

Finding Your Voice
2017 CASFAA Conference
Monterey Marriott
Portola Hotel & Spa
October 29-31, 2017

Program Draft
(Sessions are subject to change)

Pre-Conference

Saturday, October 28, 2017 – 9:00 AM – 5:00 PM

Proprietary School Training – Bonsai I, Portola Hotel & Spa

Saturday, October 28, 2017 – 1:00 PM – 5:00 PM

Graduate/Professional Forum – Bonsai II, Portola Hotel & Spa

WASFAA NASFAA U Training – De Anza I, Portola Hotel & Spa
Topics: Student Eligibility and Cost of Attendance

Speakers: Sarah Everitt, Gonzaga University
Nicole McMillin, WASFAA Conference Committee Co-Chair

Sunday, October 29, 2017 – 8:00 AM – 11:45 AM (Times may vary)

Community College Breakfast – De Anza III, Portola Hotel & Spa

CSU Segmental Breakfast – De Anza II, Portola Hotel & Spa

UC Segmental Breakfast – De Anza I, Portola Hotel & Spa

Independent Schools Segmental Breakfast – Bonsai II, Portola Hotel & Spa

Sunday, October 29, 2017 – 9:00 AM – Noon

Proprietary School Breakfast/Training – Bonsai I, Portola Hotel & Spa

Sunday, October 29, 2017 – 11:00 AM – 12:00 PM

Exhibit Hall Open – San Carlos Ballroom, Monterey Marriott

Sunday, October 29, 2017 – 12:00 PM – 12:45 PM

Newcomers Welcome - Ferrante's Bay View, Monterey Marriott

Main Conference

Sunday, October 29, 2017 – 1:00 PM – 2:15 PM

Opening Session/Keynote Welcome to *Finding Your Voice*, CASFAA Conference 2017 – Golden State Theater (417 Alvarado Street)

Keynote – Ryan Smith, Executive Director – Education Trust-West

Sunday, October 29, 2017 – 2:00 – 6:45 PM

Exhibit Hall Open – San Carlos Ballroom, Monterey Marriott

Sunday, October 29, 2017 – 2:15 – 2:45 PM

Visit With Vendors – San Carlos Ballroom, Monterey Marriott

Sunday, October 29, 2017 – 2:45 – 4:00 PM

Session A1 – Ferrante’s Bay View (Monterey Marriott, 2nd Floor) 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: Bruce Honer, US Department of Education

Session A2 – Los Angeles (Monterey Marriott, Mezzanine Level) Dynamic Forms 8.0, The Next Wave in Electronic Forms Solutions

Implementing an electronic forms solution for the Financial Aid Office doesn't need to be complicated or expensive. Dynamic Forms enables schools to easily increase efficiencies in the verification process and all other financial aid form processes. Join this session to see how electronic signatures, data and images can be collected, posted, transferred and stored using batch or real time API processes. With a cutting-edge forms designer and expanded workflow capabilities, Dynamic Forms is more powerful than ever, enabling schools to implement electronic solutions they could only dream of before. This Business Solutions Seminar is sponsored by Next Gen Web Solutions.

Moderator: Lenny Akins, SixUp PBC, Inc.

Speaker: Monica Stam, Next Gen Web Solutions

Session A3 – Portola (Portola Hotel & Spa, Level 1) Communication Matters: Recognizing and Responding to Microaggressions

In our daily communication, we often don't think about the subliminal messages we send nor the nuances of how we say it. Nevertheless, they may reflect unspoken biases without intent. This presentation will define microaggressions, provide examples, explain their impacts and offer participants communication tools to effectively recognize and respond to microaggressions.

Moderator: Abril Hunt, Education Credit Management Corporation

Speakers: Teresa Maria Linda Scholz, University of California, Santa Cruz
Christy Byrd, University of California, Santa Cruz

Session A4 – Bonzai I (Portola Hotel & Spa, Level 1)

Trends and the Changing Landscape in Higher Education

This talk illustrates major trends and changes affecting financial aid and higher education, including changes in state support of postsecondary education, changes in high school GPA, student loan debt, graduation rates and college affordability. Generally, the trends are all getting worse. The data underscores the need for scholarships and grants to reduce the student debt burden, especially among low-income students.

Moderator: Mary Booker, University of San Francisco

Speaker: Mark Kantrowitz, Cappex.com LLC

Session A5 – Bonzai II (Portola Hotel & Spa, Level 1)

Increasing Undocumented Student Success As Financial Aid Counselors

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 roadblocks to successful financial aid distribution through the California Dream Act. Additionally, promising institutional practices for financial aid counselors from local schools will be elevated, to promote an increase in the disbursement of CA Dream Act aid for undocumented students at your school.

Moderator: Adrienne Garcia-Specht, Cal Poly San Luis Obispo

Speakers: Nancy Jodaitis, Educators for Fair Consideration
Rose Carmona-Arbulu, San Francisco State University

Session A6 – Redwood (Portola Hotel & Spa, Level 3)

Winning Workplace

Do you feel your work environment is lacking something but aren't sure exactly what? Defining your culture, being clear on your mission, and enjoying what you do are the guideposts to a winning workplace. Join in as we connect the cultures within your organization to create the productive workplace everyone wants. We'll discuss the dynamics of groups and teams, why team thinking is important, and making sure that culture and attitudes are aligned to support personal responsibility and workplace enjoyment.

Moderator: Alma Martinez Peraza, California State University, Monterey Bay

Speaker: Mark Gotsch, Professional Connect

Session A7 – Ironwood (Portola Hotel & Spa, Level 3)

Public Service Loan Forgiveness Updates

The PSLF Program has been on the books for almost 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. This session is sponsored by the CASFAA Grad Professional Committee.

Moderator: Julie Rehder, ELM Resources
Speakers: Vicki Shipley, National Council of Higher Education Resources
Julia Kalyayeva, The Wright Institute

**Session A8 – Cottonwood (Portola Hotel & Spa, Level 3)
Crafting Your Advocacy Message**

Do you see an issue that needs to be addressed, but don't know how to address it? Do you wish your students could be better served by state or federal laws and regulations? Have you wanted to contact or visit your legislator, but simply don't know how? Come learn the basics of crafting your message and reaching out so that you, too, can Find Your Voice!

Moderator: Apri Medina, University of California, Santa Cruz
Speaker: Daniel Reed, San Diego Christian College

Sunday, October 29, 2017 – 4:30 – 5:30 PM

**Session B1 – Ferrante's Bay View (Monterey Marriott, 2nd Floor)
2018-19 FOTW/DRT changes**

This session will highlight the 2018-19 changes to the FAFSA On The Web (FOTW) and Data Retrieval Tool (DRT). Understand what's new and what to expect when responding to students who have questions when completing the application process for the 2018-19 award year.

Moderator: Brian Heinemann, Copper Mountain Community College
Speaker: Bruce Honer, US Department of Education

**Session B2 – Los Angeles (Monterey Marriott, Mezzanine Level)
Innovative Alternative Loan Solutions**

In this session, we'll review emerging trends in financing higher education including parent/sponsor loans, risk sharing programs and income share agreements. This Business Solutions Seminar is sponsored by Goal Structured Solutions.

Moderator: Nichelle Williams, Antelope Valley College
Speakers: Dennis Wentworth, Goal Structured Solutions, Inc.
Leo Hertling, Purdue University

**Session B3 – Portola (Portola Hotel & Spa, Level 1)
Direct Loan Update**

What's a CASFAA Conference without a Direct Loan Update? This session will include reconciliation and some upcoming COD changes. You won't want to miss this one!

Moderator: Cora Manuel, Pacific School of Religion
Speaker: Chuck Hirman, US Department of Education

**Session B4 – Bonzai I (Portola Hotel & Spa, Level 1)
Five Ways Student Loans Impact Credit**

When your students borrow federal loans, do they understand the impact it will have on their credit profiles? The actions they take on their loans during repayment can affect whether they'll have a favorable or unfavorable credit history. Join us as we discuss five ways student loans impact credit and what borrowers can do to turn their debt into a major asset in building a good credit report. This session is sponsored by the CASFAA Grad Professional Committee.

Moderator: Kim Thomas, Cognition Financial
Speakers: Sun Ow, Great Lakes Higher Education Loan Services
Mandy de Jong, West Coast University

**Session B5 – Bonzai II (Portola Hotel & Spa, Level 1)
Serving the California Vet**

Veterans deserve our utmost thanks and support for their work in defending American values throughout the world. Join this session and hear from a specialist from the CalTAP program (Cal Vet) as he shares information on best practices, recommendations, VA Chapters, California state benefits, rate of pursuit, FAFSA usage along with VA education and Veteran Resource Centers. Let's make sure we support our veterans to the fullest!

Moderator: Thomas Le, New York Film Academy
Speaker: Leo Oblima, California Department of Veteran Affairs

**Session B6 – Redwood (Portola Hotel & Spa, Level 3)
EFC 101**

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: Colette Amin, Los Angeles Trade Technical College
Speaker: Cheryl Foster-Hunt, College Coach

**Session B7 – Ironwood (Portola Hotel & Spa, Level 3)
Default Prevention - Family Feud**

We all know default prevention is important to student success. However, there are so many moving parts to it that explaining it to students and staff can be overwhelming. We'll take the basics and turn it into an educational and fun forum, played like the game *Family Feud*. Our goal is to present new ways of discussing the key takeaways for default prevention while providing the audience with a fun session loaded with good information and laughs.

Moderator: Valerie Mull, Napa Valley College
Speakers: Greg Kerr, Education Credit Management Corporation
Rosemary Martinez-Kepford, Education Credit Management Corporation

**Session B8 – Cottonwood (Portola Hotel & Spa, Level 3)
State Issues, State Legislature: How it Works and How to Work it**

As VP of State Issues, Daniel Roddick 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: Ciel Senechal, College Ave Student Loans
Speaker: Daniel Roddick, University of California, San Francisco

Sunday, October 29, 2017 – 5:30 PM – 6:45 PM

Vendor Reception – San Carlos Ballroom, Monterey Marriott
Dinner on your own

Monday, October 30, 2017 – 8:00 AM – 10:00 AM

Breakfast and Morning General Session – De Anza Ballroom, Portola Hotel & Spa

Speakers: Helen Faith, 2017 WASFAA President
Lupita Cortez Alcala, Executive Director, California Student Aid Commission
Lejla Mavris, Global Majority

Monday, October 30, 2017 – 10:00 AM – Noon

Exhibit Hall Open - San Carlos Ballroom, Monterey Marriott

Monday, October 30, 2017 – 10:15 – 11:30 AM

Session C1 – Ferrante's Bay View (Monterey Marriott, 2nd Floor)
Cal Grant Payments and Reconciliation

This session will cover information on the payment and reconciliation process needed to administer the Cal Grant program. The payments section will cover disbursement of funds, reporting payments, payment/adjustment codes, payment/adjustment/refund policies, WebGrants reports and a review of some common payment scenarios. The reconciliation section will cover the reconciliation process, steps to accurate reconciliation and best practices.

Moderator: Lissa Wayne, New York Film Academy
Speakers: Dianne Alexander, California Student Aid Commission
Javier Argüello, California Student Aid Commission
Jon Waldrep, California Student Aid Commission

Session C2 – Los Angeles (Monterey Marriott, Mezzanine Level)
Game Changing Award Letters

Let's be honest, no matter how much time and effort you've put into creating the best award letter for students, the message may be getting lost in translation. And, it's not your fault. Student information systems limit what you can do to make an engaging and informative award letter. In this session, we'll discuss the biggest award letter challenges and how to solve them;

and how the right technology can simplify award letters for you and your students. Join our session and you'll learn how to create a game changing award letter that improves enrollment and reduces over borrowing. This Business Solutions Seminar is sponsored by CampusLogic.

Moderator: Sharon Chang, University of San Francisco
Speakers: Chris Jordan, CampusLogic
Tanisha Bradfield, Orange Coast College

Session C3 – Portola (Portola Hotel & Spa, Level 1) SULA Update

Now that SULA has been around for a while, some students may be tagged for loss of subsidized eligibility, further complicating their lives (think transfer students). Can you explain it to them? How do you assist them if they think there's an error? What are the ED procedures for getting corrections made? Join this session for a detailed discussion on this and other SULA-related issues. Fortunately for us, we have Chuck Hirman to help us keep it all straight!

Moderator: Diana Neal, Baldy View ROP
Speaker: Chuck Hirman, US Department of Education

Session C4 – Bonzai I (Portola Hotel & Spa, Level 1) Sending the Right Message

Words are just words. When strung together they can create concepts and ideas. But to really constitute effective communication, they need to be delivered the right way. In this discussion we'll look at communicating to connect and the benefits of connecting. How can tone of voice and body language be used as tools of communication? What does the environment and connections to staff mean to the student and their understanding and cooperation? How does all this relate to customer service?

Moderator: Leticia Herincx, High Desert Medical College
Speaker: Mark Gotsch, Professional Connect

Session C5 – Bonzai II (Portola Hotel & Spa, Level 1) One Letter, Big Results: Using Debt Letters to Encourage Smart Borrowing

Loan summaries, or debt letters, have taken the financial education world by storm. Some states are even making loan summaries a required step for colleges and universities. But are the letters working? What does a good loan summary look like? And how can institutions build resources around loan summaries to ensure success? This presentation will share the findings of Inceptia's latest research brief regarding loan summaries, examine preliminary results of institutional loan summary initiatives at three large universities, and offer suggestions and strategies for building a framework of resources to support responsible borrowing and repayment throughout the student lifecycle.

Moderator: Jessica Ayres, Palo Alto University
Speaker: Pat Robles-Friebert, Inceptia

Session C6 – Redwood (Portola Hotel & Spa, Level 3) How to Detect and Deter Federal Financial Aid Fraud

A special agent from the Office of Inspector General (OIG) will discuss the OIG's mission to combat fraud and abuse in federal student aid programs and what you can do to help safeguard those programs for your neediest students. The special agent 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 how you can report potential fraud to the OIG. The special agents will clarify what actions are taken by OIG as it pertains to fraud. Join this conversation with the Office of the Inspector General for a discussion on how to address fraud in federal student aid.

Moderator: Marilyn Faller, West Coast University

Speakers: Ivan Anthony, US Department of Education, Office of the Inspector General
Carleton Joy, US Department of Education, Office of the Inspector General

**Session C7 – Ironwood (Portola Hotel & Spa, Level 3)
Washington Update for Graduate and Professional Schools**

Graduate and Professional Schools face many of their own unique challenges. With the changes in the administration and a new Secretary of Education, what does the future hold for GP schools? Join these industry thought leaders and they share their views. This session is sponsored by the CASFAA Grad Professional Committee.

Moderator: Barbara Bickett, Adtalem Global Education

Speakers: Justin Draeger, NASFAA
Brett Lief, Windham Professionals

**Session C8 – Cottonwood (Portola Hotel & Spa, Level 3)
Return to Title IV Funds - Programs of Study Taught in Modules**

This session will focus on the Return of Title IV (R2T4) funds when a student withdraws from a program that is either taught within modules or has modules in the program.

Moderator: Wendy Wang, Gemological Institute of America

Speaker: Bruce Honer, US Department of Education

Monday, October 30, 2017 – 11:30 – 12:00

Visit With Vendors – San Carlos Ballroom, Monterey Marriott

Monday, October 30, 2017 – 12:00 – 1:15 PM

Lunch – De Anza Ballroom, Portola Hotel & Spa

Speaker: Justin Draeger, President, NASFAA

Monday, October 30, 2017 – 1:15 – 3:30 PM

Exhibit Hall Open - San Carlos Ballroom, Monterey Marriott

Monday, October 30, 2017 – 1:30 – 2:30 PM

**Session D1 – Ferrante’s Bay View (Monterey Marriott, 2nd Floor)
CSAC Update**

The CSAC management team will provide updates on the Commission’s programs, Senate Bill 70 data requirements, the 2017-21 Institutional Participation Agreement, 2018-19 California Dream Act Application, SEARS Survey and the Grant Delivery Modernization Project.

Moderator: Emily Valk, Occidental College
Speakers: Catalina Mistler, California Student Aid Commission
Tae Kang, California Student Aid Commission

Session D2 – Los Angeles (Monterey Marriott, Mezzanine Level)

Automating the Exchange and Management of Outside Scholarships

Come learn how ScholarNet for Scholarships helps schools streamline the external scholarship funding and maximize student success by getting scholarship funds into the accounts of student recipients more quickly, safely, and efficiently. Instantly connect with a network of scholarship providers for a seamless funding experience.

Moderator: Jesse Marquez, International Education Corporation
Speakers: Sun Ow, Great Lakes Educational Loan Services
Heather Tapia, Great Lakes Educational Loan Services

Session D3 – Portola (Portola Hotel & Spa, Level 1)

Professional Judgment - the ED Perspective

This session will explore statute allowances pertaining to a school's ability to provide professional judgment to assist students seeking Title IV support. We will explore school PJ policies including what is and is not PJ, documentation requirements, and how PJ interacts with verification. In addition, we will discuss the different kinds of professional judgement and related authorities afforded schools including COA adjustments, EFC data element considerations, dependency overrides, parent's refusal to complete FAFSA forms and provide support and denying or reducing Direct Loans. Examples, resources and references will be provided.

Moderator: Daley Roche, California Baptist University
Speaker: Bruce Honer, US Department of Education

Session D4 – Bonzai I (Portola Hotel & Spa, Level 1)

NASFAA Task Force on Loan Limits: Review of White Paper

Federal Direct Loan limits have been static for many years. How has this affected students who rely on financial aid to fund their higher education? Are the current limits meeting the current needs? What are some of the considerations that go into the discussion of whether to increase the limits and by how much? NASFAA's Task Force on Loan Limits has been reviewing these issues and issued a White Paper. Join our own member of the Task Force, Tyler Pruett, as he shares the issues and recommendations. This session is sponsored by the CASFAA Grad Professional Committee.

Moderator: Thalassa Naylor, Sallie Mae
Speaker: Tyler Pruett, Samuel Merritt University

Session D5 – Bonzai II (Portola Hotel & Spa, Level 1)

No Veteran Left Behind: Lessons Learned Navigating the Complexities of the GI Bill in a Financial Aid Office

In this session, we'll cover identifying and resolving challenges as a School Certifying Official in a Financial Aid Office for a small population of veterans and dependents of veterans when big changes happen all at once.

Moderator: Erin Vargas, University of California, Riverside
Speaker: Patrick Napier, University of California, Riverside

**Session D6 – Redwood (Portola Hotel & Spa, Level 3)
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: Lauren Hogan, University of California, Merced
Speaker: Cheryl Foster-Hunt, College Coach

**Session D7 – Ironwood (Portola Hotel & Spa, Level 3)
Looking Back, Looking Forward: Are You Ready for the Ride?**

With the recent changes in Washington, DC, comes arguably a major shift in the priorities of the new administration. Who are the movers and shakers? What's on the radar and what's not? What are the driving issues and how will all the moving parts affect us? Join Brett Lief, one of our industry's most respected veteran observers, as he takes us through a 30,000' view of where we've been and what may be in store for us.

Moderator: Anita Kermes, California State University, Sacramento
Speaker: Brett Lief, Windham Professionals

**Session D8 – Cottonwood (Portola Hotel & Spa, Level 3)
Loading Your Advocacy Tool Kit**

This session will prepare financial aid professionals to become advocates for financial aid issues by preparing a tool kit of federal and state resources.

Moderator: Denise Apuzzo, Gavilan College
Speakers: Lissa Wayne, New York Film Academy
Billie Jo Hamilton, NASFAA National Chair, University of South Florida

Monday, October 30, 2017 – 2:30 – 3:00 PM

Visit With Vendors – San Carlos Ballroom, Monterey Marriott

Monday, October 30, 2017 – 3:00 – 4:00 PM

**Session E1 – Ferrante's Bay View (Monterey Marriott, 2nd Floor)
2018-19 Verification**

This session will highlight the changes to the verification process for the 2018-19 award year. This session will include an overview of regulatory changes, documentation requirements, as well as verification reminders to ensure accurate processing.

Moderator: Peggy Fikse, Modesto Junior College
Speaker: Bruce Honer, US Department of Education

Session E2 – Los Angeles (Monterey Marriott, Mezzanine Level)

Financial Aid Management Strategies: The Benefits of Outsourcing Verification

It may be an understatement to say today's financial aid professionals are a little stressed. With staffing constraints and increased regulatory requirements, as well as serving students who expect streamlined, user-friendly experiences, higher education institutions are more challenged than ever to successfully meet ever-changing expectations. This presentation discusses how outsourcing can help schools provide more personalized service to students and their families while reducing administrative burden and the need for time-intensive technical support and regulatory compliance updates. Specifically, we will look at the benefits of outsourcing verification and the impact on helping institutions refocus resources, get a positive return on investment, and build their reputation as an innovative higher education industry leader. This Business Solutions Seminar is sponsored by Inceptia.

Moderator: Tanisha Bradfield, Orange Coast College
Speaker: Pat Robles-Friebert, Inceptia

Session E3 – Portola (Portola Hotel & Spa, Level 1)

Cal Grant Compliance Review

Interested in finding out the specifics of a Cal Grant audit? This session will go over the process involved in a Cal Grant audit, institutional/student eligibility requirements and common audit findings.

Moderator: Joel Brown, California Baptist University
Speakers: Dianne Alexander, California Student Aid Commission
Javier Argüello, California Student Aid Commission
Jon Waldrep, California Student Aid Commission

Session E4 – Bonzai I (Portola Hotel & Spa, Level 1)

Financial Aid "Inreach" and Outreach

This session will provide an overview of the objectives and strategies taken by the different college sectors in their financial aid outreach efforts. Specifically, this session will include discussion on all three public college segments that consist of Community college, UC, and CSU.

Moderator: Dianne Fulmer, Financial Aid TV
Speakers: Javier Andrade, Monterey Peninsula College,
Tracy Hale, California State University, Sacramento
Glenn Gumin, University of California, Santa Cruz

Session E5 – Bonzai II (Portola Hotel & Spa, Level 1)

Building a Holistic Veterans Center and Building Funding

This presentation will provide information of how to build a holistic Veterans Resource Center that promotes success while helping our veterans acclimate from military life into education and civilian life. We will discuss how Irvine Valley College led the State Legislature to fund our 114 colleges for veterans services with an outcome of over \$10 million dollars the first year of funding.

Moderator: Veronica Martinez, Gavilan College
Speaker: Nancy Montgomery, RN, MSN, Irvine Valley College

Session E6 – Redwood (Portola Hotel & Spa, Level 3)

Assets in the Need Analysis: Getting it Right

Have you read the Application and Verification Guide's description of the value of a trust? Do you understand it? Do you know when a 529 plan should be reported on the FAFSA, and when it should be left off? What about the value of rental property that is worth less than its mortgage? In this session, participants will get a refresher on the asset reporting rules, with an emphasis on those that are most confusing to aid officers, and hints about how to identify and resolve conflicting information related to the asset side of the need analysis.

Moderator: Renee Suryan, Credible

Speaker: Robert Weirnerman, Iron Bridge Resources

Session E7 – Ironwood (Portola Hotel & Spa, Level 3)

Student Loan Repayment Options - How Well Do You Know Them?

How savvy are you when it comes to understanding student loan repayment, much less explaining it to your students? In this session we'll discuss grace periods, debt tracking, repayment plan options, what to do when you can't afford to pay, deferments, forbearances, forgiveness, default and rehabilitation. Plus, we will have candy!

Moderator: Anna Hayman, Gemological Institute of America

Speakers: Abril Hunt, Education Credit Management Corporation

Tom Bailey, Education Credit Management Corporation

Session E8 – Cottonwood (Portola Hotel & Spa, Level 3)

Meeting the Needs of Our Homeless Students

This presentation will include a panel of representatives from the California Community Colleges Chancellor's Office and John Burton Advocates for Youth, who will share some of the current best practice models being used to address college students experiencing homelessness. The panel will explore the various definitions of "homeless" as it pertains to college students, and will explore ways in which financial aid administrators can be involved in addressing the needs of homeless students.

Moderator: Vanessa Gibson, Antelope Valley College

Speakers: Jessica Smith, Foundation for California Community Colleges

Debbie Raucher, John Burton Advocates for Youth

Monday, October 30, 2017 – 4:30 – 5:30 PM

Session F1 – Ferrante's Bay View (Monterey Marriott, 2nd Floor)

Year Round Pell

Come and hear an overview of the new provisions governing year-round Pell Grants. This session will include new statutory provisions, examples of calculations, and answers to frequently answered questions.

Moderator: Carolyn Guel, San Jose State University

Speaker: Bruce Honer, US Department of Education

Session F2 – Los Angeles (Monterey Marriott, Mezzanine Level)

Breaking Through the Clutter - Communicating About Debt to Today's Students

Knowing what mediums to use for what messages and how to break through to ensure your message is comprehended is a challenge many of us face when it comes to discussing the dynamics of acquiring and managing debt. Join this session to hear about proven strategies and messaging about debt among college-age adults using persistent forms of communication. This Business Solutions Seminar is sponsored by GetWisEdu.

Moderator: Christina Tangelakis, Hispanic Scholarship Fund

Speaker: Ruben Reyes, GetWisEdu

Session F3 – Portola (Portola Hotel & Spa, Level 1)

Practical Tools for Success

This session will provide practical tips for success for new and aspiring aid directors. Being successful takes more than managing aid programs and having a firm grasp of procedures and legislation governing financial aid. It also takes understanding the values of the people around you, having a vision, having the ability to plan well, and positioning your office on campus. Hear what skills a “seasoned” aid director feels have helped her to succeed and how you, too, can develop yourself and become a great leader!

Moderator: Colleen Krumwiede, Financial Aid TV

Speaker: Billie Jo Hamilton, NASFAA National Chair, University of South Florida

Session F4 – Bonzai I (Portola Hotel & Spa, Level 1)

Cash for College: Strategies for Increasing Financial Aid Awareness, Outreach and Application Completion

This session will provide participants with updates on the California Cash for College Campaign and focus on successful strategies and best practices for increasing financial aid awareness and outreach, to support financial aid application completion rates.

Moderator: Brad Williams, College Options

Speakers: Monica Montenegro, East Bay Cal-SOAP Consortium

Monica Roberts, Sacramento Cal-SOAP/Sacramento County Office of Education

Session F5 – Bonzai II (Portola Hotel & Spa, Level 1)

Basic Needs: Intersectionality, Hunger, and Homelessness

The latest UC System Student Experience Surveys have confirmed that 44% of Undergraduates and 29% of Graduate Students are food insecure. Additionally, 5% of Undergraduates and 6% of Graduate Students experienced homelessness at some point of the academic year. Join us to learn about our basic needs research, preventative campus model, institutional integration strategies, and advocacy. Financial Aid plays an essential role in eradicating hunger and homelessness from the college/university experience!

Moderator: Jodie Lingenfelter, University of California, Merced

Speakers: Ruben Canedo, University of California, Berkeley

Chris Carter, University of California, Office of the President

Tim Galarneau, University of California, Santa Cruz

Session F6 – Redwood (Portola Hotel & Spa, Level 3)

PJ and PPY: Professional Judgment in the Era of Prior Prior Year

Prior Prior Year is now underway and there are questions about how to handle special circumstances and professional judgment. How are offices making and managing these decisions? Two campuses will share their approaches and some specific examples of professional judgments made in this first cycle of prior prior year tax information. Those interested in this session are encouraged to attend the Professional Judgment session by ED that takes place prior to this presentation.

Moderator: Sarah Davis, University of San Diego
Speakers: Jessica Moore, University of California, Santa Cruz
Ashlie McCallon, California State University, Monterey Bay

Session F7 – Ironwood (Portola Hotel & Spa, Level 3)

Financial Wellness: More Than a Buzzword, Building A Financial Wellness Program

Join us for a conversation about building a financial wellness program specific to your student populations' needs – former foster youth, DREAMers, 1st year students, transfers. We will share experiences (positive and challenging) from the beginning stages up to the final stages.

Moderator: Patrick Napier, University of California, Riverside
Speakers: Monica Martinez, University of California, Riverside
Claudia Villicana, University of California, Berkeley

Session F8 – Cottonwood (Portola Hotel & Spa, Level 3)

Using Advocacy to Strengthen College Affordability for California's Needy Students

There is a growing recognition of the importance of providing financial aid, but state lawmakers can do much more to ensure that Californians have the resources they need to get to and through college. How do you proactively influence their ideas and decisions so they make well-informed decisions? How can you incorporate your ideas and practical knowledge into their process? This session will explore past campaigns and current strategies to educate policymakers and other key stakeholders about students' college affordability challenges and how you can effectively advocate for well-targeted solutions. Join us and learn more about how you can join efforts to strengthen need-based state financial aid to help more Californians complete college!

Moderator: Luanne Canestro, San Mateo Community College District
Speakers: Laura Szabo-Kubitz, The Institute for College Access and Success
Rob Shorette, California State Student Association
Rob Parisi, Allan Hancock College

Monday, October 30, 2017 – 6:30 – 10:30 PM

Dinner, Dancing, Cocktails, Awards - **San Carlos Ballroom, Monterey Marriott**

Tuesday, October 31, 2017 – 8:00 – 9:00 AM

Breakfast and Business Meeting – **De Anza Ballroom, Portola Hotel & Spa**

Tuesday, October 31, 2017 – 9:00 – 10:00 AM

NASFAA Chair's Update – **De Anza Ballroom, Portola Hotel & Spa**

Speaker: Billie Joe Hamilton, NASFAA National Chair, University of South Florida

Tuesday, October 31, 2017 – 10:15 – 12:00 PM

Federal Update – **De Anza Ballroom, Portola Hotel & Spa**

Tuesday, October 31, 2017 – 12:00 PM

Final Comments & Adjourn – **De Anza Ballroom, Portola Hotel & Spa**

See You Next Year!!