

**“Power of Our Past – Force of Our Future”**  
**OASFAA 50th Anniversary**  
**2018 Fall Conference**  
**Sheraton Columbus Hotel at Capitol Square**  
**October 24 – 26, 2018**  
***Agenda***

**Wednesday, October 24, 2018**

8:00am-11:45am                      NASFAA Credential Workshop – **Satisfactory Academic Progress (SAP)**  
**(pre-registration required)**  
**Presenter: Betsy Johnson, Bowling Green State University**  
**Moderator: Emily Haynam, The Ohio State University**

In this session, we will be following the NASFAA University Credentialed Training materials. Student will be introduced to SAP, learn the basics of evaluating SAP, learn the ins and outs of SAP appeals, probation, and academic plans, and other important SAP policy elements.

10:00am-11:45am                      Registration & Exhibits Open

12:00pm-1:15pm                      Lunch, Presidents’ Welcome; Special Recognitions, Housekeeping items

1:15pm-5:00pm                      Registration & Exhibits Open

**Interest Session**

1:30pm – 2:20pm

- **New Member Welcome**

Presenter: **Meghann Fraley**, University of Rio Grande  
**Jennifer Toomey**, Case Western Reserve University  
Moderator: **Meghann Fraley**, University of Rio Grande  
**Jennifer Toomey**, Case Western Reserve University

*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 a great opportunity to meet other new members, learn about committees in the OASFAA and ask any questions you may have as a first time attendee!*

- **Understanding our Diverse Student Populations**

Presenter: **Kimberly Creasap**, Denison University  
Moderator: **Judy Cunningham**, Ohio Tuition Trust Authority

*Creating a safe and welcoming environment in which all can pursue academic goal. Discussion of gender identity, personal pronouns, gender neutral pronouns.*

- **Resolving Over Awards**

Presenter: **Leigh Jackson**, University of Cincinnati  
Moderator: **Leigh Jackson**, University of Cincinnati

*Learn the basics of resolving over awards and overpayments. Topics covered will include federal requirements, common causes, and best practices for creating your institutional policies.*

## Wednesday, October 24, 2018 – Continued

### Interest Session

1:30pm – 2:20pm

- Enrollment Management: Past, Present, Future  
Presenter: **Angela Johnson**, Cuyahoga Community College; **Susan Kannenwischer**, Capital University  
Moderator: **Laura Meek**, Denison University

*Do you have a seat at the Enrollment Management table at your institution? If not, you should! Come learn how EM has developed through the years, how Financial Aid fits in the model and how we as financial aid professionals strategically support institutional goals.*

- Past Presidents' Meet & Greet – Round Table Discussion (invitation only)
- Leadership Class (invitation only)

**2:20pm – 2:45pm**

**Dessert / Beverage Break**

2:45pm – 3:35pm

- NASFAA Credential: Verification  
Presenter: **Nathan Zwayer**, The Ohio State University  
Moderator: **Emily Haynam**, The Ohio State University

*In this session, we will be following the NASFAA University Credentialed Training materials. Students will be introduced to verification, changing applicant data, disbursements, timeframes, policies and procedures.*

- Accessing Web Content Compliance w/ ADA Requirements
- Professional Judgment: Is your decision being influenced by your biases?  
Presenter: **Olga Byxbee**, American Public University System  
Moderator: **Mary Cannon**, Hondros College of Nursing

*Do you complete Professional Judgment decisions at your institution? Is your decision being influenced by your bias? This session will discuss biases and hidden biases that may be sneaking their way into your PJ process!*

- Past President's' Meet & Greet- Round Table Discussion (invitation only)
- Direct Loans and the Process  
Presenter: **Ashley Eder**, DeVry Education Group; **Jennifer Toomey**, Case Western Reserve University  
Moderator: **Ashley Eder**, DeVry Education Group; **Jennifer Toomey**, Case Western Reserve University

*This session will dive deeper into the world of Federal Direct Loans through the use of COD (Common Origination & Disbursement), CPS (Central Processing System) and NSLDS (National student Loan Data System). We will discuss some of the common issues that arise with Direct Loans and the systems needed to process them.*

- VA Education Benefits  
Presenter: **Harry Dulick**, U.S. Department of Veteran Affairs  
Moderator: **Tamika Braswell**, Ohio Department of Higher Education

*If you are a higher education college administrator or school certifying official in need of resources to support and create quality connections with student Veterans, this session is for you. Come and find information about the changes to the GI Bill, certification issues, Compliance Surveys and more. This session will offer resources that will help you assist student Veterans pursuing education and training with VA benefits.*

**3:35pm – 3:50pm**

**Beverage Break**

3:50pm – 4:40pm

- NASFAA Credential: Verification (Part II) – (Continued from 2:45pm session)

Presenter: **Nathan Zwyer**, The Ohio State University

Moderator: **Emily Haynam**, The Ohio State University

*In this session, we will be following the NASFAA University Credentialed Training materials. Students will be introduced to verification, changing applicant data, disbursements, timeframes, policies and procedures.*

- Customer Service Gen Z – (panel)

Presenter: **Joe Fries**, Sallie Mae; **Erica Henry**, University of Cincinnati

Moderator: **Joe Fries**, Sallie Mae

*Please join the University of Cincinnati and Sallie Mae as we analyze the impact of Gen Z as they rapidly become the largest generation on our planet today and on your campus. We will explore their tremendous influence over norms, expectations and behavior, and highlight the financial, buying habits and expectations of Gen Z and how to engage them. We will also provide insight into how your college and university peers are managing Gen Z expectations on their campus.*

- Transient Student/ Consortiums

Presenter: **Kirby Adams**, Sinclair Community College

Moderator: **Kirby Adams**, Sinclair Community College

*Consortiums are often thought of as one of the “Great Unknowns” in the financial aid world. This session intends to break down some of the uncertainty surrounding consortium agreements, transient students, and the process involved. We will start with basic definitions and regulations, and work into examples and best practices.*

- Shaping the Future with Financial Education

Presenter: **Jennifer Schroeder**, Iowa State University

Moderator: **Deb Langdon**, Marion Technical College

*The state of Iowa is working to shape their students financial futures by requiring financial education training for all new freshman. Through this session, learn how three universities in Iowa have implemented this requirement and the outcomes they are seeing.*

- Standard Terms Are the Way of the Past–Can They Be the Wave of the Future?

Presenter: **Zack Goodwin**, U.S. Department of Education

Moderator: **Lauren Urban**, John Carroll University

*Have you been approached by academic leaders at your institution about the development of a new program with a non-traditional format, while in the past your programs have been offered only in standard terms? In this session we will explore how many apparently non-traditional academic calendar formats can continue to be considered standard-term for Title IV purposes, to minimize the need to modify your aid processes. Specifically attendees will learn how certain flexibilities in standard-term programs, such as modules, intersessions and competency-based models, can make accommodating academic change easier.*

- Lessons Learned as a Financial Aid Director

Presenter: **Randy Green**, Wittenberg University; **Meghan Fraley**, Rio Grande University

Moderator: **Emily Goldman**, Hondros College of Nursing

*Whether you are a seasoned veteran, newly hired, or an aspiring director, join us for a session about lessons learned as a financial aid director. In this Q&A session, panelists will share their experiences regarding challenges in aid office management, leadership lessons, skills acquired, and some favorite stories.*

Wednesday, October 24, 2018 – Continued

5:45pm/6:30pm President's Reception  
6:30pm/8:00pm 50th Anniversary Dinner  
Past President Recognition  
8:00pm/11:00pm Entertainment



## **Thursday, October 25, 2018**

7:30am – 11:30am	Registration & Exhibits Open
7:30am – 8:30am	Breakfast
8:00am – 8:30am	OASFAA Business Meeting
8:30am – 9:30am	General Session: State Update, MASFAA Update

### **Interest Session**

9:40am – 10:25am

- **The New School Mindset—Thrivent Student Resources**  
Presenter: **Greg Carlo**, Thrivent Student Resources  
Moderator: **Greg Carlo**, Thrivent Student Resources

*Our team's purpose is to help students and families see money for what is really is. Not a goal. Not just the things it can buy. A tool, for chasing your dreams within your means, so you can live a life of contentment, confidence and generosity. We offer online, do-it-yourself resources for navigating the journey before, during and after college. And for those who prefer to work one-on-one, our Thrivent Scholars Network has college planning experts ready to personally guide you through all aspects of college financial readiness.*

- **Student Success Solutions**  
Presenter: **Becky Davis**, Great Lakes Higher Education Corporation  
Moderator: **Becky Davis**, Great Lakes Higher Education Corporation

*The path to a college degree—and a better future with long-term financial wellness isn't an easy one for many students. They face complex barriers getting through college and many take on unmanageable debt along the way. Increasingly, schools are being held accountable for student success. Great Lakes mission has always been student success and we have created a suite of products to help you help your students succeed.*

- **One Student Loan, Twice the Impact Business Solutions**  
Presenter: **Jane Lemke**, CommonBond  
Moderator: **Jane Lemke**, CommonBond

*Join us to learn about CommonBond's commitment to the future of students through our low-cost products and our partnership with Pencils of Promise to provide schools, teachers, and technology to thousands of students in the developing world. The presenter will also share counseling tools which you can use to advise your graduates, so they can determine if refinancing is right for them.*

- **Mobile Financial Aid: What Your Students Really, REALLY Want**  
Presenter: **Daniel Gonzales, Regional Director, CampusLogic**  
Moderator: **Daniel Gonzales, Regional Director, CampusLogic**

*Students today are used to mobile, online communications—they aren't used to waiting for information. Too often, complicated, manual, generic financial aid processes create barriers to student success. Don't believe us? Believe the 730 students we surveyed nation-wide. Hear about the improvements they want to see made to the FinAid process. Meet the platform that delivers what students want: an easy, mobile, personalized experience. Hear about the dramatic impact CampusLogic has had on the student experience at other institutions.*

**10:25am – 10:45am**

**Beverage Break**

## Thursday, October 25, 2018 – Continued

10:45am – 11:35am

- Why Financial Aid, Aspiring Leaders, and leading in the 21st Century

Presenter: **Nick Prewett**, The University of Missouri

Moderator: **Susan Kannenwischer**, Capital University

*This session is an overview of the financial aid office. It examines the tools, skills, and desire necessary to be a successful financial aid director. Information regarding legislation & regulation, effective communication, technology, enrollment management, and adaptation to an ever-changing world of financial aid. If you want to become a true champion and leader, this session may be for you.*

- Tax Transcripts, Non-Filer Letters, & DRT-Tips and Resources

Presenter: **Renee' Lamp**, Cuyahoga Community College; **Kirby Adams**, Sinclair Community College; **Jennifer Toomey**, Case Western Reserve University

Moderator: **Jared Nofziger**, Valor Christian College

*Panel discussion about how multiple schools assist students in ordering their Non-Filer letters, Tax Return Transcripts, Wage Statements, and navigating the Data Retrieval Tool through the FAFSA. We will also discuss how to read a tax transcript versus a Tax return and provide cheat sheets for attendees to take back to their offices.*

- The Vital Partnership Between the Financial Aid Office and Retention

Presenter: **Dave Deibel**, Educational Credit Management Corporation

Moderator: **Adam Dilulio**, Cuyahoga Community College

*The issue of student retention and persistence continues to grow. Persistence and retention rate is greatly affected by the level and quality of student interactions with peers and high touch offices on campus. This session will focus on the collaborative impact the FAO can have on both.*

- Keeping the Dream Alive

Presenter: **Christina Streety-Napier**, Kent State University

Moderator: **Judy Cunningham**, College Advantage

*Diversity issues can at time be a difficult topic, and looking for solutions to best assist our students can often present a challenge for administrator. This interactive session, set in the style of a game show, is designed to enlighten the attendees to peer beyond the surface of the student's financial need. In the game show, participants will be faced with some real life circumstances and must choose, what is behind one of the unknown curtains. The players, along with their teams, will strategize for solutions to overcome the pitfalls and keep their educational dream alive.*

- Federal tools & Resources: There's an App for That

Presenter: **Fred Stennis**, Federal Student Aid

Moderator: **MorraLee Keller**, National College Access Network

*Federal Student Aid recently launched a new app for completing the FAFSA and more. The FAFSA website has been redesigned. FSA has created tools and resources to help you in your work. Come learn about tools that will help you be a force of the future in our work.*

## Thursday, October 25, 2018 – Continued

11:40am – 11:55am

- NE Region  
Moderator: **Megan Edwards**, The University of Mount Union
- NW Region  
Moderator: **Philip Birkey**, Ohio Northern University
- SE Region  
Moderator: **Sheila Nelson-Hensley**, Belmont College
- SW Region  
Moderator: **Bailey Bartels**, University of Cincinnati
- Associate Member Meeting  
Moderator: **John Brown**, Capitol University; **Jeff Johnston**, Sallie Mae

12:00pm – 1:50pm                      Lunch, NASFAA Update – Karen McCarthy

1:50pm – 4:00pm                      Registration & Exhibits Open

### Interest Session

2:05pm – 2:55pm

- Need Analysis  
Presenter: Need Analysis Committee  
Moderator: Need Analysis Committee
- Loans 101 and Direct Loan Trivia  
Presenter: **Ashley Eder**, DeVry Education Group; **Jenn Toomey**, Case Western Reserve University  
Moderator: **Heidi Sisson**, Cognition Financial  
  
*Come test your knowledge and learn a few things about the Federal Direct Loan Program. This engaging session will highlight the basics on the Federal Direct Student Loan Programs through an interactive presentation.*
- Mental Health of Higher Education Staff  
Presenter: **Kevin Berg**, Cuyahoga Community College; **David Nardecchia**, Cuyahoga Community College  
Moderator: **Renee' Lamp**, Cuyahoga Community College  
  
*There are multiple facets of mental health and the relationships people have. This session will cover the importance of understanding mental health for professionals while working in busy and stressful environments. We have learned in the past how to identify when a student is struggling emotionally, but do we know how to help ourselves. Let us see what resources we can utilize to keep the stamina we need to work in Higher Education.*
- Legs, Regs, and You  
Presenter: **Karen McCarthy**, NASFAA  
Moderator: **Betsy Johnson**, Bowling Green State University  
  
*Wondering about the difference between legislation and regulation? How are each made, governed and enforced? How do they impact the day-to-day work you do as a financial aid administrator? This session will provide a "101" on development and implementation of legislation and regulation, and how it pertains to you and your role.*

## Thursday, October 25, 2018 – Continued

- Trauma – Informed Student, Parent, and College Engagement (Part I)  
Presenter: **Kimberly Brazwell**, Kimistry LLC  
Moderator: **Vena Hill**, Columbus State Community College

*How much could our past experiences be shaping our present and future relationships? Through the examination of SAMHSA'S (Substance Abuse and Mental Health Services Administration) eight dimensions of wellness, the ACE's study research, identity & cultural competence, attendees will practice steps of richer engagement in highly interactive discussions.*

- Leadership Class (invitation only)

**2:55pm – 3:10pm**

**Dessert / Beverage Break**

3:10pm – 4:00pm

- Need Analysis  
Presenter: Need Analysis Committee  
Moderator: Need Analysis Committee
- Verification: Days of Future Past  
Presenter: **Zack Goodwin**, U.S. Department of Education  
Moderator: **Lauren Urban**, John Carroll University

*In this session we will review current requirements for verification, for 2018-2019 and 2019-2020 (spoiler alert – they are the same!). Time will also be left for discussion of prospects for future requirements.*

- Trauma – Informed Student, Parent, and College Engagement (Part I)  
Presenter: **Kimberly Brazwell**, Kimistry LLC  
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*How much could our past experiences be shaping our present and future relationships? Through the examination of SAMHSA'S (Substance Abuse and Mental Health Services Administration) eight dimensions of wellness, the ACE's study research, identity & cultural competence, attendees will practice steps of richer engagement in highly interactive discussions.*

- Leadership Class (invitation only)
- Identifying & Preventing FA Fraud  
Presenter:  
Moderator: **Emily Goldman**, Hondros College of Nursing

4:10pm – 5:00pm

- Need Analysis  
Presenter: Need Analysis Committee  
Moderator: Need Analysis Committee
- Trends in Higher Education  
Presenter: **Tamika Braswell**, Ohio Department of Higher Education  
Moderator: **Adam Dilulio**, Cuyahoga Community College

*Trends in Student Aid and Trends in College Pricing are annual reports by the CollegeBoard that provide the latest data on trends over time in student aid, tuition, and other expenses associated with attending college. Using the most current trend data published in October of 2018, this presentation will highlight key trends that will help you understand both national and Ohio specific areas.*



**Thursday, October 25, 2018 – Continued**

- Hitting Refresh on Career Advancement and Job Searches  
Presenter: **Hank Malin**, Denison University; **Laura Meek**, Denison University  
Moderator: **Renee' Lamp**, Cuyahoga Community College

*Do your job search methods and resume need a refresh? Do you desire to move ahead in your career in Financial Aid? Do you need a new primer in job-hunting skills? Let us help with practical strategies in moving up the ladder, conducting a job search and remodeling your resume.*

- Consumer Information Panel  
Presenter: **Faith Phillips**, Central Ohio Technical College & Ohio State Newark; **Todd Everett**, Mount Carmel College of Nursing; **John Brown**, Capital University  
Moderator: **Faith Phillips**, Central Ohio Technical College & Ohio State Newark

*How confident are you that your institution is compliant with the many consumer information requirements? Consumer Information is required to be on your website, in publications and shared with current and prospective students. Together we will discuss some of the key components of consumer information and who is responsible to share and notify.*

- Leadership Class (invitation only)

**5:00pm – 6:00pm**

Presidents Reception

Dinner on your own (restaurant suggestions at registration desk)



## Friday, October 26, 2018

7:30am – 10:00am

Registration Open

7:30am – 8:30am

Coffee, Tea, and Juice with Seasonal Fresh fruit & Yogurt Parfaits

### Interest Session

8:30am – 9:20am

- Looking Back and Moving Forward: A Review of Pell Recalculations

Presenter: **Zack Goodwin**, U.S. Department of Education

Moderator: **Ashley Eder**, DeVry Education Group

*When must Pell Grant awards be recalculated? When may they be? In this session we will review required and optional recalculations, including Pell Recalculation Dates (PRDs), and how these relate to course adds, drops and withdrawals.*

- All of Us Use It, Some of Us Hate: It Beyond Basics Excel

Presenter: **Brittany Wilson**, Hondros College of Nursing

Moderator: **Mary Cannon**, Hondros College of Nursing

*We all have to use Excel! This session will take you beyond just basics and give you tools you can use immediately.*

- HEI Training System

Presenter: **Tamika Braswell**, Ohio Department of Higher Education; **Ramah Church**, Ohio Department of Higher Education; **Lisa Reed**, Ohio Department of Higher Education;

Moderator: **Tamika Braswell**, Ohio Department of Higher Education

*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 Orphan's Scholarship (WOS) in the new HEI System for viewing queries, file submissions, and more.*

- Session TBD

9:30am – 10:20am

- Communication Channel Effectiveness- Channel Specific Messaging

Presenter:

Moderator: **Heidi Sisson**, Cognition Financial

*Communicating with students today sure is different than in the past. Consistent and concise communication is critical when it comes to reaching student with important financial information. But timing and frequency play a critical role as well. A single simple direct email may not be enough to get the job done. See how channel specific messages can be used to help students differentiate between important "need to know" information and a call to action.*

- Building a Structure around a Student on SAP Restriction

Presenter: **Marcus Jackson**, Columbus State Community College

Moderator: **Jenn Toomey**, Case Western Reserve University

*Financial Aid often has access to information that impedes student success. Though we have the information, we rarely are in the situation to use that information to help students succeed in obtaining their degree. Our presenter(s) will discuss how their institution works collaboratively to foster student success when they are on SAP restriction.*

**Friday, October 26, 2018 – Continued**

- Foolproof Organization Tips For Your Financial Aid Office

Presenter: **Daniel Gonzales**, CampusLogic

Moderator: **John Brown**, Capital University

*Are the things taking up the majority of your time in the financial aid office the most important for reaching your institutions goals? Learn foolproof tips to help you organize around student need, your institution's strategic goals, and optimal efficiency.*

*In this session, we'll discuss:*

- *Organizing basics key to financial aid*
- *How to audit & refine your current organization strategy*
- *Using data to analyze and track success*

*Join our session and learn what your Financial Aid Office's biggest hurdle is – and no, it's not time – and how to solve it.*

- FICO Research: Financial Literacy Efforts that Have Had Proven Results

Presenter: **Jeff Johnston**, Sallie Mae

Moderator: **Carrie Short**, University of Akron

*Increasing financial knowledge and equipping individuals with tools to make better financial decisions is on the forefront of financial education. Learn how a recent multi-year field experiment demonstrated that viewing a FICO Score influences and promotes positive financial behaviors. Attendees will also get a review on how to talk to students about building a positive credit record and FICO score.*

- Leadership Class (invitation only)

10:20 – 10:45 am

**Check out of hotel/Break**

10:45am – 1:30pm

Brunch

General Session –Keynote Speaker- Federal Update- Zack Goodwin

