPY) income data. The Department of Education’s Office of Federal Student Aid welcomes financial aid community members to participate in this interactive session and looks forward to hearing your thoughts.

Moderator:
James White, Dean, Student Financial Services, Gonzaga University

Speakers:
Misty Parkinson, U.S. Department of Education
Wendy Bhagat, U.S. Department of Education
Edward Pacchetti, U.S. Department of Education

Cybersecurity Requirements for Institutions of Higher Education (#226)

Washington 4

This presentation will discuss The Gramm-Leach Bliley Act (GLBA) and identify the privacy and security requirements for colleges and universities under GLBA. The GLBA is part of Federal Student Aid’s Program Participation Agreement (PPA), which requires the Institution of Higher Education (IHE) to ensure the security and confidentiality of students’ personal information. We will also discuss the new National Institute of Standards and Technology federal requirements.

Speaker:
Linda Wilbanks, Director, IT Risk Management, U.S. Department of Education
Perkins Loans and Graduate/Professional Students: Rules and School Practices (#219)

Thurgood Marshall West

Congress extended the Perkins Loan Program through September 30, 2017, with significant changes affecting graduate/professional students. During this session, learn about modified Perkins Loan awarding criteria, continued eligibility, and additional required disclosures for graduate and professional students, and learn how your graduate/professional aid colleagues are implementing the changes at their institutions.

_Moderator:_

Mandy Sponholtz, SOE Review Program Administrator, NASFAA

_Speakers:_

Herbert Revill, Director of Financial Aid & Resident Debt Management Advisor, University of Rochester School of Medicine and Dentistry
Karen Hauser, Associate Director, Vanderbilt University
Karen McCarthy, Director of Policy Analysis, NASFAA

CampusLogic - Get Insights From Your Financial Aid Data Instantly (#227)

Coolidge

Today’s schools are focused on using relevant data to drive student success. But how often does management turn to you for answers about financial aid data that you just don’t have? We know how hard it is to access financial aid data, especially when reporting requests fall into the long backlog of items for IT to deliver. That’s why we created CampusMetrics – easy business intelligence just for financial aid. Learn how to get insights from your financial aid data instantly, easily see trends, and query to answer specific questions. You have data, now you have answers.

2:30pm - 3:30pm

Financial Aid in a Hashtag World (#229)

Wilson ABC

Students—and their parents—are using social media to connect with friends, family, campuses, businesses, and even the Office of Federal Student Aid (FSA). With such an array of social media choices, you want to make sure you understand what networks students use, how each network works, and what opportunities and challenges social media presents for the financial aid office. After a review of the social media landscape, panelists representing aid offices, FSA, and a servicer will discuss how they’ve integrated social media into their communication strategies.

_Moderator:_

Keyimani L. Alford, Training Specialist, Great Lakes Higher Education Corporation & Affiliates

_Speakers:_

Liz Gross, Social Media & Market Research Strategist, Great Lakes Higher Education Corporation & Affiliates
Chandra Owen, OFA Training Coordinator, Michigan State University
Sylvia Martinez, Coordinator, Student Access, Colorado State University
Nicole Callahan, TBD, Colorado State University

What Financial Aid Officers Should Know About Community College HEA Reauthorization Priorities (#231)

Washington 4

You don’t have to be told that federal financial aid is important to community college students. For example, community college students receive more than one-third of total Pell Grant funds, and one-third of all full-time students now take out federal loans. In this session, representatives from the American Association of Community Colleges (AACC), as well as government relations representatives of two community colleges, will provide their perspectives on the community college HEA reauthorization agenda—what it is, and how it is being received on Capitol Hill.

_Moderator:_

Joan A. Zanders, Director of Financial Aid, Northern Virginia Community College

_Speakers:_

David Baime, Vice President for Government Relations, American Association of Community Colleges (AACC)
Tim Sheehan, Vice President, Government and Community Relations, Salt Lake Community College
Integrating Public Benefits Into Campus Services and Financial Aid to Facilitate College Completion (#230)

Delaware Suite

While community college tuition and fees are relatively low, these costs represent only a small portion of the cost of attendance, and students are left with thousands of dollars of unmet need. Since 2012, seven community colleges in six states developed and implemented sustainable models to increase students’ financial stability by connecting more students to public benefits. Learn how two community colleges have leveraged financial aid data, resources, and technology to expand financial options to support student success. This session will focus on how the presenters’ deepened understanding of students’ financial challenges have forged institutional change to further the completion agenda.

Moderator:
Angela Johnson, Executive Director, Financial Aid Administration, Cuyahoga Community College District Campus

Speakers:
Angela Johnson, Executive Director, Financial Aid Administration, Cuyahoga Community College District Campus
Gail Baksh-Jarrett, Senior Director, Enrollment & Student Financial Services, La Guardia Community College
Amy Ellen Duke-Benfield, Senior Policy Analyst, Center for Law and Social Policy

NASFAA Quiz Show (#233)

Thurgood Marshall Southeast

Come and test your knowledge of the most asked regulatory questions of 2015/16. NASFAA receives hundreds of regulatory questions each month. This session takes a look at those asked most frequently. You’ll get a chance to compare your knowledge to those of your colleagues with lots of quiz questions. NASFAA presenters will review requirements and best practices related to these top issues and give attendees an opportunity to ask additional questions.

Moderator:
David L. Futrell, Knowledgebase/AskRegs Manager, NASFAA

Speaker:
Dana Kelly, Chief Training Officer, NASFAA

From Application to Graduation: Behavioral Science Insights For Building Student Success (#234)

Maryland Suite

Over the past two years, ideas42 has conducted more than a dozen projects applying insights from behavioral science to improve student financial and academic outcomes. With funding from the Bill & Melinda Gates Foundation, Lumina Foundation and others, ideas42 partnered with two- and four-year schools across the country to design low-cost solutions to problems related to financial aid and degree completion. Rooted in decades of academic research, behavioral science offers an accessible toolset to refine programs and policies to reflect enduring human tendencies. In this session, presenters will share lessons learned from our work, draw out system-level insights, and discuss current and future applications.

Moderator:
Ethan Fletcher, Vice President, ideas42

Speakers:
Ethan Fletcher, Vice President, ideas42
Dan Connolly, Senior Associate, ideas42

Results From NASFAA’s Grant to Examine Federal Work-Study (#236)

Thurgood Marshall North

This presentation will share the results of NASFAA research, made possible by a grant from the Bill & Melinda Gates Foundation, which studied current practices, challenges, and innovations that exist within institutions’ Federal Work-Study (FWS) programs. As part of the grant, NASFAA surveyed our members, National Student Employment Association (NSEA) members, and other key stakeholders to take an environmental scan of how FWS is currently being implemented on campus. After analyzing the results of this survey NASFAA brought together selected survey respondents for a one and one-half day in-person summit to delve further into the results.

Moderator:
Charlotte Etier, Senior Research Analyst & Grant Manager, NASFAA

Speakers:
Ann Wessman, Assistant Director/Scholarships & Work-Study, Iowa State University
Erin Knepler, Associate Director, Higher Education & Workforce, Public Agenda
Paula McLain, Coordinator of Student Employment, Northwest Missouri State University
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ASK QUESTIONS
Membership Benefits
NASFAA University
Standards of Excellence (SOE)

RECEIVE GIFTS
It’s a surprise, and it’s not a water bottle!
Town Hall: Planning NASFAA's Future (#235)

Virginia Suite

This year the NASFAA Board will develop a new strategic long-range plan for NASFAA that will touch on everything from professional development to public policy and advocacy. This is your chance to share with NASFAA leadership where NASFAA is succeeding or falling short, and share some of your priorities on how NASFAA can serve you better in the future.

Moderator:
Daniel Mann, Director of Financial Aid, University of Illinois at Urbana-Champaign

Speakers:
Justin Draeger, President, NASFAA
Eileen O'Leary, Assistant Vice President Student Financial Assistance, Stonehill College
Lisa Blazer, Senior Associate Vice President for Student Affairs, University of Texas at San Antonio
Daniel Mann, Director of Financial Aid, University of Illinois at Urbana-Champaign
Billie Jo Hamilton, Assistant Vice President, Enrollment Planning & Management, University of South Florida

Cash Management Regulations Overview (#237)

Washington 1/2

This session will provide guidance about the final regulations that changed the requirements for institutions that partner with banks and servicers to offer debit cards, prepaid cards, student IDs with financial account capabilities, and similar products. The presenters will provide an overview about why these regulatory changes were necessary and will explain the new requirements for institutions, including limitations on fees, disclosure requirements, and limitations on sharing information. The presenters also will provide information about other changes, including confirming students' eligibility, paying credit balances before seeking reimbursement from the Department of Education, including the cost of books and supplies in tuition, among other topics.

Moderator:
Cheryl Warmann, Director of Enrollment Services, Oakton Community College

Speakers:
Nathan Arnold, Office of Postsecondary Education, U.S. Department of Education
John Kolotos, Program Specialist, Student Financial Assistance Program Development Division, U.S. Department of Education

Resolving Citizen and Eligible Noncitizen Issues for Title IV Eligibility (#238)

Roosevelt 123

A student has to be a citizen or eligible noncitizen to receive federal student aid. This session will describe how the student's FAFSA information is matched with other agencies to determine citizenship status. The presenters also will describe immigration documents that you may have to collect to verify that the student meets citizenship requirements.

Moderator:
Barbara Miller, Assistant Vice President of Financial Aid, Stevenson University

Speakers:
Aaron Washington, Office of Postsecondary Education, U.S. Department of Education
Rene Tiongquico, Federal Student Aid Policy Liaison and Implementation, U.S. Department of Education

One University, Many Schools (#232)

Thurgood Marshall West

Graduate and professional staff at large universities often find themselves operating alone or even against a central financial aid office. Yale University's commitment to efficiency and customer service has led to the implementation of a financial aid professional development pathway. This program has trained professional school staff who maintain a reporting relationship with the central university while serving their specific student populations. Learn more about this program and how it has enabled staff to remain current on federal regulations, university policies, and effective student communications.

Moderator:
Jason Marrujo, Manager, Financial Aid and Scholarships, Oklahoma State University Center for Health Sciences

Speakers:
Caesar Storlazzi, University Director of Financial Aid, Yale University
David Blackmon, Yale School of Drama/Art Financial Aid Director, Yale University
Rebekah Melville, Director of Financial Aid, Yale University School of Management

Streamlining Scholarship Management With AcademicWorks (#243)

Coolidge

As students and parents struggle to pay for higher education, the need for scholarships is vital for colleges and universities to stay competitive when recruiting and retaining top talent. During this session we will explore how the AcademicWorks Scholarship Management Platform can revolutionize your entire scholarship process to improve student access to scholarships, enhance donor engagement, and maximize fund utilization.

Speaker:
Brandon Phipps, Chief Executive Officer, AcademicWorks
Wednesday
8:30am - 11:30am

**NASFAA University - Consumer Information (#241)**

*Salon 1 Marriott Ballroom*

This course is designed to explain all of the requirements and notifications needed, who should receive those notifications and how, as well as the required time frames. Participants will receive a voucher for the associated credential complimentary. Please arrive early Wednesday morning. Space is limited and seating will be first-come, first-served.

*Moderator:*
Michael Campbell, Financial Aid, American Business & Technology University

*Speakers:*
David L. Futrell, Knowledgebase/AskRegs Manager, NASFAA
Michael Kutcher, NASFAA University Instructor, NASFAA
Tiffany Gibbs, Compliance Products Manager, NASFAA

**NASFAA University - Administrative Capability (#242)**

*Maryland Suite*

This course focuses on administrative capability provisions and examines what a school should do to demonstrate its continued compliance as a participant in the Title IV Programs. In addition, this course is designed with the necessary tools, equipment, and subject matter expertise to assist you through understanding and applying administrative capability. Participants will receive a voucher for the associated credential test complimentary. Please arrive early Wednesday morning. Space is limited and seating will be first-come, first-served.

*Moderator:*
Lester McKenzie, Director of Financial Aid, Tennessee Technological University

*Speakers:*
David Tolman, Instructional Content Specialist, NASFAA
Brenda Murtha, NASFAA University Instructor, NASFAA
Eunice Powell, Regulatory Specialist, NASFAA
GET SOCIAL IN DC!

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

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Join in the National Conference Twitter conversation or just follow along using #NASFAATurns50. All tweets using this hashtag will be broadcast via a live feed at the conference, thanks to a sponsorship by CampusLogic. Please post your photos, favorite quotes, and session takeaways!
Introduction
On Tuesday, July 21, 2015, 2014-15 National Chair Eileen O’Leary opened the 2015 NASFAA Business Meeting and introduced the head table. She asked for a moment of silence to honor those financial aid colleagues who had passed away in the last year. She next thanked and recognized a series of groups, including conference exhibitors and contributors, the Conference Program Task Force and Local Arrangements Task Force, presenters and moderators, past presidents, and the NASFAA staff.

O’Leary then called for a motion to approve the minutes of the 2014 Annual Business Meeting. Neville Brown moved to approve the minutes and Pam Fowler seconded the motion. The motion was approved unanimously by voice vote. No new business was brought before the body.

Awards
Eileen O’Leary then presented the following awards:

• Next Big Idea Award: Mark Szymanoski, regulatory affairs manager, DeVry University

• Allan W. Purdy Distinguished Service Award:
  - Patricia Hurley, associate dean, Glendale Community College

• Meritorious Achievement, presented to an individual who has made either an important single contribution to the Association or the profession; or, significant multiple contributions:
  - Connie McCormick, NASFAA’s former chief training officer

• Robert P. Huff Golden Quill Award:
  - Jacob P.K. Gross, assistant professor at the University of Louisville
  - Stephen DesJardins, professor of education at the University of Michigan

• Regional Leadership Awards, for individuals exhibiting high integrity and character, creative leadership, and a commitment to professional development:
  - EASFAA – Larry Chambers, director of financial aid, Rensselaer Polytechnic Institute
  - MASFAA – Richard Shipman, director of financial aid, Michigan State University
  - RMASFAA – Sharon Kienow, financial aid director, Northern State University
  - SASFAA – Brad Barnett, senior associate director, James Madison University
  - SWASFAA – Liza Hopper, director of financial aid, National Park Community College
  - WASFAA – Sandra Guidry, awards/special projects coordinator, University of Nevada – Reno

• Gold Star Award:
  - Brad Burnett, University of Oklahoma, “Nine Things Every College Student Should Know About Money”
  - Honorable Mention – PASFAA, nextPAGE
  - Honorable Mention – University of California – Santa Barbara, Financial Aid Leadership Institute
Treasurer’s Report

NASFAA 2014-15 Treasurer Lori Vedder reported on NASFAA’s financial standing:

• NASFAA is projecting a June 30 fiscal year-end operating surplus. NASFAA’s audited financials are available on the NASFAA website.

• 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 $307,000. For 2015, $15,000 was disbursed from this fund to support NASFAA’s policy internship program. This year, the DME fund is supporting Angel Flores, 2015 policy intern.

• The Board of Directors recently approved a 2015-16 NASFAA operating budget totaling just over $7.6 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 fourth year in a row the audit was concluded without any findings, management letter, or recommendations.

Association Governance Chair’s Report

2014-15 Association Governance Committee Chair Ron Day reported that:

• 2,149 registrants for the 2015 conference

• 2,849 total members for the 2014-15 year (This year’s retention rate continues to outpace many other associations)

• 48 new NASFAA members in the 2014-15 year

• No changes to Articles and By-Laws during 2014-15

• NASFAA’s New Diversity Officer will be Jim Brooks

Outgoing Chair’s Remarks

Eileen O’Leary then gave a closing address to the membership. “At last year’s conference I told you I had four goals: expand opportunities for involvement in NASFAA, increase involvement for those who have not had the opportunity to be involved before, encourage us to get out of the weeds and to think bigger about financial aid issues, and finally, to prove someone from a small school can successfully serve as NASFAA national chair,” O’Leary said.

“I hope you agree that these goals have been achieved or at least have come a long way in the last year,” O’Leary added.

Among NASFAA’s accomplishments from the 2014-15 year, she listed NASFAA University’s credentialing system, the Student Aid Index, the newly formulated Ethics Commission chaired by Mary Sommers of the University of Nebraska – Kearney, and the efforts of the Board of Directors and the Association Governance Committee (AGC).

She then recognized and thanked 2012-13 NASFAA National Chair Ron Day for stepping back into the role of chair of the AGC when 2013-14 National Chair Craig Munier moved on to a position at the Department of Education.

“I am very grateful for the opportunity to have served our profession over the past year as national chair,” O’Leary told the crowd in closing. “It’s been a wonderful, enriching, thought-provoking, professionally stimulating experience and I wouldn’t have traded it for anything in the world.”

Chair O’Leary then passed the gavel to 2015-16 National Chair Dan Mann. “I am extremely pleased my first act as national chair is to recognize by colleague and friend Eileen O’Leary and to thank her for the outstanding job that she has done this past year leading our association,” Mann said. He then bestowed the Allan W. Purdy Distinguished Service Award upon Eileen O’Leary – making her the second Allan W. Purdy Award recipient for the year – asked for any new business and, hearing none, moved to adjourn the 2015 Business Meeting.

Respectfully submitted,

E. G. Maglione

Board Secretary, NASFAA
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<thead>
<tr>
<th>Company</th>
<th>Booth</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcademicWorks</td>
<td>418</td>
</tr>
<tr>
<td>Access Group</td>
<td>341</td>
</tr>
<tr>
<td>Allianz Global Assistance</td>
<td>336</td>
</tr>
<tr>
<td>American Student Assistance</td>
<td>308</td>
</tr>
<tr>
<td>Attain</td>
<td>313</td>
</tr>
<tr>
<td>Award Spring</td>
<td>411</td>
</tr>
<tr>
<td>Blackboard Transact</td>
<td>405</td>
</tr>
<tr>
<td>Campus Ivy</td>
<td>312</td>
</tr>
<tr>
<td>CampusLogic, Inc.</td>
<td>407</td>
</tr>
<tr>
<td>Cegment, Inc.</td>
<td>125</td>
</tr>
<tr>
<td>Champion College Services</td>
<td>425</td>
</tr>
<tr>
<td>Chetu Inc</td>
<td>426</td>
</tr>
<tr>
<td>Citizens Bank</td>
<td>510</td>
</tr>
<tr>
<td>CMD Outsourcing Solutions</td>
<td>327</td>
</tr>
<tr>
<td>College Ave Student Loans</td>
<td>317</td>
</tr>
<tr>
<td>Collegiate Support Services</td>
<td>349</td>
</tr>
<tr>
<td>Cooley LLP</td>
<td>335</td>
</tr>
<tr>
<td>cuLearn</td>
<td></td>
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<tr>
<td>Discover Student Loans</td>
<td>116</td>
</tr>
<tr>
<td>ECMC</td>
<td>133</td>
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<tr>
<td>Edfinancial Services</td>
<td>309</td>
</tr>
<tr>
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<td>425</td>
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<td>(Educational Funding of the South, Inc.)</td>
<td></td>
</tr>
<tr>
<td>Educational Partners</td>
<td>304</td>
</tr>
<tr>
<td>ELM Resources</td>
<td>211</td>
</tr>
<tr>
<td>Fastweb</td>
<td>422</td>
</tr>
<tr>
<td>Financial Aid Services</td>
<td>201</td>
</tr>
<tr>
<td>Financial Aid TV</td>
<td>347</td>
</tr>
<tr>
<td>First Marblehead Corporation</td>
<td>209</td>
</tr>
<tr>
<td>Goal Structured Solutions, Inc.</td>
<td>514</td>
</tr>
<tr>
<td>GoodCall</td>
<td>123</td>
</tr>
<tr>
<td>Great Lakes Higher Education</td>
<td>115</td>
</tr>
<tr>
<td>Corporation &amp; Affiliates</td>
<td></td>
</tr>
<tr>
<td>Hardwick Day, Inc.</td>
<td>137</td>
</tr>
<tr>
<td>iGrad</td>
<td>135</td>
</tr>
<tr>
<td>Inceptia</td>
<td>225</td>
</tr>
<tr>
<td>iontuition/i3Group</td>
<td>512</td>
</tr>
<tr>
<td>Jenzabar, Inc.</td>
<td></td>
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<tr>
<td>Lendkey Technologies, Powering cu Student Loans</td>
<td>439</td>
</tr>
<tr>
<td>Kentucky Higher Education Assistance Authority</td>
<td>419</td>
</tr>
<tr>
<td>NASFAA</td>
<td>108</td>
</tr>
<tr>
<td>National Endowment for Financial Education</td>
<td>134</td>
</tr>
<tr>
<td>National Health Service Corps</td>
<td>413</td>
</tr>
<tr>
<td>National Student Clearinghouse</td>
<td>410</td>
</tr>
<tr>
<td>Navient</td>
<td>443</td>
</tr>
<tr>
<td>Nelnet</td>
<td>300</td>
</tr>
<tr>
<td>NerdWallet</td>
<td>213</td>
</tr>
<tr>
<td>Next Gen Web Solutions</td>
<td>516</td>
</tr>
<tr>
<td>Pennsylvania Higher Education</td>
<td>441</td>
</tr>
<tr>
<td>Assistance Agency (PHEAA)</td>
<td></td>
</tr>
<tr>
<td>PNC Bank Education Loan Center</td>
<td>339</td>
</tr>
<tr>
<td>Regent Education</td>
<td>122</td>
</tr>
<tr>
<td>Ruffalo Noel Levitz</td>
<td>337</td>
</tr>
<tr>
<td>Sallie Mae</td>
<td>203</td>
</tr>
<tr>
<td>Securities and Exchange Commission</td>
<td>421</td>
</tr>
<tr>
<td>SelfScore</td>
<td>401</td>
</tr>
<tr>
<td>Scholarship America</td>
<td>415</td>
</tr>
<tr>
<td>Sigma Systems, Inc.</td>
<td>446</td>
</tr>
<tr>
<td>Signal Vine LLC</td>
<td>408</td>
</tr>
<tr>
<td>Student Loan Hero</td>
<td>403</td>
</tr>
<tr>
<td>The College Board</td>
<td>506</td>
</tr>
<tr>
<td>The Higher Education Assistance Group, Inc</td>
<td>424</td>
</tr>
<tr>
<td>Third Coast Higher Education</td>
<td>412</td>
</tr>
<tr>
<td>Tuition Management Systems</td>
<td>121</td>
</tr>
<tr>
<td>U.S. Department of Education</td>
<td>447</td>
</tr>
<tr>
<td>University Business</td>
<td>416</td>
</tr>
<tr>
<td>USA Funds</td>
<td>323</td>
</tr>
<tr>
<td>Utah Higher Education Assistance Authority</td>
<td>319</td>
</tr>
<tr>
<td>Vocado, LLC</td>
<td>346</td>
</tr>
<tr>
<td>Wells Fargo Education Financial Services</td>
<td>217</td>
</tr>
<tr>
<td>William Spelman Executive Search</td>
<td>334</td>
</tr>
<tr>
<td>Windham Professionals, Inc.</td>
<td>409</td>
</tr>
</tbody>
</table>
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Financial Aid Services (FAS) has been serving higher education for more than 25 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. For more information, please contact our Client Relations Team at 770-988-9447 or Info@FinancialAidServices.Org. Our website address is www.FinancialAidServices.Org.

Financial Aid TV ...........................................................347
P.O. Box 7139
Boulder, CO 80306
Email: damon@financialaidtv.com
www.FinancialAidTV.com

Financial Aid TV (FATV) is an online video service used by schools to improve customer service and reduce burdens on staff. FATV is used by schools to answer general questions and to help students understand the school’s Satisfactory Academic Progress Policy, through a service called “GetSAP”.

First Marblehead Corporation ....................................... 209
One Cabot Road
Medford, MA
Phone: 617-638-2000
Email: mhager@mfd.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.

Goal Structured Solutions, Inc. ................................. 514
402 West Broadway, 20th Floor
San Diego, CA 92101
Phone: 619-980-6441
Email: dwentworth@goalsolutions.com

The Ascent Program for Funding Education and its student loan components enables more students to gain access to higher education funding, with or without a cosigner, because we consider criteria other than credit history and current income when evaluating a student loan applicant. Ascent gives students the opportunity to improve their financial literacy, build a credit history, and manage their obligations to achieve success. Our loan is competitively priced and offers two flexible repayment options.

GoodCall .............................................................. 123
1101 Red Ventures Drive
Ft Mill, SC 29707
Email: carrie@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 .............................. 115
Corporation & Affiliates
2401 International Lane
Madison, WI 53704
Email: bfeller@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 solutions 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 website, contact your Great Lakes representative, or call (888)686-6919.

Hardwick Day, Inc. ...................................................... 137
8011 34th Ave South, Suite 450, Two Appletree Sq.
Bloomington, MN 55425
Email: kkostandin@royall.com
www.hardwickday.com

Hardwick Day, a division of Royall & Company, is the leading source for financial aid optimization, enrollment strategy, and net price calculators. We fine-tune financial aid policies, build award models, and offer full-cycle support to help colleges exceed revenue, recruitment, and enrollment goals.

iGrad ................................................................. 135
2163 Newcastle Avenue, Suite 100
Cardiff By The Sea, CA 92007
Phone: 267.679.1709
Email: jkelly@igrad.com
schools.igrad.com

iGrad is privileged to partner with more than 600 schools nationwide to provide a financial literacy platform that 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.
Inceptia ................................................................. 225
P.O. Box 82507
Lincoln, NE 68501-2507
Phone: 888-529-2028
Email: conferences@inceptia.org
www.inceptia.org

Inceptia exists to help schools launch brilliant futures for their students, free from the burden of debt. We support this mission through a complete spectrum of effective and uncomplicated financial aid management solutions. With our innovative tools, financial aid administrators get more time and freedom to focus on students – and students gain the knowledge needed to become financially responsible citizens. Learn more at Inceptia.org.

Jenzabar, Inc. .......................................................... 512
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Kentucky Higher Education Assistance Authority .......... 419
P.O. Box 798, 100 Airport Road
Frankfort, KY 40602-0798
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 Loans, and Advantage Parent Loans. 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 ...... 439
104 West 27th Street, 4th Floor
New York, NY 10001
Email: samuel.odonnell@lendkey.com
LendKey info:LendKey powers comprehensive private student loan programs complete with underwriting, origination, servicing, marketing and financial literacy solutions for lenders across the nation, including cuStudentLoans.

Lumina Foundation for Education ..................... Sponsor Only
Indianapolis, IN
Email: dcroom@luminafoundation.org
www.luminafoundation.org/looking-back-to-move-forward

In “Looking Back to Move Forward”, a documentary series produced by Lumina Foundation & the Institute for Higher Education Policy, key policy makers, their staff and education researchers provide insight into the evolution of federal student aid through their first-hand experiences with the process. Lumina is an independent, private foundation committed to increasing the proportion of Americans with degrees, certificates and other high-quality credentials to 60% by 2025. Lumina’s outcomes-based approach focuses on helping to design and build an equitable, accessible, responsive and accountable higher education system while fostering a national sense of urgency for action to achieve Goal 2025.

NASFAA ............................................................. NASFAA Booth
1101 Connecticut Avenue, NW, Suite 1100
Washington, DC 20036
Phone: 202-785-0453
Email: membership@nasfaa.org
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National Endowment for Financial Education ............. 134
1331 17th Street, Ste. 1200
Denver, CO 80202
Phone: 303-224-3520
Email: amarty@nefe.org
www.cashcourse.org

CashCourse is a free, online noncommercial financial literacy resource for colleges and universities, created by the nonprofit National Endowment for Financial Education (NEFE). The program provides customizable, interactive personal finance tools used at more than 950 colleges and universities across the country. Visit info.cashcourse.org to enroll or learn more.
National Student Clearinghouse ........................................ 410
2300 Dulles Station Boulevard, Suite 300
Herndon, VA 20171
Phone: 703-742-4206
Email: levathes@studentclearinghouse.org

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

National Health Service Corps ........................................ 413
5600 Fishers Lane, Room 13-64
Rockville, MD 20857
Phone: 301-443-1294
Email: tmcclintock@hrsa.gov

To educate on the scholarship and loan repayment opportunities through the National Health Service Corps (NHSC) Scholarship and Loan Repayment Program.

Navient ........................................................................ 443
123 S. Justison Street
Wilmington, DE 19801
Email: steven.wynne@navient.com

We work with more than 12 million customers on everything from loan servicing to government contracts, and we do so with the energy and focus of a new company and the stability and expertise of a Fortune 500 leader. Discover how we help individuals and organizations achieve at Navient.com.

Nelnet ................................................................. 300
121 So. 13th Street, Suite #400
Lincoln, NE 68508-1904
Email: alissa.johnson@nelnet.net

Nelnet Education Loan Servicing has provided excellent student loan servicing for more than 35 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.

NerdWallet .......................................................... 213
901 Market Street, Floor 6
San Francisco, CA 94103
Email: gianna@nerdwallet.com
www.nerdwallet.com

NerdWallet offers consumers clarity for all of life's financial decisions. Whether it's repaying your student loans or finding the right credit card, people lack the clear, unbiased information they need to make the best choice. With NerdWallet, consumers have free access to user-friendly tools and expert advice that save time and money and give them the freedom to do more. NerdWallet is based in San Francisco and employs more than 300 Nerds. For more, visit www.nerdwallet.com.

Next Gen Web Solutions ............................................. 516
6821 Southpoint Dr. N., Suite 220
Jacksonville, FL 32216
Email: taige.haines@ngwebsolutions.com
www.ngwebsolutions.com

Next Gen Web Solutions is a provider of software solutions for education administrators. Next Gen brings accuracy, compliance, speed, and security to school administrative processes that help students support their education. Web and mobile software solutions enable administrators to efficiently manage online forms, scholarships, student employment, online timesheets and other specialized processes that require electronically signed authorizations and real-time interactions with student information. Serving more than 370 higher education institutions across the country, we continuously strive to set ourselves apart through excellent customer service and a deep understanding of the workflows that power student success-driven institutions.

Pennsylvania Higher Education Assistance Agency (PHEAA) ............................................. 411
1200 North 7th Street
Harrisburg, PA 17102-1444
Email: dbrown1@phea.org
www.myfedloan.org

Building on PHEAA's 50-plus years of student aid experience, 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 ................................339
2600 Liberty Avenue, Suite 200
Pittsburgh, PA 15222-4616
Email: leslie.mcsweeney@pnc.com
www.pnconcampus.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 more than 50 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, PA 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 ........................................................ 122
12 West Church Street
Frederick, MD 21701
Phone: 800-639-0927
Email: adrian.white@regenteducation.com
Regent Education is the leading provider of software solutions that have revolutionized financial aid management and enrollment processes for schools using non-traditional enrollment models, including non-term, competency-based, borrower-based academic year, as well as more traditional models such as standard and non-standard term. Regent enables schools to have the academic flexibility they need, and not be hindered by the limitations of their financial aid management software. The advanced technology automates processes that typically require manual intervention – reducing operating costs, improving compliance and improving service. All Regent products are delivered via the Cloud, lowering the cost of ownership and providing automatic updates to institutions.

Ruffalo Noel Levitz....................................................... 337
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Cedar Rapids, IA 52404
Phone: 319-730-2492
Email: leah.teems@ruffalonl.com
www.ruffalonl.com
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Sallie Mae ................................................................. 203
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www.salliema.com/
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Scholarship America .................................................. 415
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SelfScore ................................................................... 401
Suite 200
Palo Alto, CA
Email: kalpesh.kapadia@selfscore.com
www.selfscore.com
SelfScore provides financial services and products to a deserving but underserved population of students starting with international students studying in the United States (1 million strong and growing). Current credit policies handicap them, leaving them unable to get a credit card, student loan, or car lease without paying exorbitant costs and fees. SelfScore is here to help provide a financial on-ramp for international students that puts them on a path towards success in the US.

Securities and Exchange Commission ...................... 421
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Washington, DC 20549
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Email: cordelln@sec.govInvestor.gov
The U.S. Securities and Exchange Commission’s (SEC) mission is to protect investors, maintain fair, orderly, and efficient markets, and facilitate capital formation. The SEC’s Office of Investor Education and Advocacy advances the agency’s mission of investor protection by providing educational programs and materials and responding to investors’ complaints and inquiries. In our investor outreach, we conduct presentations to help investors make informed investing decisions and avoid common scams. Our publications and resources are available at Investor.gov, an online resource for individual investors. Before You Invest, Investor.gov.
Sigma Systems, Inc. ..................................................... 446
2305 S. Colorado Blvd., Suite 100
Denver, CO 80222-5904
Email: aortiz@sigmasys.com
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 postsecondary educational institutions. We start with annual and term-based support for loans, state grants, Return of Title IV Funds (R2T4) calculations, Common Origination and Disbursement (COD), Borrower-Based Academic Year, and automated PLUS loan processing. The ProSAM Solution Suite continues with a highly-customizable, rules-based system that is deployable to many server and database platforms and is tied into student self-service portals, information systems, and enterprise applications. Our staff wraps up years of student budgeting and awards packaging experience to navigate the ever-changing complexity of federal and state programs.

Signal Vine LLC ............................................................408
950 N. Washington Street, Suite 400
Alexandria, VA 22314
Email: haley@signalvine.com
www.signalvine.com
Signal Vine is a data-driven and personalized text-messaging platform that allows advisors, counselors, and mentors to effectively engage with their students to improve outcomes in education.

Student Loan Hero .......................................................403
1000 East 5th Street #549
Austin, TX 78702
Phone: 7812235701
Email: max@studentloanhero.com
Student Loan Hero helps borrowers manage and repay their student loans.

The College Board .......................................................506
250 Vesey Street
New York, NY 10281
Phone: 866-630-9305
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®.

The Higher Education Assistance Group, Inc. ..............424
60 Walnut Street, Floor 4
Wellesley, MA 02481
Email: cking@heag.us
www.heag.us
The Higher Education Assistance Group (HEAG) is a financial aid and higher education consulting group. We provide Title IV Compliance Support, VERIFY-Remote Verification Support, Interim Staffing, File Review & Processing Services, Office Evaluations, Procedures & Training, and Technology Solutions to private, public, and proprietary institutions.

Third Coast Higher Education ......................................412
3435 N Sheffield Ave, Suite 207
Chicago, IL 60657
Phone: (312)725-6899
Email: jeanelocarnini@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; staff training and interim staffing solutions. With over 40 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.

Tuition Management Systems ......................................121
171 Service Avenue, 2nd Floor
Warwick, RI 02886
Phone: 4019213983
Email: jrossi@afford.com
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U.S. Department of Education .....................................447
830 First Street NE
Washington, DC 20202-5252
Department of Education Ask-a-Fed: If you would like to discuss a Title IV-related question (policy guidance, administrative procedures, operational requirements, etc.), stop by the Ask-a-Fed table to talk with one of our experienced Department of Education staff members. If an answer cannot be determined immediately, every effort will be made to provide an answer via e-mail during, or shortly after the conference. Note - the Ask-a-Fed desk will close at 3:45pm on Tuesday.
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USA Funds Borrower Connect™ offers a complete array of student loan default prevention options, including an award-winning Web-based tool that automates borrower communication; contact and counseling support to conduct outreach to your borrowers to promote successful repayment; and predictive analytics to enhance the effectiveness of your default prevention efforts.

### Utah Higher Education Assistance Authority

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Email: baguayo@utahsbr.edu  
www.uheaa.org

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www.vocado.com

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### Wells Fargo Education Financial Services

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Email: joan.m.mcilvenna@wellsfargo.com  
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Wells Fargo Education Financial Services has been in the student lending business since 1968 and serves more than 1.05 million customers. We provide private student loans directly to consumers to help finance their education and develop free financial education resources to help them succeed financially. For more information, visit www.WellsFargo.com/Collegeready.

### William Spelman Executive Search

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Webster, NY 14580  
Email: megan@wspelman.com  
www.wspelman.com

William Spelman Executive Search (WSES) is a nationally-recognized executive search firm specializing in identifying and recruiting highly-qualified and diverse candidates for positions within financial aid. With over 25 years of executive-recruitment experience, the qualified leaders of WSES have personal connections with hundreds of practicing senior administrators. Come visit with us and learn more about how WSES can help you in your next search, either as a candidate or as an institutional partner.

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To learn more about the SOE program:

Visit the NASFAA booth:
- Sunday, 2:00pm - 5:15pm
- Monday, 8:00am - 12:30pm, 1:45pm - 6:00pm
- Tuesday, 8:00am - 12:00pm, 2:15pm - 4:15pm

Attend the following conference sessions:
- NASFAA Standards of Excellence Review Program: Remove the Risk
  Sunday, 4:15pm - 5:15pm
- Making the Most of NASFAA Membership – Using NASFAA Tools
  Monday, 11:00am - 12:00pm

After the conference, please contact the SOE Program Administrator directly at excellence@nasfaa.org or (202) 785-6953 or visit nasfaa.org/soe.
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