

“Waves of Change: Oceans of Opportunity”

OASFAA 2017 Spring Conference

Hilton Columbus Polaris

May 8-10, 2017

Agenda

Monday, May 8, 2017

8:30-11:45am NASFAA Credential Workshop

Packaging and Award Notifications (pre-registration required) - Financial aid packaging involves employing strategies to distribute limited financial aid resources to qualified students to attend the postsecondary school of their choice. The packaging process combines various types of Title IV and non-Title IV aid from federal, state, institutional, and private entities, to help meet the financial need of college students. Rules for packaging some Title IV aid are different from the rules for packaging non-Title IV aid. This credential workshop will walk you through the options and teach you how to employ various packaging methods. At the conclusion of the workshop, you will be qualified to take the credential exam. You will receive a voucher code that covers the cost of the exam.

11:15am-12:00pm Registration & Exhibits Open

12:00-1:30pm Lunch and Keynote Speaker

1:30-1:45pm Break

1:30-5:00pm Registration & Exhibits Open

1:45-2:35pm Interest Sessions

New Member - Welcome to OASFAA! If you are a new or relatively new member, and are attending conference for the first time, this session is for you! This session will provide an opportunity to celebrate your new membership and learn more about the OASFAA organization. This is also a great opportunity to meet other new members, and ask any questions you may have as a first-time attendee!

Satisfactory Academic Progress: From Policy to Application (download materials from OASFAA.org prior to attending) - This NASFAA Training is offered at no additional cost to your conference registration. At the end of the training, you will be able to understand the basic standards that a school must include in its SAP policy, assess your existing institutional SAP policy and determine if adjustments are appropriate, recognize choices that a school has in determining specific aspects of a school's SAP policy, identify situations that may or may not warrant the extension of utilizing a financial aid warning, financial aid probation, or academic plan, and understand SAP consumer information requirements and what must be provided to prospective and current enrollment students.

All Shaken Up – Professional Judgment in the Era of PPY - High tide comes every day just as frequent changes make their way into the financial aid office. The change to using PPY data, though, was an historical change and has implications we haven't fully realized yet. Professional judgment will continue to be impacted by PPY and we will explore how one office is addressing it.

From Application to Graduation: Removing Barriers to Student Success - Students face enormous non-academic barriers to successfully navigating their educational experience. This session will explore seven obstacles to student success and share strategies on how to help them stay on track with their academic, financial and career goals.

Overlapping Loans & Loan Proration - Overlapping loans and loan proration have been around since the beginning of time with loans, but we still find ourselves with questions and concerns about the best way to calculate these and how to advise our students. The various nuances of loans can be overwhelming, so it's best to start from the very beginning! This presentation is going to start with the basics, to remind ourselves of why these rules exist and the basic foundation of the calculations. Then, the presentation will quickly move into some more involved examples that we'll walk through together, including some examples for our schools that have modules!

2:35-3:00pm

Dessert Break

3:00-3:50pm

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Active Threat Response: Using Lessons Learned - Participants will learn the definition of an active threat, mentality of the suspect, how past events have shaped our response, and hands on techniques for responding to an active threat situation.

Super Manager: Be the Boss Everyone Wants to Work For - As a manager, overseeing employees' performance is an essential obligation. Yet, it's more than just ensuring a timely schedule of operations and quality production. Organizations that surpass expectations with unmatched success ensure employees receive the necessary support, resources, and guidance to get the job done. It takes a special manager to increase employee engagement and satisfaction in the workplace? It takes a super manager. This session will help you at all levels, with the necessary know-how to help your employees grow in their abilities and motivate them to go above and beyond expectations. Participants will explore the qualities, behaviors, skills, and tools to help them become the manager everyone wants to work for.

529 Savings Plans: Updates and Changes – College Advantage, Ohio's 529 college savings plan has been helping families save and plan for their children's higher education for more than 25 years. With more than \$650 million per year for beneficiaries' higher education expenses – with a large part of those beneficiaries attending school in Ohio. Come hear what updates keep College Advantage one of the leading 529 plans in the country.

How to Plan, Prepare and Pull Off the Perfect High School Financial Aid Night or FAFSA Event - With the changing landscape of FAFSA completion events and the changes in the FAFSA process, it is even more important for Financial Aid professionals to be prepared to "get the word" out to students and parents! Ever wanted to do a FA night for a local high school or plan a FAFSA event, but just don't know how or what to present? Then this is the session for you! This session will provide you with the tools and resources you need to confidently plan and execute the perfect event. Attendees will learn how to plan, prepare and deliver a financial aid night or FAFSA event. The session will include tools and resources needed for the event. The tools and resources will include (but not limited to) a sample planning calendar, sample handouts and presentation.

4:00-4:50pm

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Race Matters...So Does Gender - This session will look at implicit biases that none of us can escape. We will start the conversation about why we don't embrace diversity and differences more easily. The conversation will dig deeper than just the concept of why we should be diverse, and talk about the challenges of change in the way we think, feel and act. It is the goal that participants come away understanding that we all have biases, and be able to recognize what role they play in our decision making that could impact our work.

Ten Ways for Students to Lower Their Debt - There are proven ways that students can lower their student debt before, during, and after their college years. In this session we will explore ten ways for students to lower their student debt throughout their educational career, offering counselors a go-to power point you

can use with students. Additionally, you will learn about Case Western's counseling approach to assisting students with high indebtedness in creating a degree completion plan.

Networking and Conference Building in OASFAA - In real estate, the buzzwords are "Location, location and location". In most other businesses, the buzzwords are "Networking, networking, and networking!" You may be one of those gifted folks who can walk into a room or sit down at a table full of strangers, start a conversation and begin a friendship. Most of us cannot! This session will look at some tricks and tips for identifying and overcoming some of the obstacles we face when trying to meet new folks or when we find ourselves in a situation where we don't know anyone. If you can immediately engage a stranger in conversation, please come and share with us - we'd love to hear from you!

Constructing a Framework for Dealing with School Closures - On September 6th, after losing the ability to award Federal Student Aid, ITT Technical College announced it's closing of 130 campuses and displacing thousands students in 38 states across the country. As one of the largest school closures in our nation's history and many students are left with no place to transfer, several colleges began to assess their ability to help these students through special course evaluation, credit assessment, and prior learning options to help students to continue their education. From troubleshooting questions about loan discharge options, Pell limits, and credit transferability, colleges have developed a customized strategic enrollment plan to help displaced students. This session will discuss that your college can help students that are impacted by a school closure. We will highlight the enrollment management strategies for communication and collaboration, and obstacles students face when dealing with a school closure.

6:30-8:00pm Dinner

Tuesday, May 9, 2017

7:30-11:30am Registration & Exhibits Open

7:30-8:30am Breakfast

8:00-10:00am General Session: State Update, NASFAA Update

10:00-10:50am Interest Sessions

Leadership (Invite Only) - Financial Aid Ethics

Taking the Road to Relevance - The book *Road To Relevance* addresses factors that professional associations should consider in order to keep their work pertinent to a changing membership. MASFAA leadership have been using the insights from this book as a guide to examine how we can operate in the most meaningful way. Personally I see correlations from these concepts at the individual level as well. Come join in on an exploration of how we can make ourselves more relevant to our employers and profession.

"Who Am I? Who Are You? Who Are We?" – This session explores social identities, group dynamics, and privilege. During this interactive session, participants will get an introduction to social identities and how they show up in our daily lives. Participants will engage in reflection and dialogue about the unique aspects of their identity while also learning about others.

Opening Doors to Opportunity through Financial Education - While resumes, cover letters and online profiles are all staples in the job-seekers toolkit, financial capability – including the understanding of personal finance concepts and how to apply them to real-life scenarios – is often an unrecognized but valuable weapon in the employment game. This session opens with a conversation about the personal financial skills that job-seekers can benefit from, including both the knowledge and the tactical application. For example: Budgeting + factoring in student loan obligations; Credit scores and reports + improving yours for job placement; The power of compound interest + the importance of salary negotiation; Investment options + how to take advantage of workplace retirement plans. Resources that can be used, along with strategies to get buy in from colleagues and participants, are provided. Participants are encouraged to share and discuss their own experiences and resources to add to the collective possibility pool!

Advocacy and You - This session will touch on the main principles of successful advocacy strategies. An overview will be given of how NASFAA enacts those strategies at the Federal level through relationships with Congressional staffers, the Department of Education, and the Administration. In addition to highlighting useful NASFAA tools and resources, the session will also cover tips and strategies on how to

successfully advocate at the grassroots level, and outline how you can plan your own advocacy event! No session will better support of conference theme of “The Challenges of Change.”

10:50-11:10am	Beverage Break
11:10-11:30am	Regional Meetings
11:30am-1:15pm	Lunch, OASFAA Business Meeting, MASFAA Update
1:15-4:00pm	Registration & Exhibits Open
1:20-2:10pm	Interest Sessions

Leadership (Invite Only) - Performance Management

Making Connections & Building Relationships with Students from Different Cultures & Generational Gaps – Come and discuss how cohort based student groups like MAN Initiative, Women’s Connection, Diversity Learning Community (PONO), Advanced Leadership Series (CSLS Advanced-Columbus State Leadership Society) sponsoring various cultural celebrations, workshops and other special events have a positive impact in helping students with diverse backgrounds feel connected academically, socially and focused on a pathway towards completion.

Ready, Set, Active: Pell Calculation & Recalculation Dates - In this session we will address the different ways in which Pell recalculation dates may be utilized and how they impact the awarding process. Case scenarios will be provided to illustrate recalculation rules and census dates in various situations as students add and drop courses, including in programs offered in modules.

Reviewing & Rethinking Presentations - This session will discuss best practices for creating and executing an engaging presentation. We will discuss working with various platforms such as MS PowerPoint and Prezi. Engaging and captivating your audience, especially when you are dealing with students, can be incredibly challenging. We will discuss how to make your presentations exciting and ways to use “gamification” (presenting/teaching with game playing methods) in your sessions.

Work Life Balance/Stress Management - What does “Having It All Mean”? Does that mean doing everyone’s job? Are you always juggling too many things at once? Are you stressed about being stressed? This session will give you information from some of the experts – Stephen Covey & David Allen, as well as the learnings from a mother of three. We will discuss real life situations and experiences and help participants with balancing work, family life and everything else in between.

2:20-3:10pm	Interest Sessions
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Leadership (Invite Only) - Resume Building

Creating a Climate in which LGBTQ People Matter - Everyone who works at a college or university plays an important role in creating a climate where people not only feel welcome, but also know that they are an integral part of the community. In this session, we will examine the often hidden ways that institutions can reinforce bias based on gender identity and sexual orientation. Then, while understanding that all identities are intersectional, we will explore some considerations of particular relevance to LGBTQ people, and more specifically LGBTQ college students. Finally, we will discuss not just ways to accommodate LGBTQ people, but ways that learning from LGBTQ community members can make our institutions better places for everyone.

Who’s Defaulting and Why: An In-depth Look at the Root of Loan Default - In this session we will define what a defaulted borrower analysis is and review the timing of loan default. We will also look at the reasons for defaulting as well as the characteristics of loan defaulters. Finally, we will examine default factors unique to your institution and walk through how to conduct your own defaulted borrower analysis.

8 Big Ideas for Student Retention - Increased transparency and a greater focus on outcomes are leading to new strategies aimed at improving student retention and, ultimately, graduation rates. This interactive session will explore eight ideas that are proven to be effective at boosting retention rates. Participants will have the opportunity to share strategies that have worked at their institutions.

Survey Data Gathering - Lions, Tigers and Bears – OH MY!!! Or, the dreaded surveys also known as IPEDS, College Board, CDS, Peterson’s, U.S. News, Princeton Review, Wintergreen Orchard House... Are you burdened by numerous surveys every year? Are you looking for help to “tackle the beast”? This session will offer a practical approach to managing the survey process.

3:10-3:35pm	Dessert Break
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3:35-4:25pm

Interest Sessions

Leadership (Invite Only) - The 5 Languages of Appreciation

DACA and Undocumented Students - DACA and Undocumented statuses as it relates to financial aid. Very fluid topic currently and updates will be provided.

Half the Questions/All the Aid - The challenge of change is upon us. NCAN has spent over a year working to create a streamlined version of the FAFSA that will require approximately half the current questions but produce similar results for aid offices. NCAN and NASFAA's simplification proposals are similar but not exact. Come prepared to provide feedback to NCAN as we continue to refine our prototype to be ready for reauthorization. We want everyone to collaborate as we make a streamlined FAFSA a "force of the future."

A Deeper Understanding to the 150% Direct Subsidized Usage Limit Rule - The challenging change of understanding when Subsidized Usage Limit Applies (SULA) is certainly a forced to be reckoned with as we continue to drive towards the future! This presentation will help you understand the basics of the 150% Direct Subsidized Usage Limit rule and when it applies to students. This presentation will be a group effort as we walk through examples from a student reaching their limit, talking through advising tips, and discussing some common characteristics that put students at most risk for reaching their limit before they finish their program. We will also discuss the importance of counseling to these students, and ensure an understanding of the counseling requirements around these not so new regulations. By the end of the presentation, we hope we all walk away with a conversational understanding of this rule, and how we can better serve our students.

New Member Follow-Up: What Now? - Congratulations New Members! You've made it through the second day! Or, maybe you're a new member who was unable to attend the first New Member session on Wednesday. Whatever the case, this session will focus on how you can become more involved in OASFAA and exemplify the opportunities the organization can afford you on both a professional, and personal level.

4:35-5:30pm

General Session

The 411 on 399 - With the same income and tax information being used on the 2016-2017 and 2017-2018 FAFSAs, the likelihood of conflicting information is increased. In this session we will discuss when such conflicts must be resolved and explore how verification both relates to, and is distinct from, resolving conflicting information.

6:00-7:00pm

President's Reception

Wednesday, May 10, 2017

7:30-10:00am

Registration Open

7:30-8:30am

Continental Breakfast

8:30-9:45am

Federal Update

9:45-10:15am

Break/Hotel Check Out

10:15-11:05am

Interest Sessions

Cross Campus Communication - The ability to communicate effectively is one of the most valuable skills we use within the workplace. Many of us work on campuses where communications between different departments can be challenging. In this session, we will discuss the various communication struggles from the perspective of the bursar, admissions, and financial aid offices. We will discuss these challenges and give guidance regarding cross campus communications.

HEI Training - This session will provide an overview of the state financial aid programs; Nurse Education Assistance Loan Program (NEALP), Ohio College Opportunity Grant (OCOG) and Ohio War Orphans Scholarship (WOS) and cover the financial aid side of the HEI System (restricted outputs, queries, submitting payment & adjustment files and more).

Credit Basics and Understanding Private Student Loan Underwriting - This session will provide information on the basics of credit, how credit works, and how FICO scores calculated. This session will also provide

information on private loan underwriting - what elements are factored into the underwriting process and how they are evaluated by lenders.

Technology Applications for the Financial Aid Office - What better way to face the challenges of change than by learning how to wield technology to improve performance and efficiency in the Financial Aid Office. The tips and tricks you learn here are sure to CHANGE your life!

11:10am-12:00pm

Interest Sessions

Verification for 2017/2018 - This session will include a discussion of the verification requirements for the 2017–18 FAFSA cycle, as well as reminders about verification updates for 2016-2017.

Tapping into the Future: Social Media in the Financial Aid Office - Is your financial aid office on Twitter or Instagram? Your students are. This session will provide an overview of social media platforms and best practices for creating a social media plan for your financial aid office.

Financial Aid Jeopardy - A fun interactive way to test your financial aid knowledge and learn something new! This information will directly assist you in the 2016-17 academic year and beyond. Categories include; FAFSA, Potpourri, Verification, Student Loans, and more. Join us in a game of Financial Aid Jeopardy where you will be split up in teams to see who takes home the win.

Ohio National Guard Scholarship Program - The history of the Ohio National Guard Scholarship Program and the way moving forward. The program has been the same for the last 30 years; we will be discussing the upcoming changes and advancements that will allow us to function more effectively, and provide service and support to our military service members in the Ohio National Guard.

12:10-1:15pm

Lunch & Awards Ceremony

Updated 3-27-17