

CASFAA Conference 2017 Finding Your Voice

Conference Interest Sessions (Draft)

Sessions from the US Department of Education –

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.

Speaker – Adam Shenedling

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!

Speaker – Chuck Hirman

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!

Speaker – Chuck Hirman

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.

Speaker – Bruce Honer

2018-19 FOTW/DRT changes

Session Description Forthcoming.

Speaker – Bruce Honer

2018-19 Verification

Session Description Forthcoming.

Speaker – Bruce Honer

Year Round Pell

Session Description Forthcoming.

Speaker – Bruce Honer

Professional Judgments - the ED Perspective

Congress gives schools the authority to exercise professional judgment when the reality of student/family circumstances don't allow the round peg to fit in the square hole. But as tax law becomes more complex and we become more sensitive to the myriad of individual human conditions, the traditional concepts of ability-to-pay and what constitutes available income get clouded. Join this discussion as Bruce Honer shares how ED views the proper application of this powerful statute.

Speaker – Bruce Honer

Administering Disbursements

Join this detailed discussion of timely and accurate reporting, disbursement records and COD, credit balances, early and late disbursements, post-withdrawal disbursements, retroactive disbursements, and regaining eligibility. You'll be glad you did!

Speaker – Bruce Honer

Sessions from the California Student Aid Commission

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.

Speakers – Catalina Mistler, Tae Kang

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.

Speakers – - Dianne Alexander, Javier Argüello, Jon Waldrep

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.

Speakers – - Dianne Alexander, Javier Argüello, Jon Waldrep

Sessions on Management, Leadership and Global Thinking

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.

Speaker – Brett Lief, Windham Professionals

Promise Scholars: Exploring Multiyear Financial Aid Programs

In an effort to help high need families plan for the total cost of education at UC Santa Barbara, we have created a four-year promise of \$120,000 in grants and scholarships. Come learn how

this innovative program works and how UC Santa Barbara's Promise Scholars are thriving thanks to this multiyear approach.

Speaker – Michael Miller. UC Santa Barbara

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.

Speaker – Mark Kantrowitz, Cappex.com LLC

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.

Speaker – Nancy Montgomery, RN, MSN, Irvine Valley College

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!

Speakers – Ruben Canedo, Chris Carter, Tim Galarneau, UC Office of the President

Sessions on Financial Aid/Best Practices

What's In An EFC?

Session Description Forthcoming.

Speaker – Cheryl Foster-Hunt, College Coach

1040 Review

How to use the Tax Decoder when reviewing 1040s and tax transcripts.

Speaker – Cheryl Foster-Hunt, College Coach

PJ and PPY: Professional Judgement 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 judgement. 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.

Speakers – Jessica Moore, UC Santa Cruz; CSU Rep TBA

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.

Speaker – Robert Weinerman, Iron Bridge Resources

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.

Speaker – Patrick Napier, UC Riverside

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.

Speakers – Sonia Ramos, Monica Montenegro, Monica Roberts, UC Santa Cruz

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.

Speaker – Pat Robles-Friebert

Resources for Dreamers

e4fc. Who are we and what do we do? Join this session to find out how we work with schools to provide support and resources for Dream students as well as what other colleges are doing.

Speaker – Nancy Jodaitis, Educators for Fair Consideration

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.

Speakers – Javier Andrade, Monterey Peninsula College, Anita Kermes, Sacramento State University; Glenn Gumin, UC Santa Cruz

Sessions on Advocacy

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.

Speaker – Daniel Roddick, UC Office of the President

NAFSFAA 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.

Speaker – Lissa Wayne, New York Film Academy

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!

Speakers – Laura Szabo-Kubitz, TICAS; Rob Shorette, California State Student Association; Rob Parisi, Allan Hancock College

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!

Speaker – Daniel Reed, San Diego Christian College

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

Speakers – Jessica Smith, Foundation for California Community Colleges; Deborah Pruitt and Debbie Raucher, John Burton Advocates for Youth

Sessions on Customer Service and Financial Literacy

Default Prevention - Family Feud

We all know default prevention is important to student success. However, there are so many moving parts to it and explaining it to students and staff can be overwhelming. We will 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.

Speakers – Greg Kerr, Rosemary Martinez-Kepford, ECMC

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 will 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

Speakers –April Hunt, Tom Bailey, ECMC

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.

Speakers Monica Martinez, UC Riverside; Claudia Villicana, UC Berkeley

Sessions for Professional Development

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?

Speaker – Mark Gotsch, Professional Connect

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.

Speaker – Mark Gotsch, Professional Connect

Communication Matters: Recognizing and Responding to Microaggressions

In our daily communications, 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.

Speakers – Teresa Maria Linda Scholz, Christy Byrd, UC Santa Cruz

Sessions for Graduate and Professional Schools

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.

Speakers – Justin Draeger, NASFAA; Brett Lief, Windham Professionals

NASFAA Task Force on Loan Limits: Review of White Paper

NASFAA Task Force on Loan Limits - Sharing the discussions and White Paper findings

Speakers – Members of the CASFAA GP Committee TBA

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.

Speaker – Vicki Shipley, National Council of Higher Education Resources

How Student Loans Impact Credit

Session Description Forthcoming

Speakers – Sun Ow, Great Lakes Higher Education Loan Services; GP Members TBA

Business Solutions Sessions From Premium Vendors

TBA