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TOGETHER.

FALL 2018 CONFERENCE PRESENTATION DESCRIPTIONS

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WEDNESDAY, NOVEMBER 14, 2018

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PRE-CONFERENCE NASFAA CREDENTIALING SESSION – TOPIC: PROFESSIONAL JUDGMENT
(November 14, 8:30 – 11:30am)
Attend this session to understand the: (a) meaning, purpose, and underlying principles of professional judgment (PJ); (a) areas of financial aid administration to which PJ may be applied; and (c) general documentation requirements applicable when exercising PJ.
Facilitator: Ibrahim Baalbaki, Financial Aid Coordinator, Madison Area Technical College

Professional Development for Working Professionals
(November 14, 2:00pm – 3:00pm)

An overview of career credentials and training that can be done online, or on a flexible basis, that do not require full time study and are reasonably priced. Will include intro to UW's CPM program, the many certificates available through WTCS schools, but other credentials as well.

Presenter: John Reinemann, Executive Secretary, HEAB

Policies and Procedures: Are You Compliant and Student-Focused?
(November 14, 2:00pm – 3:00pm)

Developing policies and procedures can be a daunting task but it doesn't have to be when your development process is centered on the best way to serve students. Join this session to learn about strategies, perspectives, and tools on what and how to build policies and procedures that are both compliant and student-focused.

Presenters:
Kevin McShane, Vice President of Financial Aid and Compliance, Herzing University; Greg Offerman, Associate Director for Advising and Outreach, UW-Madison; Susan Teerink, Director of Financial Aid, Marquette University

How Students use Credit and What You Need to Know
(November 14, 2:00pm – 3:00pm)

Provides a comprehensive review of how students & parents may improve their credit scores & insights for future credit management decisions. It will cover the value of educating consumers about their personal credit profiles. Specifically, within higher education financing, a cosigner's credit history & credit score are key factors that help determine whether a loan is approved & what interest rate is assigned. Also discuss how FA community can help students build their credit history through college and beyond.
Presenter: Deb Gossman, Head of Campus Development, College Ave

Return of Title IV (R2T4) - Town Hall
(November 14, 2:00pm – 3:00pm)

Welcome to the R2T4 Town Hall! Have you ever attended an R2T4 presentation, patiently listening, patiently waiting for that last 15 minutes because all you need is that one question answered, only to find that 15 other people had questions before you and time just ran out? We have one whole hour dedicated to answering questions, talking about common concerns, and commiserating about the program that shows up in the top ten audit findings year after year. Come join the conversation!
Presenter: Susan Johnson, Financial Aid Advisor, UW-Whitewater

Maximizing Student Employment through Partnerships
(November 14, 3:30 – 4:30 pm)

The student's employment experience on a college campus not only is a means to enhance access, but is also a powerfully important high-impact practice for many students collegiate experience. As student employment administrators it is critical that we are constantly finding ways to creatively maximize the experience provided and the ways to creatively maximize the experience provided across campus from the student's employment application through their eventual graduation. This session will be collaborative in nature and focused on real, practical examples of partnership.
Presenter: Justin Mumford, Assistant Director for Student Employment, UW-Madison

Ask-A-Fed w/Zack!
(November 14, 3:30 – 4:30pm)

Have a burning question in regard to Title IV financial aid? Be sure to join this session to speak directly to a Department of Education official for all of your answers!

Presenter: Zachary Goodwin, Federal Trainer, U.S. Department of Education

Understanding Student Loan Refi
(November 14, 3:30pm – 4:30pm)

Are you concerned about rapidly increasing student debt levels? Are you looking for solutions to represent to our students that can assist them with managing their federal and private student loan debt as well as possibly reducing their total repayment costs and thereby reducing default rates? If these are issues you and your students face, refinancing can help! This Session will explore the growing student loan refinancing trend by providing a primer on how student loan refinancing works. In addition, we will dispel the myths surrounding these products and provide you with counseling tools which you can use to advise your graduates so they can determine if refinancing is right for them.

Presenter: Jane Lemke, Account Manager, Common Bond

Recertification: Sharing What We Learned
(November 14, 3:30 – 4:30pm)

Complying with the Department of Education can be administratively burdensome. However, what happens when you must ensure that everything is compliant all at once!? Attend this session to hear what financial aid directors experienced going through the recertification process. They'll share pain points, successes, and tips on how to make it less daunting. You'll discover the recertification process takes a village to come out on the winning side.

Presenters: Triena Bodart, Financial Aid Manager, Moraine Park Technical College; John Cage, Director of Financial Aid, UW-Platteville

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THURSDAY, NOVEMBER 15, 2018

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Independent or Dependent? De-mystifying the DD-214 and VA topics
(November 15, 10:15am – 11:15am)

Have you ever been confused in trying to interpret what the variations of statuses and fields mean on the DD-214? This session will provide an overview of how to properly evaluate the DD-214 for FAFSA dependency status review. You will also learn key pieces of VA benefits that impact student eligibility on your campuses.
Presenters: James Schmidt, Senior Administrative Program Specialist, UW-Milwaukee; Elaina Koltz, Financial Aid Advisor, UW-Green Bay

How I Did It: Work-Life Balance and Competing Priorities
(November 15, 10:15am – 11:15am)

Join Olympian Nina Ross as she shares how she embraced work-life balance, paid off school, and trained for the Olympics. She'll share strategies about how she prioritized her busy life and made an impact in society.
Presenter: Olympian Nina Ross

How America Values College 2018
(November 15, 10:15am-11:15am)

How America Values College 2018, a national study by Sallie Mae and Ipsos, explores how families of undergraduates regard the value of higher education, the factors that influence their choice of schools, and the steps they're taking to make college affordable. The study explores several items that students and families consider when selecting a college such as academic quality, cost, personal preferences and lifestyle choices. Discussion will also focus on the resources families use to pay for college, particularly reliance on financial and and the role of student loans, and highlight differences among certain population segments.
Presenter: Jill Gosse, Senior Account Executive, Sallie Mae

Introduction to the Four Frames - Artistry in Leadership
(November 15, 10:15am – 11:15am)
Why is it so hard to manage organizations? Why do smart managers make so many dumb mistakes? How can expanding your mental models help you to avoid the pitfalls of managerial decision-making? Using the book "Reframing Organizations" by Lee Bolman and Terrance Deal, we will discuss different ways to view workplace issues. Putting the "four frames" (Structural, Human Resource, Political and Symbolic) to work for you can help you see situations more completely and make better decisions on how to respond.
Presenter: Robert Bode, Director of Financial Aid, UW-River Falls

Taking an active loan in student loan counseling
(November 15, 11:30am – Noon)

In today's environment, there is a heightened focus on ensuring that students are aware of their funding options. A preferred lender list can help your students and families make informed decisions. Join this session to better understand the rules and best practices regarding the use if a preferred lender list.
Presenter: Jill Gosse, Senior Account Executive, Sallie Mae

How to Protect Students from Scholarship Scams
(November 15, 11:30am – Noon)

Identifying scholarship providers who have ulterior motives (vaping? PII requests? Fees?) is getting harder and harder for students. Yet schools rank applying for scholarships as the easiest step in the financial aid process. The vetted external scholarship database in Scholarship Universe makes it easy for you to provide relevant, trusted scholarship opportunities to your students, helping them close funding gaps, bringing outside funds to your institution, and improving your enrollment and retention numbers.
Presenter: Darren Wacker, Regional Director, CampusLogic, Mankato Area Public Schools

Financial Aid Management Strategies: The Benefits of Outsourcing Verification
(November 15, 11:30am – Noon)

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.
Presenter: Juan Perez, Strategic Business Director, Inceptia

Reframing Organizations 2: The Political Frame
(November 15, 2:30pm – 3:30pm)

You won't see it on any job description, but mastering the politics of your institution is a critical skill for any financial aid director. Using the "Four Frames" model described in Bolman and Deal's "Reframing Organizations" this session will explore concepts of power, conflict, advocacy and competition in the educational institution setting. Attendees will more easily recognize the politics at play in resource

allocation and decision-making, and will learn techniques towards becoming stronger advocates for their offices. Participants will engage in a group exercise to apply lessons learned in this session.
Presenter: Robert Bode, Director of Financial Aid, UW-River Falls

Verification: Days of Future Past
(November 15, 2:30pm – 3:30pm)

In this session we will review current requirements for verification, for 2018-2019 and 2019-2020 (spoiler alert – they are the same!). Time will be left for discussion of prospects for future requirements.
Presenter: Zachary Goodwin, Federal Training Officer, Department of Education

How Students Can Reduce their Loan Burdens Before and after they Graduate
(November 15, 2:30pm – 3:30pm)

This session will cover strategies that students and parents can employ during and after school to help reduce the debt burden many face in financing their education. The session will specifically call out repayment options students should consider upon graduation.
Presenter: Jane Lemke, Account Manager, Common Bond

CFPB Listening Session: Federal and State Issues
(November 15, 2:30 – 3:30pm)

Attend this session to hear what the Consumer Financial Protection Bureau priorities are for this year and share your pain points in assisting students on your campus. This information will be used to help CFPB better serve financial aid through policies, expanded research, tools, or partnerships.
Presenters: Kristen Messina-Evans, Acting Section Chief, Bureau of Consumer Financial Protections; David Mancl, Director of the Office of Financial Literacy, Department of Financial Institutions; Governor's Council Member on Financial Literacy

Funding Generation Z and Millennials
(November 15, 3:45pm – 4:45pm)

Whether we like it or not, our students are changing! Learn how to keep up with these changes! In this session we will explore the expectations and mindset of Gen Z students and consider how they contrast with millennials. We will enter the minds of your Gen Z students and review how their unique perspective impacts their lives, their view, their vision and their buying choices. What do they want and need from us to support them?
Presenter: Jane Lemke, Account Manager, Common Bond

A Pretty Revealing Discussion (PRD) of Pell Recalculation Dates (PRDs)
(November 15, 3:45 – 4:45pm)

When must Pell Grant awards be recalculated? When may they be? In this session we will review required and optional recalculations, including Pell Recalculation Dates (PRDs), and how these relate to course adds, drops and withdrawals.
Presenter: Zachary Goodwin, Federal Training Officer, Department of Education

Query Writing 101 - PeopleSoft
(November 15, 3:45pm – 4:45pm)

Learn the bare bones basics of query writing including records, commonly used tables, adding criteria, fields, conditions, prompts, joining tables, keys, and simple expressions.
Presenter: Alex White, Senior Business Analyst, UW-Madison

My Institution is Talking CBE, What Do I Do?
(November 15, 3:35pm – 4:45pm)

Have you wondered what it takes to implement Competency Based Programs on your campus? Join this session to hear how these experts implemented it at their institutions. Specific topics include: Academic Calendars or Terms, Where and how Financial Aid should be Involved, and the difference between CBE vs Direct Assessment.
Presenters: Trisha Springstead, Compliance Officer, UW-Milwaukee; Jill Price, Director of Financial Aid, Nicolet Area Technical College

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FRIDAY, NOVEMBER 16, 2018

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Cultural Connections: Understanding the Habits and Behaviors of Students
(November 16, 9:15am – 10:15am)

Diversity is more than a term, it's an endearing part of culture that we all experience. However, are we embracing the differences of each other and using it to understand our students better? Attend this session to hear what I learned about culture and how it influences the behaviors and thinking of our students. You'll discover that there is a vast difference in our expectations compared to others.

Presenter: Lucia Nunez, Vice President of Diversity, Inclusion and Community Partnerships, Madison Area Technical College

Hosting Free Money Friday Events on Campus
(November 16, 9:15-10:15am)

Topics likely to be covered are: What is free money Friday? Examples of what schools have done. How schools can support & host a Free Money Friday event on campus.
Presenters: Kristin Mootz, Director of Student Financial Aid Services, Medical College of Wisconsin; Cheryl (Weiss) Rapp, College Affordability Specialist, Wisconsin Department of Financial Institutions; Renola Swodoba, Senior Social Media Specialist, Nelnet; Vicky Somers, Loan Officer, Alverno College; Lyndsey Thomas, Financial Literacy Coordinator, Western Technical College

Title IX – Things the Financial Aid Office Needs to Know
(November 16, 9:15am – 10:15am)

Title IX is a federal education law that is part of the Educational Amendments Act of 1972. It prohibits sex discrimination in educational programs or educational activities that receive federal financial assistance. Title IX covers all institutions participating in the federal student financial aid program. Title IX clearly has implications when it comes to the world of financial aid and how we interact with our students. Come to this session to learn and discuss the intersections of financial aid and Title IX.
Presenter: Heather M. Kind-Keppel, University Diversity & Inclusion Officer, UW-Parkside