

*Beyond Boundaries – Unleashing Potential*  
2019 CASFAA Conference  
Riverside Convention Center  
Riverside, CA  
November 3-5, 2019

Program Draft  
(Sessions are subject to change)

**Pre-Conference**

**Saturday, November 2, 2019 – 8:00 AM – 12:00 PM**

UC Financial Aid Directors Meeting – Meeting Room 9, Upper Concourse

**Saturday, November 2, 2019 – 9:00 AM – 5:00 PM**

Proprietary School Training – Raincross F, Upper Concourse

**Saturday, November 2, 2019 – 1:00 PM – 5:00 PM**

WASFAA/NASFAA U Training – Raincross C, Upper Concourse  
Topics: TBD

Speakers:

Leadership Forum – Meeting Room 7/8, Upper Concourse

**Sunday, November 3, 2019 – 8:30 AM – 11:30 AM (Times may vary)**

Community College Breakfast

CSU Segmental Breakfast

UC Segmental Breakfast

Independent Schools Segmental Breakfast

Graduate and Professional Schools Breakfast – Raincross B, Upper Concourse

**Sunday, November 3, 2019 – 8:30 AM – 11:30**

Proprietary School Breakfast/Training –

**Sunday, November 3, 2019 – 11:00 AM - Noon**

**Exhibit Hall Open – Exhibit Hall C/D, Upper Concourse**

**Sunday, November 3, 2019 – 12:00 AM – 12:45 PM**

**Newcomers Welcome – Meeting Room 4/5, Lower Concourse**

## **Main Conference**

**Sunday, November 3, 2019 – 1:00 PM – 2:30 PM**

**Opening Session – Exhibit Hall A/B, Upper Concourse**

- Welcome to *Beyond Boundaries – Unleashing Potential*, CASFAA Conference 2019
- NASFAA – Association Update with (?), NASFAA National Chair
- NASFAA – Federal Update with Justin Draeger, NASFAA President & CEO
- WASFAA Update with Scott Cline, WASFAA President

**Sunday, November 3, 2019 – 2:15 – 4:30 PM**

**Exhibit Hall Open – Exhibit Hall C/D, Upper Concourse**

**Sunday, November 3, 2019 – 2:30 – 3:00 PM**

**Visit with Exhibitors – Exhibit Hall C/D, Upper Concourse**

**Sunday, November 3, 2019 – 3:00 – 4:00 PM**

**Interest Sessions – Group A**

**Session A1 – Ballroom A/B, Lower Concourse**

### **Verification 2020-21**

This session will highlight the changes to the verification process for the 2020-21 award year. This session will include an overview of regulatory changes, documentation requirements, as well as verification reminders to ensure accurate processing.

Moderator: [Victoria Mavricakis, Monterey Peninsula College](#)

Speaker: [Virginia Hagins, US Department of Education](#)

**Session A2 – Meeting Room 4/5, Lower Concourse**

### **California Dream Act Application and California Nonresident Tuition Exemption (Commonly Known as AB 540)**

Which financial aid application should your students complete? Are U.S. Visa holders eligible to complete the Dream Act Application (CADAA)? What is the Selective Service registration process for CADAA applicants? What if a Dreamer completes FAFSA in error? The answer to these questions and many more will be explained during this session. Attendees will receive an

overview of the various eligibility components for the California Dream Act application, including AB 540, AB 2000 and SB 68, as well as a summary of the changes to the 2020-21 application.

Moderator: Kathy Medina, Chabot College

Speaker: Jon Waldrep, California Student Aid Commission

### **Session A3 – Meeting Room 1, Lower Concourse**

#### **Scholar Retention Program: Supporting Students Through Their Re-entry Journey**

Students who have been academically dismissed from their university face unique challenges as they navigate their pursuit of reinstatement. The Scholar Retention Program provides holistic financial, advising and personal support for students who are committed to pursuing their educational goals. This session will discuss the implementation of the program along with retention and re-entry results.

Moderator: Gina Browne, California Community Colleges Chancellor's Office

Speakers: Natalie Gonzalez, University of California, Santa Barbara

Jennifer Leon, University of California, Santa Barbara

### **Session A4 – Meeting Room 2, Lower Concourse**

#### **Public Service Loan Forgiveness Updates**

The PSLF Program has been on the books for about 10 years now, long enough for some borrowers to start to qualify for actual loan forgiveness. And while there is much discussion about it, with the new administration, ED hasn't (can't) share much. Will there be changes? Come to this session to learn updates (if any) regarding the program and how they may impact your students.

Moderator: Patrick Cayabyab, Palo Alto University

Speakers: Vicki Shipley, NCHER

Jessica Ayres, Palo Alto University

### **Session A5 – Raincross C/F, Upper Concourse**

#### **What is the Correct Filing Status for a Taxpayer?**

Financial aid officers are not required to be tax experts, but they are expected to understand the Head of Household filing status – to a degree that exceeds the abilities of many tax preparers! This session will start with a model for determining the filing status that a taxpayer may use, with a focus on the head of household filing status. Confusing terms like “temporary absence” will be explained, as with a discussion of why this topic is so difficult for families.

Moderator: Landy Gonzalez-Hernandez, California State University, Stanislaus

Speaker: Robert Weinerman, Iron Bridge Resources

### **Session A6 – Raincross A, Upper Concourse**

#### **Financial Aid RoadMap: Advocacy & Best Practices for STEM and Undocumented Students**

FAFSA, Dream Act, Pell Grant, Cal Grant, California Promise Grant and Student Success Completion Grant - all financial aid terms that can be overwhelming for students but are crucial to student success and for community college students, timely transfer. In this session, we will discuss how to develop embedded financial aid advising via partnerships with academic programs such as STEM. We'll also discuss how to use technology and WebGrants to better assist students plan their SSCG and Cal Grant for transfer purposes.

Moderator: Deb Barker-Garcia, California Community Colleges Chancellor's Office  
Speaker: Maria Vaccaro, Santa Monica College

### **Session A7 – Raincross B, Upper Concourse**

#### **Navigating Change**

Change Navigator is a change process model that has been designed to help individuals accept and support change initiatives faster. This tool is a way of approaching organizational change that focuses on the emotions of the individuals whose buy-in and support are critical to a project's success.

Moderator: Jesse Marquez, Whittier College  
Speaker: Dr. Eric Rodriguez, Focus On Strengths Consulting

### **Session A8 – Raincross D, Upper Concourse**

#### **Understanding Credit**

This presentation is focused on all things credit, and is geared towards borrowers new to credit with a focus on student loans, auto loans and credit cards. It highlights credit basics, FICO Scores and their importance, credit reports, credit monitoring, credit knowledge and financial health tips. The session will also help you understand the components of a credit report and how to read it and tips on what to do to correct errors on the report. It will help you counsel students on the importance of establishing and maintaining a strong credit score.

Moderator: Carol Swenson, Ascendium Education Group  
Speaker: Thalassa Naylor, Sallie Mae

### **Session A9 – Raincross E, Upper Concourse**

**Disaster Strikes- How an Institution Prepares for and Responds to a Natural Disaster** Are you prepared for a disaster in your community? Disaster preparedness and response should be a continuous process that includes planning for action throughout the phases of disaster: Readiness, Response, Relief, Recovery and Review. These phases can move quickly or they can span several months or even years. Learn from the experiences of Butte College and Santa Rosa Jr. College as they worked through and continue to respond to the aftermath of the Camp Fire and Tubbs Fire.

Moderator: Greg Kerr, ECMC  
Speakers: Tamera Shinar, Butte-Glenn Community College  
Jana Cox, Santa Rosa Junior College

### **Session A10 – Meeting Room 7, Upper Concourse**

#### **Meet California's Leading AI Chatbot: Financial Aid Expert, Spanish Speaker and Equity Promoter at over 60 California Colleges**

Our presentation will cover student equity topics such as college readiness, housing and food insecurities, language barriers, financial challenges, & college adjustment. We will discuss ways in which the Ocelot Chatbot can be used to create more equity and expand access to all students through the financial aid lifecycle. And how easy it is to implement. We will share examples of student conversations, video applications, Spanish language communication, and text-nudging campaigns to drive engagement. Elizabeth Hilton, Director of Student Financial Services at Riverside City College, and Noelia Gonzalez, Director of Admissions & Financial Aid

at California State University, Stanislaus, will share stories of how these Chatbots have improved student access at their campuses. This Business Solutions Session is sponsored by Financial Aid TV/Ocelot.

Moderator: Christine Tangalakis, Glendale Community College  
Speakers: Nicholas Burrell, Ocelot  
Dianne Fulmer, Ocelot  
Noelia Gonzalez, California State University, Stanislaus  
Elizabeth Hilton, Riverside City College

**Session A11 – Meeting Room 8, Upper Concourse**  
**Funding Generation Z and Millennials**

We will explore the expectations and mindset of your Generation Z students and how their unique perspective impacts their buying choices. The session will also introduce you to CommonBond; how we align with the expectations and mindset of this distinct generation. We will also offer an open forum for discussion on what factors are most important to them, and how your office can align and adapt. This Business Solutions Session is sponsored by CommonBond.

Moderator: Thomas Le, New York Film Academy  
Speaker: Jeff Recker, CommonBond

**Sunday, November 3, 2019 – 4:00 – 4:30 PM**

**Visit With Vendors – Exhibit Hall C/D, Upper Concourse**

**Sunday, November 3, 2019 – 4:30 – 5:30 PM**

**Interest Sessions – Group B**

**Session B1 – Ballroom A/B, Lower Concourse**  
**SULA: Misunderstandings and Misreporting**

The Subsidized Usage Limit Applies (SULA) concepts have been in play for several years now. What happens when the limit kicks in or when the limit is exceeded? What are the consequences for the borrower? What are the consequences for the school? What and how do you count and track eligibility usage? We'll be covering these important topics and more!

Moderator: Jim Griffin, Sierra College  
Speaker: Virginia Hagins, US Department of Education

**Session B2 – Meeting Room 4/5**  
**Cal Grant Payments, Audits and Reconciliation**

This session discusses proper use of WebGrants payment and adjustment codes; school policies on payment timelines with respect to census/freeze dates; and provides payment scenarios designed to test your knowledge. We will also provide an overview of the audit process as well as proper reconciliation procedures - including how to utilize reports to identify

accounting discrepancies- and how the disbursements reported in WebGrants are audited during a compliance review.

Moderator: Chance Welch, New York Film Academy – Los Angeles  
Speakers: Adrian Slade, California Student Aid Commission  
Yvonne Hollingsworth, California Student Aid Commission

### **Session B3 – Meeting Room 1, Lower Concourse**

#### **Begin with the End: Managing Change in the Financial Aid Office**

As financial aid professionals we are faced with change all the time, be it staffing, information systems, regulations, or policies. Change is inevitable. "Transition" is the process of adapting to the change. In this workshop we will examine the phases of transition, different approaches for dealing with it, and creative ways to manage it both personally and with colleagues. We will have plenty of time for sharing our experiences and ideas too!

Moderator: Mary Jo Osborn, Wells Fargo Bank  
Speaker: Robin Bailey-Chen, Abraham Lincoln University

### **Session B4 – Meeting Room 2, Lower Concourse**

#### **Service Sanity**

Need to discover how to manage stress? Do you understand why problem solving is important? Want to find out how to say “no” in a positive way? How about how to make the physical setting more suitable for quality service? Join this session to explore ideas to improve service and see your office thrive!

Moderator: Kathy Palmer, California Lutheran University  
Speaker: Mark Gotsch, Professional Connect

### **Session B5 – Raincross C/F, Upper Concourse**

#### **Calculating the EFC**

Understanding the Expected Family Contribution (EFC) not only is essential in determining a student’s eligibility for need-based aid, but is critical in assisting students with professional judgment requests and helping you decide on what documentation to collect for verification. In this hands-on session, we’ll go through a high-level overview of the EFC and Federal Methodology formulas and spend the greater part of the session doing an EFC hand calculation using case study information. You’ll walk away with an understanding of when to use a 9-month vs. an alternate EFC and come to know the differences among the three federal methodology formulas.

Moderator: Brad Williams, College Options  
Speaker: Cheryl Hunt, CASFAA Life Member

### **Session B6 – Raincross A, Upper Concourse**

#### **California State Compliance ... Are You Ready?**

Financial Aid compliance with California State laws is challenging but CASFAA is here to help! The CASFAA Training Committee and State Issues Committee have teamed up to bring you an informational session on California laws that impact financial aid. We will discuss several recently passed bills that effect schools across the state, when they went into effect, their regulatory requirements and ways that campuses are working to become compliant. Included

will be information on the Shopping Sheet/Award Notification, Cal Grant Notifications, Tuition and Fee Waivers, Foster Youth, the California College Promise and Annual Loan Notification, and more. The Information is relevant for all school segments from public and private 4-year colleges to community colleges to the private for-profit institutions.

Moderator: Thalassa Naylor, Sallie Mae

Speaker: Bronwyn Garrison, University of California, Davis

### **Session B7 – Raincross B, Upper Concourse**

#### **Mistakes You're Making with Your P&Ps**

Let's be real: no one's Policies and Procedures are perfect. But you might have some key mistakes in your P&Ps and not even realize it. These errors can mean big problems for your students and staff, especially if discovered during an audit or federal program review. Learn about these key mistakes and discuss ways to fix them quickly.

Moderator: Lori Prince, University of San Francisco

Speaker: Mandy Sponholtz, NASFAA

### **Session B8 – Raincross D, Upper Concourse**

#### **Trends in Higher Education**

Higher education is constantly changing. With a new governor, changes in both state and national policy, increased demand for a college educated work force, changes in consumer behavior and changing demographics, how can you make sense of it all? Will recent high school graduates stay in California or go elsewhere? How does financial aid policy fit into the mix? And how can we look at all of these factors to create policies and outreach efforts that will support institutional goals? Come hear about some of the latest studies and trends in these areas and be ready to think about how you can bring this information back to your campus to influence your own policies.

Moderator: Dennis Schroeder, Los Angeles Mission College

Speakers: Ciel Senechal, College Ave Student Loans

### **Session B9 – Raincross E, Upper Concourse**

#### **State Authorization, Borrower Defense and Gainful Employment**

The U.S Department of Education is currently working to implement an extraordinarily ambitious regulatory agenda. ED is deep into its efforts to delay, revise, or rescind a range of complex regulations formulated by the prior administration, to include the controversial "State Authorization Rule," the "Borrower Defense Rule," and the "Gainful Employment Rule." How might this all affect you and your school?

Moderator: Wendy Wang, Gemological Institute of America

Speaker: Aaron Lacey, Thompson Coburn, LLP

### **Session B10 – Meeting Room 7, Upper Concourse**

#### **Program Health Check: Are Your Students Thriving or Struggling?**

Your CDR is only a piece of the puzzle. Do you know how your programs are performing based on completion rates, how your students are handling their debt, and whether or not your school needs to boost successful programs? ECMC Solutions can provide you with this important data to gain insight on how to manage enrollment and devote resources based upon the repayment performance by program. In addition, we can pair this data with job market opportunities and

forecasts so you can better prepare tomorrow's students so they can thrive. This Business Solutions Session is sponsored by ECMC.

Moderator: Charles Conn, Cal Poly Pomona  
Speaker: Greg Kerr, ECMC

**Session B11 – Meeting Room 8, Upper Concourse**  
**How Financially Prepared are Gen Z Students for the School**

Join this session to hear how American college students used summer break 2019 to prepare for their financial commitments in the 2019-2020 school year, and the benefits of a non-cosigned loan option for these students. This Business Solutions Session is sponsored by Ascent Student Loans.

Moderator: Thomas Le, New York Film Academy  
Speaker: Dennis Wentworth, Ascent Student Loans

**Sunday, November 3, 2019 – 5:30 PM – 6:45 PM**

**Exhibitor Reception – Exhibit Hall C/D, Upper Concourse**

**Dinner on your own**

**Monday, November 4, 2019 – 8:00 AM – 10:00 AM**

**Breakfast and Morning General Session – Exhibit Hall A/B, Upper Concourse**

Keynote: Diversity, Equity and Inclusion on the American Campus  
Speaker: Mariam Lam, Ph.D. – Associate Vice Chancellor for Diversity & Inclusion  
University of California, Riverside

**Monday, November 4, 2019 – 10:00 AM – 11:45 AM**

**Exhibit Hall Open – Exhibit Hall C/D, Upper Concourse**

**Monday, November 4, 2019 – 10:15 – 11:15 AM**

**Interest Sessions – Group C**

**Session C1 – Ballroom A/B, Lower Concourse**

**Administering Disbursements**

In this session we will discuss various aspects of properly disbursing Title IV funds including Title IV credit balances, early and late disbursements, post-withdrawal disbursements, and retroactive disbursements. In addition, we will review G5 drawdowns, G5 and COD interactions, and timely and accurate system reporting. We will also provide information regarding how to disburse or return funds if improper payments occur or if a student regains eligibility.

Moderator: Jennifer Achan, Bakersfield College  
Speaker: Virginia Hagins, US Department of Education

**Session C2 – Meeting Room 4/5, Lower Concourse**



### **Navigating CSAC WebGrants System**

This session will provide an overview of the WebGrants system and will cover topics ranging from how to create a WebGrants account to customizing a roster and everything in between. Attendees are encouraged to bring a laptop to this session. Various hands-on exercises will allow attendees to begin applying concepts into practice

Moderator: Rivka Weinberg, Touro College Los Angeles  
Speaker: Jon Waldrep, California Student Aid Commission

### **Session C3 – Meeting Room 1, Lower Concourse** **How Riverside County Builds Bridges for Access**

Riverside County has been highlighted in various state and national publications for their effectiveness for closing the access gap among our various underrepresented student groups. How are these efforts at the K-12 level determined and implemented? Come hear from leadership on how they collaborate in setting and implementing access priorities, such as the Race to Submit (financial aid application competition), how these efforts have made them a model for increasing access, and what we can do as financial aid administrators to strengthen our partnership.

Moderator: Apri Medina, University of California, Santa Cruz  
Speakers: Angelov Farooq, Riverside Board of Education  
Catalina Cifuentes, Riverside County Office of Education

### **Session C4 – Meeting Room 2, Lower Concourse** **Accreditation and Innovation**

The U.S Department of Education is working to finalize the Accreditation and Innovation rule, and to promulgate the first significant rule under Title IX in forty years. We expect to see final versions of the State Authorization Rule, the Borrower Defense Rule, and elements of the Accreditation and Innovation Rule in September or October.

Moderator: Michael Doman, Ascendium Education  
Speaker: Aaron Lacey, Thompson Coburn, LLP

### **Session C5 – Raincross C/F, Upper Concourse** **IRS – FAFSA Marital Status Mismatches**

The IRS and Department of Education define marriage differently, and use a different moment in time to define marital relationships. Financial aid officers may need to combine incomes from individual tax returns – or extract a single person's information from a joint tax return, as a result. This webinar will look at the guidance that the Department of Education has provided related to marital status mismatches, including how to combine incomes, how to separate incomes, and what information schools need to have on file to complete these processes correctly.

Moderator: Gina Browne, California Community Colleges Chancellor's Office  
Speaker: Robert Weinerman, Iron Bridge Resources

### **Session C6 – Raincross A, Upper Concourse** **Diversity, Equity and Inclusion on the American Campus**

Diversity, Equity and Inclusion - perhaps you've heard of it; perhaps not. Regardless, it's a concept that is growing on college campuses nationwide. What is it? Why is it

important? What issues does it address and in what areas of campus life? Who does it target and what do the efforts look like? How can your college and community benefit? Join this follow-up to Mariam's keynote presentation to find out more what the University of California is doing to make for a welcoming campus culture, and how you can do the same!

Moderator: Sarah Davis, University of San Diego  
Speaker: Mariam Lam, University of California, Riverside

### **Session C7 – Raincross B, Upper Concourse**

#### **Assessing Your Financial Aid Career Path**

Ready to take the next step in your career? Not sure what your next step is? Feel like you're wandering around looking for that golden piece of advice that'll open the next door? What are your future bosses and employers looking for in their leadership teams? Join in this interactive panel session with experienced colleagues who have worked in a diverse set of institutions—two-year, four-year, graduate, public and private—who can provide guidance on building your Financial Aid career path. You'll come away with a game plan about what you want to do next!

Moderator: Kim McNealy, Ascent Student Loans  
Speakers: Anita Kermes, California State University, Sacramento  
Wendy Wang, Gemological Institute of America  
Greg Kerr, ECMC  
Deborah Agee, University of California, Davis  
Rhonda Mohr, California Community Colleges Chancellor's Office

### **Session C8 – Raincross D, Upper Concourse**

#### **Preventing Data Breaches and Identity Theft**

Colleges and Universities continue to be prime targets for data breaches. With the nature of higher education institution's open data environment and budget restrictions, it can be difficult to identify and protect against data breach threats. Join us to learn what colleges and universities can do to address cyber threats and review data breach risk assessment.

Moderator: Ruby Nieto, California Community Colleges Chancellor's Office  
Speaker: Sun Ow, CASFAA Life Member

### **Session C9 – Raincross E, Upper Concourse**

#### **VA Update: The Approval Process and Compliance Survey Training Workshop**

The U.S. Department of Veterans Affairs (VA) offers this training workshop to help schools better understand and navigate the approval process. Workshop training will also cover: The responsibility for maintaining a current approval, the potential impact of an outdated approval, renewal process, common errors in submission of an application and the new application submission process and the annual Compliance Surveys.

Moderator: Diana Neal, Baldy View Regional Occupational Program  
Speakers: Wayne Boettcher, U.S. Department of Veterans Affairs  
Albert Plimpton, U.S. Department of Veterans Affairs

### **Session C10 – Meeting Room 7, Upper Concourse**

#### **WIIFY: NASFAA Business Services**

WIIFY: What's In It For You? That's what NASFAA Business Services is all about: customizing services to meet the needs of your school. NASFAA's Standards of Excellence Review Program

and Blue Icon Advisors, NASFAA Consulting provide assistance to schools at every level, from working with your policies and procedures and training new employees to providing leadership support and full-scale compliance and operational evaluations. Attend this session to hear results from our clients and generate your own ideas for how NASFAA Business Services can help you! This Business Solutions Session is sponsored by NASFAA.

Moderator: Mike Dear, MiraCosta College

Speaker: Mandy Sponholtz, NASFAA

### **Session C11 – Meeting Room 8, Upper Concourse**

#### **Loan Repayment Strategies: Is Refinance Right for your Students?**

Students graduating with multiple loans have a lot of questions about repayment. What is the ideal student loan repayment option? Should I consolidate or refinance? If I do refinance, should I go with a fixed or variable rate? Will I qualify? How much debt will I end up with? And the answer is....it depends. Come and learn about repayment details for federal and private loans, the information students should consider when determining whether or not to refinance, and the details of how to go about it. This Business Solutions Session is sponsored by College Ave Student Loans.

Moderator: Melissa Dick, California Baptist University

Speaker: Brian Reed, College Ave Student Loans

### **Monday, November 4, 2019 – 11:15 – 11:45**

**Visit with Exhibitors – Exhibit Hall C/D, Upper Concourse**

### **Monday, November 4, 2019 – 11:45 – 1:15 PM**

**Lunch – Exhibit Hall A/B, Upper Concourse**

#### **CSAC Update –**

The CSAC team will provide updates on the Commission's programs, the SEARS Survey, and the Grant Delivery Modernization Project. We will also provide an overview of the report Expanding Opportunity, Reducing Debt: Reforming California Student Aid by The Century Foundation and will present the Commission's plans towards consolidating the Cal Grant program.

**Speaker –** Marlene L Garcia, Executive Director, California Student Aid Commission

### **Monday, November 4, 2019 – 1:15 – 4:30 PM**

**Exhibit Hall Open – Exhibit Hall C/D, Upper Concourse**

### **Monday, November 4, 2019 – 1:30 – 2:30 PM**

**Interest Sessions – Group D**

**Session D1 – Ballroom A/B, Lower Concourse**

**Administering Adds, Drops and Withdrawals**

This session will address the administration of Title IV funds when a student adds or drops courses as well as student withdrawals (excluding R2T4 calculation). Discussion and case scenarios will be provided concerning Recalculation Rules and Census Dates in various situations. Also, this session will provide an in-depth explanation concerning student withdrawals on such topics as Schools Required to Take Attendance vs. Schools Not Required to Take Attendance, Official and Unofficial Withdrawals, Dates of Determination and Deadlines, and an overview of Enrollment Reporting Requirements.

Moderator: Ione Jackson, California Baptist University  
Speaker: Virginia Hagins, US Department of Education

### **Session D2 – Meeting Room 4/5, Lower Concourse**

#### **Middle Class Scholarship Basics**

This session is applicable to CSUs, UCs, and CCCs that participate in the Baccalaureate pilot program, and will cover the information and procedures schools need to administer the Middle-Class Scholarship program. We will cover student eligibility, payment and correction guidelines as well as a detailed explanation of the Middle-Class Scholarship roster.

Moderator: Jennifer Achan, Bakersfield College  
Speaker: Adrian Slade, California Student Aid Commission

### **Session D3 – Meeting Room 1, Lower Concourse**

#### **Basic Needs and Student Success**

Come learn about basic needs support programs. This session will highlight the work of UC Santa Barbara's Financial Crisis Response Team, Meal Voucher Program, Housing Voucher Program and more!

Moderator: Dianne Fulmer, Ocelot  
Speakers: Saul Quiroz, University of California, Santa Barbara  
Rebecca Plotkin, University of California, Santa Barbara

### **Session D4 – Meeting Room 2, Lower Concourse**

#### **Developing a Financial Literacy and Debt Management Program**

Starting a Financial Literacy and Debt Management Program can be daunting, but you can do it! This session will discuss steps to start a successful and engaging program, including some of the possible challenges and available resources. What has worked and what hasn't? Bring your ideas and add to the conversation!

Moderator: Juliana Rosa, California State University, Stanislaus  
Speakers: Landy Gonzalez-Hernandez, California State University, Stanislaus  
Julie Carroll, California State University, Sacramento

### **Session D5 – Raincross C/F, Upper Concourse**

#### **Introduction to the 2018 Tax Forms**

Have you begun to collect 2018 tax returns as documentation for your income-adjustment professional judgments? Are you baffled by what you are seeing? The IRS introduced a radically redesigned Form 1040 and six new numbered schedules in 2018 – and financial aid may never be the same. In this session, participants will learn about the changes implemented in the tax forms in 2018 – including where to find all the figures required on the FAFSA, on and

off-form calculations that have been introduced, and the forms you just don't need to worry about.

Moderator: Sarah Davis, University of San Diego  
Speaker: Robert Weirnerman, Iron Bridge Resources

**Session D6 – Raincross A, Upper Concourse**  
**Increasing California Dream Act Awards for Undocumented Students**

This presentation will provide financial aid counselors with information, resources and best practices to support undocumented students achieve their academic goals. Participants will increase their awareness of how to remove roadblocks to successful financial aid distribution through the California Dream Act and promote an increase in the disbursement of CA Dream Act aid for students at your school. Additionally, promising institutional practices for financial aid counselors from local schools will be elevated.

Moderator: Kathy Palmer, California Lutheran University  
Speaker: Nancy Jodaitis, Immigrants Rising

**Session D7 – Raincross B, Upper Concourse**  
**Reaching Students Where They Are - GenZ and Beyond**

What comes after GenZ? Many of us are still reacting or preparing for GenZ, and they are already on your campus. How about the next generation? What about staying in tune with older generations? Come find out what changes you should be making to best interact with this group, and how we may be able to prepare for the group coming up behind them. This interactive session requires your participation, so bring your smart phone and be ready to share best practices with your colleagues. There is also a break-out by generation mid-way through the session, so don't plant yourself in one seat and expect to stay there.

Moderator: Casey Miller, Ascent Student Loans  
Speaker: Rob Smith, ELM Resources

**Session D8 – Raincross D, Upper Concourse**  
**Internal and External Threats Facing Title IV Institutions**

Special agents from the Office of Inspector General (OIG) will discuss internal and external financial aid fraud and cyber security threats currently facing institutions of higher education. The presenters will discuss real case examples of these threats, and how OIG's investigative mission to combat fraud and abuse in federal student aid programs can help your organization safeguard those programs by identifying and detecting fraud. The presenters will illustrate complex and common fraud schemes, brief you on indicators that can help you detect internal and external fraud, discuss the criminal and civil remedies sought by the OIG, and inform you concerning how to report potential fraud to the OIG. A question and answer period is planned as part of this presentation.

Moderator: Cora Manuel, Pacific School of Religion  
Speakers: Adam Shanedling, US Department of Education  
Chris Hodge, US Department of Education

**Session D9 – Raincross E, Upper Concourse**  
**Financial Literacy –Not Just Checking the Box**

The goal of providing financial education should be to educate and inform and to help those you are counseling lead more financially successful lives. Sometimes, providing this information is simply to “check the box” to show you’re making the information available. If you lack time and resources but want to make your efforts count, we will share some ways to engage and inform those you’re trying to reach and to maximize your investment.

Moderator: Kathleen Clark, Chapman University

Speaker: Tom Bailey, ECMC

### **Session D10 – Meeting Room 7, Upper Concourse**

#### **Trends in Student Loan Refinancing**

It is estimated that Student loan refinancing is a \$15B market annually. Join Luna Federici, head of SoFi’s Student Loan Refinancing business line, as she discusses key borrower trends, market nuances, and the upside of student loan refinancing in a declining interest rate market. This session will also touch on the various products available in the market today as well as tips on how you can advise your graduating population on the best fit for their individual financial situation. This Business Solutions Session is sponsored by SoFi.

Moderator: Kim Thomas, SoFi

Speaker: Luna Federici, SoFi

### **Session D11 – Meeting Room 8, Upper Concourse**

#### **KHEAA Verify: the 3rd Party Solution**

KHEAA Verify provides a web based portal for student & families to complete verification requirements, while our staff in Kentucky actually performs the verification function for your school by making any changes and meeting all federal minimum standards. Additionally, we tailor the process to meet your institution’s verification policy with a dedicated staff. Verification will no longer be viewed as an institutional hurdle to enrollment success, and your staff will be seen in a new light by some of your most frequent customers! This Business Solutions Session is sponsored by Kentucky Higher Education Assistance Agency.

Moderator: Charles Conn, Cal Poly Pomona

Speaker: Sean McGivney, KHEAA

### **Monday, November 4, 2019 – 2:30 – 3:00 PM**

**Visit with Exhibitors – Exhibit Hall C/D, Upper Concourse**

### **Monday, November 4, 2019 – 3:00 – 4:00 PM**

**Interest Sessions – Group E**

### **Session E1 – Ballroom A/B, Lower Concourse**

#### **Return of Title IV (R2T4) Funds: Essential Concepts**

Whether you're just learning R2T4, looking for a refresher or just want to confirm you're doing it right, this session is for you. We'll cover basic principles, how the calculation works, returning funds and post withdrawal disbursements, and so much more. This session will likely run more than the 60 minutes, so be ready to stay! You won't regret it!

Moderator: Mike Dear, MiraCosta College

Speaker: Virginia Hagins, US Department of Education

**Session E2 – Meeting Room 4/5, Lower Concourse**  
**Cal Grant Delivery System Modernization Project**

This session will provide an overview of the Grant Delivery System Project and will cover topics ranging from the features and compatibility of the system, how the fully integrated system will work, and how it will interact in real time for institutions and students.

Moderator: Rivka Weinberg, Touro College Los Angeles  
Speaker: Gurinder Bains, California Student Aid Commission

**Session E3 – Meeting Room 1, Lower Concourse**  
**Pay No Attention to the Regulation Behind the Curtain: R2T4 and Student Time to Degree**

As aid administrators we are tasked with managing numerous regulations as stewards of federal funds. However, some of you may be curious to understand how these policies affect our students. Come join a talk on research done with UC Santa Cruz students and the Return to Title IV Policy. Just how does R2T4 policy affect withdrawals and time to degree?

Moderator: Jessica Ayres, Palo Alto University  
Speaker: Apri Medina, University of California, Santa Cruz

**Session E4 – Meeting Room 2, Lower Concourse**  
**Managing Time – 24 Hours and Counting**

Who is responsible for managing your time? Yes, it's you. Can you use some help? Join this session to explore four key steps to help manage time. Learn how to prioritize projects and tasks. Find out how to deal with external distractions and identify steps to help with crisis time management. You'll like the new you!

Moderator: Kathleen Clark, Chapman University  
Speaker: Mark Gotsch, Professional Connect

**Session E5 – Raincross C/F, Upper Concourse**  
**Tax Transcript Decoder**

FAFSA instructions direct applicants to obtain information from certain lines on IRS income tax returns, which differ based on whether the tax filer completed a Form 1040, 1040A or 1040EZ. For the most part, the instructions identify the relevant lines on the tax return by line number. These line item numbers do not appear on IRS tax transcripts. Join this session for a lively review of a very useful tool to help navigate your way through tax returns and transcripts.

Moderator: Cora Manuel, Pacific School of Religion  
Speaker: Cheryl Hunt, CASFAA Life Member

**Session E6 – Raincross A, Upper Concourse**  
**Financial Aid Liaisons for Underrepresented Students**

The session will cover the importance of close collaboration and involvement of Financial Aid Officers with student services programs for underrepresented student populations such as PUENTE, UMOJA, DREAMERS. We'll discuss the role of a Financial Aid Liaison, how to incorporate financial literacy as part of the activities of the programs, and the benefits of having Financial Aid Liaisons for student retention strategies.

Moderator: Victoria Mavricakis, Monterey Peninsula College  
Speakers: Nadia Almaguer, Grossmont College  
Michele Toral, Grossmont College

**Session E7 – Raincross B, Upper Concourse**  
**10 Common Questions Schools Have About Federal Program Reviews**

The U.S. Department of Education (ED) performs program reviews to identify whether a school is abiding by the provisions governing Title IV aid programs, and if not, ED can impose hefty financial fines and liabilities against the school. This danger of financial ramifications may lead schools to fear program reviews, but you don't have to. Learn about the types of reviews, potential triggers for being selected for a review, the financial ramifications, and more.

Moderator: Crystal Delong, Citizens One Student Loans  
Speakers: Mandy Sponholtz, NASFAA  
Deborah Agee, University of California, Davis

**Session E8 – Raincross D, Upper Concourse**  
**The Care and Feeding of Your Career**

Who is responsible for your career? Where do you begin to assess what you want and need? What should you do now? Is it time to make a move? How do you go about moving on? Do you need to network? Join us for this informative session to help you take stock of your career and make a plan to take it to the next level.

Moderator: Michelle Bowman, Sixup  
Speaker: Ciel Senechal, College Ave Student Loans

**Session E9 – Raincross E, Upper Concourse**  
**Financial Aid & Enrollment Services - The Force Is Real**

Enrollment down? Students being dropped for non-payment? Need a solution? Join this session to hear how Golden West College evaluated the causes and effects, and what steps we took to join forces between Enrollment Services and Financial Aid to address the issues. We'll share how we were able to decrease student drops and increase financial aid completion.

Moderator: Lori Prince, University of San Francisco  
Speakers: Adrienne Burton, Golden West College  
Ava Burns, Golden West College

**Session E10 – Meeting Room 7, Upper Concourse**  
**Possible BSS for Earnest**

Moderator: Paul Gilroy, ProEducation Solutions  
Speakers: TBD

**Session E11 – Meeting Room 8, Upper Concourse**  
**7 Weird Ways Students Are Paying for School**

Where do your students turn when they have unexpected higher education bills they can't pay? Many drop out, taking debt with them but no degree. While others turn to part-time jobs and side hustles, the truth can be scarier (and sometimes funnier) than you realize: many are turning to weird, wacky ways to raise a few bucks. With 55% of students reporting they've run out of



money three or more times in the past year, it's no wonder they're getting creative—and sometimes turning to questionable methods. From selling body parts (eek!) to entering eating contests, join this session to learn about seven weird ways students are paying for school, the potential wins and risks associated with them, and innovative, safe alternatives in use at schools nationwide. This Business Solutions Session is sponsored by CampusLogic.

Moderator: Dennis Wentworth, Ascent Student Loans  
Speakers: Misty Sabouneh, CampusLogic  
Kurt Vesecky, CampusLogic

### **Monday, November 4, 2019 – 4:00 – 4:30 PM**

**Visit with Exhibitors – Exhibit Hall C/D, Upper Concourse**

### **Monday, November 4, 2019 – 4:30 – 5:30 PM**

**Interest Sessions – Group F**

#### **Session F1 – Ballroom A/B, Lower Concourse** **A Guide to Year-Round Federal Pell Grants**

Come and hear an overview of the provisions governing year-round Federal Pell Grants. This session will include a discussion of unchanged rules, changed rules, policy examples and the operational aspects of year-round Pell.

Moderator: Carl Gottbrecht, Stanford University  
Speaker: Virginia Hagins, US Department of Education

#### **Session F2 – Meeting Room 4/5, Lower Concourse** **Chafee Grant for Foster Youth**

This session will provide an overview of the Chafee Grant and will cover topics ranging from the features of the Chafee grant and new parameters that have been added for the 2019-2020 academic year. Additionally, we will be discussing the expanded eligibility for foster youth offered with some of our programs.

Moderator: Kathy Medina, Chabot College  
Speaker: Yvonne Hollingsworth, California Student Aid Commission

#### **Session F3 – Meeting Room 1, Lower Concourse** **Scholarships, Regulations and Best Practices**

This session will cover best practices in the administration of campus scholarship programs. Presenters will discuss federal and state regulations that impact scholarship management at public institutions in California and review ways to reduce institutional liability. Recommendations for working with single scholarship selection committees and tips on processing a shared application form will be covered. Additional highlights include scholarships publicity, coordinating scholarships by nomination, and making recommendations on scholarship eligibility criteria.

Moderator: Nick Valdivia, California State University, Long Beach  
Speakers: Desiree Marquez, Mt. San Antonio College  
Teresa Pham, Mt. San Antonio College

**Session F4 – Meeting Room 2, Lower Concourse**  
**Session Cancelled**

**Session F5 – Raincross C/F, Upper Concourse**  
**How the New Tax Code is Impacting Financial Aid**

Most of the changes to the tax code enacted in December, 2017, were implemented in the 2018 tax year. And financial aid officers will begin to see these changes as they review income-adjustment based professional judgments. This session will take a look at the changes that will most impact financial aid eligible families, and any guidance the Department of Education has issued related to these changes. Topics covered will include the new Form 1040, the elimination of Forms 1040A and 1040EZ and its impact on a student's eligibility for the simplified EFC or Auto Zero EFC formula, and how changes in the tax code may change students' EFCs, ability to finance their education, and meet their financial obligations to their schools.

Moderator: Brad Williams, College Options  
Speaker: Robert Weirnerman, Iron Bridge Resources

**Session F6 – Raincross A, Upper Concourse**  
**State Issues, State Legislature: How it Works and How to Work it**

As VP of State Issues, Bronwyn Garrison has a story to share. Advocacy in Sacramento is a combination of relationships, committees, well-crafted emails, and back-up plans. In this session, he talks about how to build successful advocacy campaigns, what may be lacking, and what can be done to assert you/our voice in the capitol. Come share your experiences too. Collectively, we'll learn more about the legislative process, ways to influence proposed bills, and do the best work when it comes to helping students finish school in the strongest financial position.

Moderator: Domanique Isabeau, California State University, Northridge  
Speaker: Bronwyn Garrison, University of California, Davis

**Session F7 – Raincross B, Upper Concourse**  
**StrengthsFinder Workshop Sponsored by Ascent Student Loans**

Based on Gallup's StrengthsFinder's research, this interactive workshop will help you identify and understand your own unique combination of talents to maximize personal effectiveness and performance and address strategies and challenges associated with developing in your role, as well as understanding the unique dynamics of your team's collective talents.

Moderator: Amy Gwilt, California Baptist University  
Speaker: Analia Mendez, University of California, San Diego

**Session F8 – Raincross D, Upper Concourse**  
**Success, Equity, and You - Making Connections Through Financial Aid**

The Financial Aid Office plays an important role in student success. We can be the bridges over the valleys for our students as they navigate the higher education experience. Learn how making connections can lead to student success.

Moderator: Sun Ow, CASFAA Lifetime Member  
Speaker: Karen Hunter, DeAnza College

**Session F9 – Raincross E, Upper Concourse**  
**Enrollment Management and Discounting**

Whether your institution has a large endowment or are tuition driven, many financial aid and enrollment professionals are balancing competing priorities when it comes to maintaining (let alone attempting to lower) the discount rate or maintaining the scholarship budget expenditures, while also trying to meet aggressive enrollment goals that are in line with the institutional mission. Because of having to balance the often-conflicting tradeoffs involved, it can be difficult to figure out what aid strategies will also best support enrollment from admissions to graduation. This session will discuss strategies and the critical roles financial aid offices play in developing financial aid strategies.

Moderator: Emily Valk, Occidental College  
Speakers: Mary Booker, University of San Francisco  
Ray Nault, College Aid Services

**Session F10 – Meeting Room 7, Upper Concourse**  
**Cohort Catalyst®: The Secret Sauce to Repayment Success**

This past year, we have helped 1.3 million borrowers avoid default and its distressing consequences and rehabilitated over 1.3 billion in student loans. These borrowers can now receive federal financial aid to return to school and they're on the path to improving their credit profiles. Cohort default rates dropped at their former schools without the burden of additional workloads. The secret sauce is Cohort Catalyst, our repayment support and default prevention services. With Cohort Catalyst, you'll receive data management, customized outreach, school reporting, and most importantly—the unique experience of our highly-skilled loan counseling team. To learn how Cohort Catalyst can get your borrowers back on track and help you meet and exceed your default management goals, register now to attend this session. This Business Solutions Session is sponsored by the Ascendium Education Group.

Moderator: Lawrence McGhee, TCS Education System  
Speakers: Carol Swenson, Ascendium Education Group  
Mike Doman, Ascendium Education Group

**Session F11 – Meeting Room 8, Upper Concourse**  
**Scholarship Management: Meeting the Needs of Institution Administrators While Streamlining the Process for Student Applicants**

Are your students missing out on scholarship opportunities? Are you ensuring fund utilization, ease of candidate identification, review, and awarding, including embracing departments in the process? Do you have a professional tool for students to express their appreciation to your donors? In this session, participants will see in action how Scholarship Manager can be your One Stop Scholarship Shop to automate and streamline your scholarship process, including examples of the value the solution is bringing to your peer institutions across the state. This Business Solutions Session is sponsored by Next Gen Web Solutions.

Moderator: TBD  
Speaker: Dianne Fanning, Next Gen Web Solutions

**Monday, November 4, 2019 – 6:30 – 10:30 PM**

Dinner, Dancing, Cocktails, Awards – **Exhibit Hall A/B, Upper Concourse**

**Tuesday, November 5, 2019 – 8:00 – 9:00 AM**

Breakfast and Business Meeting – **Exhibit Hall A/B, Upper Concourse**

**Tuesday, November 5, 2019 – 9:15 – 10:30 AM**

Federal Update – **Exhibit Hall A/B, Upper Concourse**

Speaker: Craig Munier, US Department of Education

**Tuesday, November 5, 2019 – 10:30 AM**

Final Comments & Adjourn – **Exhibit Hall A/B, Upper Concourse**

*See You Next Year!!  
October 24th-26th, 2020  
Santa Clara Marriott*