

Waves of Change: Oceans of Opportunity

**Ohio Association of Student
Financial Aid Administrators
Spring Conference**

**May 8-10, 2017
Hilton Columbus Polaris**



From the OASFAA President

Welcome to the 2017 Spring Conference where we will "cut" our way through this year's wave of changes in financial aid. Glad you could join us to experience the ***Waves of Change: Oceans of Opportunity***. As always, this conference is certain to be an information packed, fun-filled networking opportunity.

Andrea Morrow, VP for Conferences and the conference planning committee have done an outstanding job of developing a program suited for all. They put a lot of thought into designing a diverse and exciting conference including a preconference with a NASFAA Credential course in Packaging and Award Notifications.

Our Keynote Speaker is Kent Rader, Former CPA and CFO. Now a professional speaker and author, Kent has a passion for helping others learn and experience how laughter matters in reducing stress and improving education. Are we at risk for burnout and illness due to the stress of financial aid? His stress reduction keynote titled "*Let It Go, Just Let It Go*" is entertaining and informative and will show us the origins of stressful feelings and how humor is a proven tool to combat these feelings.

In addition, NASFAA representative, Karen McCarthy will join us to share information about the climate on the Hill and present an interest session on Tuesday titled *Advocacy and You*. We will have a state update provided by Jim Bennet and update from MASFAA by Thomas Ratliff, MASFAA President. Last but not least, you will see a friendly face from the U.S. Department of Education as Zack Goodwin returns to provide the federal update as well as federal interest sessions.

We have everything you would expect in an OASFAA conference; engaging comprehensive federal sessions, empowering keynote speakers, a variety of interest sessions for both new and veteran financial aid professionals providing various topics to enhance your financial aid knowledge and skills. I hope you see the value in what we have prepared for you!

I would be remiss if I did not take an opportunity to give my sincere "thank you" to all of our vendors and sponsors. Their tireless dedication to OASFAA is much appreciated and does not go unnoticed. Our conferences would be impossible without their support. I encourage all conference attendees to stop by the vendor area to show your appreciation and check out all of the services they have to offer.

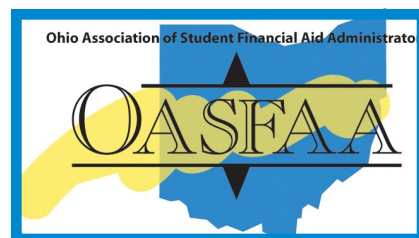
Finally, I would like to express my genuine gratitude to the 2016-2017 OASFAA board, committee chairs, and committee members for making this year so successful. As my term is coming to an end I am amazed at how fast the year went. The executive committee has had a busy year and has worked very hard to push OASFAA forward. OASFAA is an amazing organization that is fused together by our remarkable members. It has truly been my honor to serve as your president. I encourage each of you to take a step back and think about where you could best fit in OASFAA and get involved. OASFAA needs you, and I promise you will not regret it.

Sincerely,

A handwritten signature in black ink that reads "Faith Phillips".

Faith Phillips

2016-2017 OASFAA President





2016-17 Executive Committee Trustees

President - **Faith Phillips**, Central Ohio Technical College & Ohio State Newark

President-Elect - **Susan Kannenwischer**, Capital University

Past-President - **Amanda Reisinger**, Zane State College

Vice President for Conferences - **Andrea Morrow**, Owens Community College

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Southeast Regional Representative - **Emily Haynam**, The Ohio State University

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2016-17 Executive Committee Chairs

Associate Member Relations - **John Brown**, Great Lakes Educational Loan Services, Inc; **Jennifer Toomey**, Case Western Reserve University

Association Governance & Planning - **Betsy Johnson**, Bowling Green State University; **Cheryl Willard**, Baldwin Wallace University

Communications - **Mary Lynn Perri**, Ursuline College; **Claudia Wenzel**, John Carroll University

Conference Entertainment - **Stacey Black**, Cuyahoga Community College; **Greg Carlo**, cuLearn with Thrivent; **Michael Jones**, Citizens Bank

Conference Program - **Ann Marie Gruber**, Lakeland Community College

Conference Registration - **Matthew Moore**, Sinclair Community College

Conference Site - **Stephanie Goller**, University of Toledo; **Scott Lauffer**, Lake Erie College

Diversity - **Angela Johnson**, Cuyahoga Community College; **James McDougal**, KEMBA Financial Credit Union

Early FAFSA/College Goal Sunday - **MorraLee Keller**, National College Access Network

Finance - **Susan Kannenwischer**, Capital University

Leadership - **Kristy Gardner**, The Ohio State University; **Kristy Call**, Kent State University Ashtabula

Membership - **Debra Clark**, Central Ohio Technical College & Ohio State Newark

Need Analysis - **Leigh Jackson**, University of Cincinnati; **Will McGinley**, Baldwin Wallace University

New Member/Mentor - **Kirby Adams**, Sinclair Community College; **Renee Lamp**, Cuyahoga Community College

Nominations - **Susan Kannenwischer**, Capital University

Outreach - **Mary Cannon**, Hondros College of Nursing; **Jeff Johnston**, Sallie Mae; **Cody McMillen**, University of Dayton

Professional Development - **Randy Ulses**, University of Cincinnati

Regulatory - **Kim Jenerette**, Cedarville University; **Ashley Eder**, DeVry University

Research - **Emily Mattison**, University of Mount Union

Support Professionals - **Erin Glass**, Franklin University; **Nancy Shepard**, Central Ohio Technical College & Ohio State Newark



2016-17 Executive Committee Liaison

Ohio Department of Higher Education - **Tamika Braswell**



Past Presidents



- 2015-16 **Amanda Reisinger**, Zane State College
2014-15 **Angela Johnson**, Cuyahoga Community College
2013-14 **Randy Green**, Wittenberg University
2012-13 **Cheryl Willard**, Baldwin Wallace University
2011-12 **Stephanie Sutton**, Lorain County Community College
2010-11 **Ann Marie Gruber**, Lakeland Community College
2009-10 **Randy J. Ulses**, University of Cincinnati
2008-09 **Betsy Johnson**, Owens Community College
2007-08 **Amy Baker (Welty)**, Stark State College
2006-07 **Claudia Wenzel**, John Carroll University
2005-06 **Mary Lynn Perri**, Ursuline College
2004-05 **Mark Bandré**, Ohio Wesleyan University
2003-04 **Wendell Schick**, Ohio Northern University
2002-03 **Mary Kay Freshour**, Otterbein University*
2001-02 **Brian Paskvan**, Owens Community College*
2000-01 **Katherine Bontrager**, Columbus State Community College
1999-00 **Steve England**, Stark State College of Technology
1998-99 **Brian Paskvan**, Owens Community College
1997-98 **Kathy Wiesenauer**, Sinclair Community College
1996-97 **Theodore Hallenbeck**, Kent State University
1995-96 **Kathy Fay (Milem)**, The Ohio State University-Newark/COTC
1994-95 **Ginny Biada**, Baldwin-Wallace College
1993-94 **Lisa Hanson**, Stark Technical College
1992-93 **Jeff Zellers**, Muskingum College
1991-92 **Alex Murdoch**, University of Cincinnati
1990-91 **Arman Habeggar**, University of Findlay
1989-90 **Deb Heineman (Johnson)**, Bowling Green State University
1988-89 **Josette Green**, Stark Technical College
1987-88 **Michele Nemes Meeker (Wade)**, The Ohio State University
1986-87 **James Bauer**, Marietta College
1985-86 **Karen Berger (Condemi)**, Ohio Northern University
1984-85 **Earl Dowling**, University of Cincinnati
1983-84 **Gary Rohmann**, Mount Vernon Nazarene College
1982-83 **Marc Brenner**, Ohio Diesel Technical Institute
1981-82 **Edwin Below**, Baldwin-Wallace College
1980-81 **Bob Hahn**, University of Akron
1979-80 **David Darr**, Wright State University
1978-79 **Paul Orehovec**, The College of Wooster
1977-78 **Rodney Harrison**, The Ohio State University
1976-77 **Harry Beck**, University of Cincinnati
1975-76 **William Bennett**, Cleveland State University
1974-75 **Donald Chenelle**, Case Western Reserve University
1973-74 **James Hoover**, University of Dayton
1972-73 **Alan Donley**, Hiram College
1971-72 **James White**, Oberlin College
1970-71 **Guy Spitler**, Miami University
1969-70 **Mac Richardson**, Baldwin-Wallace College
1968-69 **Robert McKay**, Bowling Green State University

** Served partial year for 2001-2002*





Conference Planning Committee

Kirby Adams - Sinclair Community College
Christina Allen - Kent State University
Stacey Black - Cuyahoga Community College
Dave Bowman - Great Lakes Educational Loan Services, Inc.
Tamika Braswell - Ohio Department of Higher Education
Wes Brothers - Ohio Christian University
John Brown - Great Lakes Educational Loan Services, Inc.
Kristy Call - Kent State University Ashtabula
Mary Cannon - Hondros College of Nursing
Greg Carlo - cuLearn with Thrivent
Judy Cunningham - College Advantage
Vicki DeLucas - Ohio University Zanesville
Adam Dilulio - Cuyahoga Community College
Tracy Drechsler - American Student Assistance
Ashley Eder - DeVry University
Meghann Fraley - University of Rio Grande
Kristy Gardner - The Ohio State University
Stephanie Goller - University of Toledo
Emily Goldman - Hondros College of Nursing
Ann Marie Gruber - Lakeland Community College
Emily Haynam - The Ohio State University

Vena Hill - Columbus State Community College
Jeff Johnston - Sallie Mae
Michael Jones - Citizens Bank
Susan Kannenwischer - Capital University
MorraLee Keller - National College Access Network
Scott Lauffer - Lake Erie College
Carolyn McCluskey - Baldwin Wallace University
James McDougal - KEMBA Financial Credit Union
Jesse McMillan - Capital University
Matthew Moore - Sinclair Community College
Andrea Morrow - Owens Community College
Jared Nofziger - Valor Christian College
Faith Phillips - Central Ohio Technical College & Ohio State Newark
Amanda Reisinger - Zane State College
Mary Reshad - Wright State University
Carrie Short - University of Akron
Jennifer Toomey - Case Western Reserve University
Randy Ulses - University of Cincinnati
Lauren Urban - John Carroll University
Melanie Weaver - Ohio Northern University



Conference Scholarships

Mary Arter Bell Conference Scholarship

Mary Arter Bell, friend and colleague, will be remembered for her passionate approach to serving others, her commitment to student success, and her sincere dedication to The Ohio Association of Student Financial Aid Administrators. Mary served on many OASFAA committees throughout her career and she especially enjoyed planning and participating in conferences. Although Mary lost her battle to leukemia in May 2012, she will not be forgotten.

The Mary Arter Bell Conference Scholarship will allow us to continue to recognize Mary's contributions as we come together as a community at annual conferences. Each year these scholarships provide funding to those who would otherwise not have the resources available to them from their institutions to attend conference.

Please join us in welcoming our Spring Conference 2017 Mary Arter Bell Scholarship recipients:

Rhonda Austin - Ursuline College
Andrea Blake - Central State University
Vincent Culpepper - Central State University
Beth Davidson - Miami University - Middletown

Megan Edwards - University of Mount Union
Rachel Moore - Franklin University
Sheila Nelson-Hensley - Belmont College





Awards & Recognition

James W. White Award

The James W. White Award honors James W. White, Director of Financial Aid at Oberlin College, when he retired in 1990. The award, first presented at Spring Conference 1991, is given annually to a member of OASFAA who exemplifies the dedication to students, to the aid community, and to the recipient's local community-qualities that were so evident in Jim's career as a financial aid professional.

2016 **Faith Phillips** - Central Ohio Technical College & Ohio State Newark

2015 **James McDougal** - Kemba Financial Credit Union

2014 **Cheryl Willard** - Baldwin Wallace University

2013 **Jeff Johnston** - Sallie Mae

2012 **Bev Dalheim** - Lakeland Community College

2011 **Mary Arter Bell** - US Bank

2010 **Roger Eldridge** - Great Lakes Higher Education Corporation

2009 **Stephanie Sutton** - Lorain County Community College

2008 **Gary Ulrich** - Owens Community College-Findlay Campus

2007 **Debra Lee Divers** - BGSU Firelands

2006 **Geraldine Parker-Thrower** - Lakeland Community College

2005 **Gregory A. Guzmán** - Lourdes College

2004 **Lawrence Matthews** - Bluffton University

2003 **MorraLee Holzapfel** - I Know I Can

2002 **Steve England** - AES/PHEAA

2001 **Jerome Weiskittle** - Franciscan University of Steubenville

2000 **Donald Chenelle** - Case Western Reserve University

1999 **Arman Habegger** - University of Findlay

1998 **Lisa K. Mitchell** - Student Loan Funding

1997 **Ginny Biada** - Baldwin-Wallace College

1996 **Alex Murdoch** - University of Cincinnati

1995 **Wendell Schick** - Ohio Northern University

1994 **Clark Reber** - Lourdes College

1993 **Michele Nemes Meeker** - The Ohio State University

1992 **William Bennett** - Cleveland State University

1991 **Robert Hahn** - University of Akron



THANK
YOU

Great Lakes Educational Loan Services, Inc.
OASFAA Spring 2017 Conference Sponsor



Awards & Recognition

Support Professional Award

The Support Professional Award, initiated in 1990, recognizes an individual or team of support/clerical professionals reporting to an OASFAA member. Nominations are submitted to the Support Professional Committee and the award is made at Spring Conference. The recipient exemplifies a strong commitment to the student, institution for which they work, and the financial aid profession.

- 2016 **Lisa Jackson** - Kent State University
2015 **Renee Hales** - Oberlin College
2014 **Christa McNichols** - Mount Vernon Nazarene University
2013 **Dawn Langdon** - Stark State College
2012 **Marion Carter** - The Ohio State University
2011 **Christina Emerson** - Case Western Reserve University
2010 **Debra Clark** - Central Ohio Technical College
2009 **Jennifer Healey** - University of Dayton
2008 **Kim Kuhajda** - Baldwin-Wallace College
2007 **Jenny Rumpler and Pat Tobis** - Miami University
2006 **Tracy Febel** - Lakeland Community College
2005 **Ann Cano** - University of Dayton
2004 **Janet Crawford, Lee Ann Timmerman, Sherry Benjamin, Kathy Sybert** - Ohio Northern University
2003 **Dottie Chapman** - Bluffton College
2002 **Tenley Peterson** - University of Toledo
2001 **Annie Johnson** - Ohio State University
2000 **Shannon Maag** - Lima Technical College
1999 **Darlene Burns** - Walsh University
1998 **Stephanie Medley** - Belmont Technical College
Bea Pettaway - Medical College of Ohio
Sandy Vilkowski - Miami University
1997 **Laura Witt** - NE Ohio College of Medicine
JoAnn Evans, Kathy Stripling, Carrie Lemle, Kevin Paskvan - Owens Community College
Lola Hauss - Capital University
Debbie Back, Linda Will, Marcia Mitchell, Anthony Boniella, Evelyn Harris, Patricia Rakestraw, Candace McGowan, Rodney Gross, Cheryl Griffin-Daugherty, Robin McLemore, Rutha Lacking - Sinclair Community College
1996 **Andrea Hines** - Oberlin College
Barb Noonan and Kent McKenzie - University of Toledo
Barbara Birk - Capital University
Kathi Richards - Edison Community College
1995 **Judy Cook** - University of Findlay
1994 **Melissa Chandler** - Lakeland Community College
1993 **Carol Benedum, Meilani Cook, Marge Smith** - Stark Technical College
1992 **Janet Crawford** - Ohio Northern University
Becky Heaton - Mount Vernon Nazarene
1991 **Sandy Miller** - Ohio University
1990 **Ruth Murphy** - Marietta College





2016-17 Don Chenelle Leadership Class

The OASFAA Leadership Program was initiated in 2002-03 as a way to recognize the talents inherent in our members, provide programming to enrich those talents and build leadership and volunteerism within the Association, community and the workplace. Beginning with the Class of 2010, the program was named in honor of one of OASFAA's past presidents, Don Chenelle.

Congratulations to the 2016-17 OASFAA Leadership Class!



Bailey Bartels - University of Cincinnati

Cathy Belfiore - Oberlin College

Loretta Bradfield - Cuyahoga Community College

Jeffrey Croghan - Cleveland State University

Brandi Everhart - Miami University

Connie Fears - University of Cincinnati

Kelley Goodrich - Muskingum University

Katie Hill - Ursuline College

Dawn Hundley - Chatfield College

Amanda Patterson - The Ohio State University

Lauren Urban - John Carroll University

Rena Wells - University of Akron

Amy Witt - Otterbein University

Melinda Youngs - Urbana University

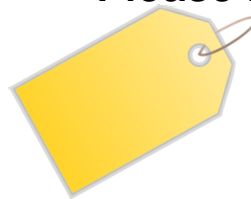


Conference Policies

Please be aware of your institution's ethics policy as related to Ohio Revised Code 2921.43(A) and 102.03 (D) and (E) when participating in conference and non-conference events. If you are a vendor but not exhibiting, please refrain from conducting business in the exhibit area.

Nametags are required for admittance to conference events.

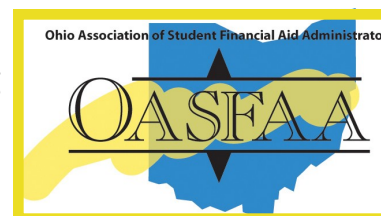
Please be sure to wear your nametag throughout the conference.



Mission Statement

The mission of the Ohio Association of Student Financial Aid Administrators shall be to ensure access to higher education through the promotion of financial aid awareness.

Further, the mission of the Association is to affect public policy initiatives, to promote ethical administration of student aid programs, and to encourage an environment of cooperation among individuals, agencies, organizations and educational institutions to better serve all student populations.





Sponsors and Exhibitors

SPONSORS

Presidential Level: Great Lakes Educational Loan Services, Inc.
Gold Level: EdFinancial Services
PNC Bank
Silver Level: KEMBA Financial Credit Union

EXHIBITORS

American Student Assistance (ASA/SALT)

CampusLogic, Inc.

Citizens Bank

CMD Outsourcing Solutions

College Advantage

Commerce Bank

cuLearn with Thrivent

Discover Student Loans

EdFinancial Services

Elm Resources

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First Marblehead Corporation

Great Lakes Educational Loan Services, Inc.

Inceptia

KEMBA Financial Credit Union

KHEAA

MOHELA

PNC Bank

Sallie Mae

Student Connections

Wells Fargo Education Financial Services

A yellow sticky note with the words 'Thank You!' written in a blue, hand-drawn style. The note is tilted and has a white shadow behind it.

Thank
You!





Conference Menu



Monday Lunch

Mixed Green Salad
Chicken Tortilla Soup
Split Baked Potatoes & Variety of Toppings
Sourdough Rolls & Butter
Gourmet Coffees & Teas, Iced Tea

Monday Dessert Break

Fudge Brownies & Blondies
Gourmet Coffees & Teas

Monday Dinner

Charred Tomato Basil Soup
Greek Salad
Quinoa Salad with Cilantro Vinaigrette
Pesto Grilled Chicken
Garden Pasta with Summer Squash
Preserved Lemon Risotto
Grilled Asparagus & Baby Carrots
Assorted Rolls & Butter
Lemon Biscuits with Grand Marnier, Berries
& Whipped Cream
Gourmet Coffees & Teas, Iced Tea

Tuesday Breakfast

Selection of Chilled Juices
Sliced Fruit and Berries
Assorted Bakery & Spreads
Yogurt Parfaits with Granola, Berries
& Dried Fruit
Breakfast Burritos
Gourmet Coffees & Teas

Tuesday Lunch

Soup Du Jour
Mixed Green Salad
Pasta Salad with Italian Vinaigrette
Assorted Bags of Chips
Herb Roasted Turkey Breast
House Signature Smoked Corned Beef Brisket
Sliced Rolls
Gourmet Coffees & Teas, Iced Tea

Tuesday Dessert Break

Mocha Mousse Cake
Gourmet Coffees & Teas

Wednesday Breakfast

Selection of Chilled Juices
Sliced Fruit and Berries
Assorted Bakery & Bagels
Spreads
Croissant Pinwheels
Gourmet Coffees & Teas

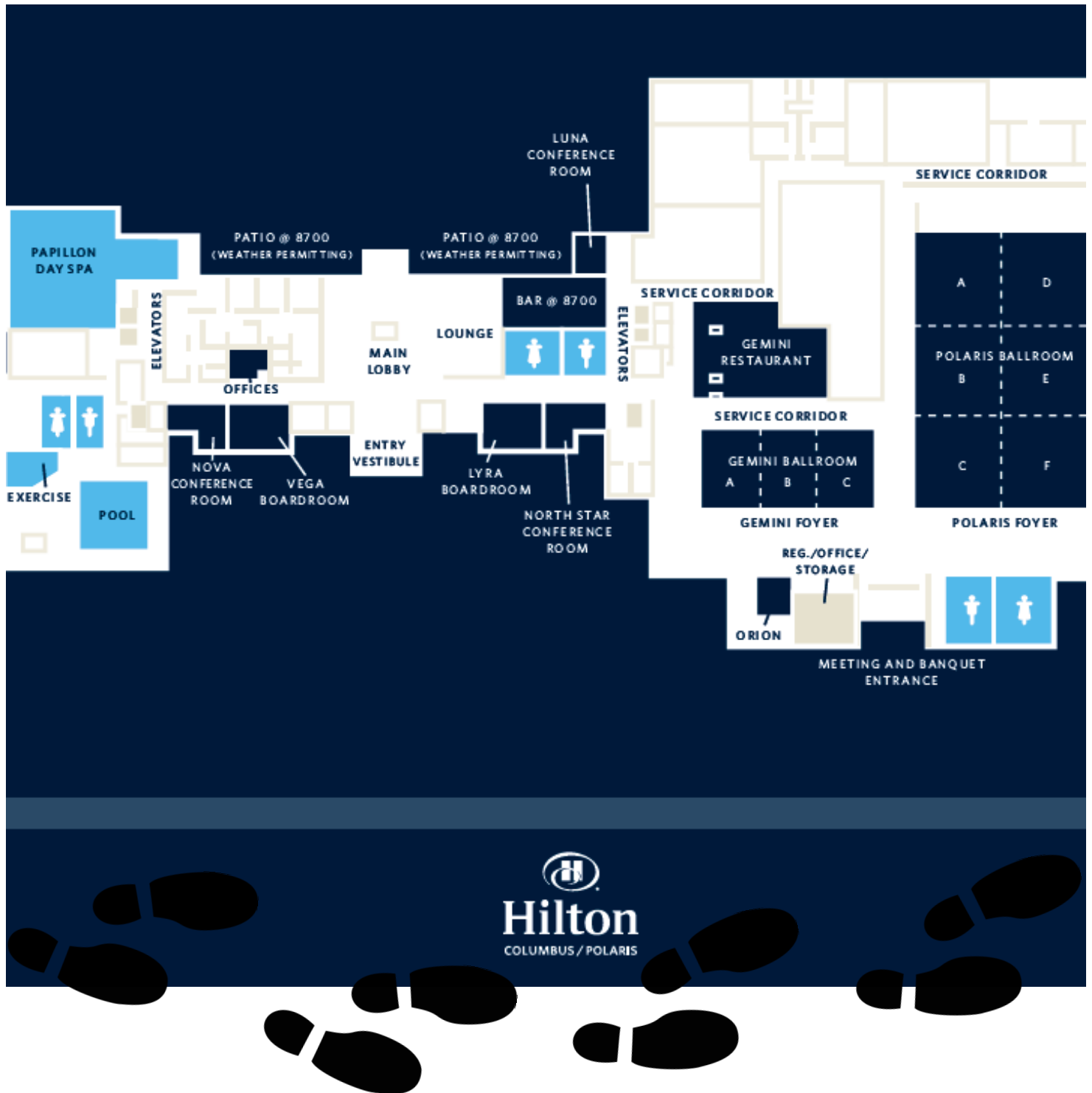
Wednesday Lunch

Cheddar Broccoli Soup
Broccoli Salad with Sweet Lemon Dressing
Iceberg Chop Salad
Stewed Green Beans with Smoked Ham Hocks
Jumbo Macaroni & Cheese
Southern Fried Chicken Drumsticks
Slow-Cooked Pot Roast with Potatoes
Assorted Rolls & Butter
Chocolate Pie
Gourmet Coffees & Teas, Iced Tea

*Bon
Appetit!*



Hotel Map



Monday, May 8, 2017

8:30-11:45am NASFAA Credential Workshop - Polaris F

Packaging and Award Notifications (pre-registration required) - Financial aid packaging involves employing strategies to distribute limited financial aid resources to qualified students to attend the postsecondary school of their choice. The packaging process combines various types of Title IV and non-Title IV aid from federal, state, institutional, and private entities, to help meet the financial need of college students. Rules for packaging some Title IV aid are different from the rules for packaging non-Title IV aid. This credential workshop will walk you through the options and teach you how to employ various packaging methods. At the conclusion of the workshop, you will be qualified to take the credential exam. You will receive a voucher code that covers the cost of the exam.

10:00am-12:00pm Registration & Exhibits Open

12:00-1:30pm Lunch - Polaris ABC
Sponsored by EdFinancial Services
James W. White Award
Keynote: "Let it Go, Just Let it Go"
Kent Rader

1:30-1:45pm Break - Polaris Foyer

1:30-5:00pm Registration & Exhibits Open

1:45-2:35pm Interest Sessions



New Member Welcome: This is OASFAA! - Gemini B

Presenters: Kirby Adams, Sinclair Community College; Renee Lamp, Cuyahoga Community College

Moderator: Kirby Adams, Sinclair Community College

If you are a new or relatively new member, and are attending conference for the first time, this session is for you! This session will provide an opportunity to celebrate your new membership and learn more about the OASFAA organization. This is also a great opportunity to meet other new members, and ask any questions you may have as a first-time attendee!

Satisfactory Academic Progress: From Policy to Application (Part 1 of 3) - Polaris E

Presenter: Angela Johnson, Cuyahoga Community College

Moderator: Carrie Short, University of Akron

This NASFAA Training is offered at no additional cost to your conference registration. At the end of the training, you will be able to understand the basic standards that a school must include in its SAP policy, assess your existing institutional SAP policy and determine if adjustments are appropriate, recognize choices that a school has in determining specific aspects of a school's SAP policy, identify situations that may or may not warrant the extension of utilizing a financial aid warning, financial aid probation, or academic plan, and understand SAP consumer information requirements and what must be provided to prospective and current enrollment students.

Note: Copies of this session's handouts will not be provided at the conference; please print them at www.oasfaa.org.

All Shaken Up – Professional Judgment in the Era of PPY - Polaris F

Presenter: Molly Baumann, Capital University

Moderator: Susan Kannenwischer, Capital University

High tide comes every day just as frequent changes make their way into the financial aid office. The change to using PPY data, though, was a historical change and has implications we haven't fully realized yet. Professional judgment will continue to be impacted by PPY and we will explore how one office is addressing it.

Monday, May 8, 2017

From Application to Graduation: Removing Barriers to Student Success - Polaris D

Presenter: Angela Henry, Strategic Partnerships for Student Connections

Moderator: Jared Nofziger, Valor Christian College

Students face enormous non-academic barriers to successfully navigating their educational experience. This session will explore seven obstacles to student success and share strategies on how to help them stay on track with their academic, financial and career goals.

Overlapping Loans & Loan Proration - Gemini C

Presenter: Ashley Eder, DeVry Education Group

Moderator: Jennifer Toomey, Case Western Reserve University

Overlapping loans and loan proration have been around since the beginning of time with loans, but we still find ourselves with questions and concerns about the best way to calculate these and how to advise our students. The various nuances of loans can be overwhelming, so it's best to start from the very beginning! This presentation is going to start with the basics, to remind ourselves of why these rules exist and the basic foundation of the calculations. Then, the presentation will quickly move into some more involved examples that we'll walk through together, including some examples for our schools that have modules!

2:35-3:00pm

Dessert Break - Polaris Foyer

Sponsored by KEMBA Financial Credit Union

3:00-3:50pm

Interest Sessions

Satisfactory Academic Progress: From Policy to Application (Part 2 of 3) - Polaris E

Presenter: Angela Johnson, Cuyahoga Community College

Moderator: Carrie Short, University of Akron

This NASFAA Training is offered at no additional cost to your conference registration. At the end of the training, you will be able to understand the basic standards that a school must include in its SAP policy, assess your existing institutional SAP policy and determine if adjustments are appropriate, recognize choices that a school has in determining specific aspects of a school's SAP policy, identify situations that may or may not warrant the extension of utilizing a financial aid warning, financial aid probation, or academic plan, and understand SAP consumer information requirements and what must be provided to prospective and current enrollment students.

Note: Copies of this session's handouts will not be provided at the conference; please print them at www.oasfaa.org.

Active Threat Response: Using Lessons Learned - Polaris D

Presenter: Detective Cassandra Shaffer, The Ohio State University

Moderator: Randy Ulses, University of Cincinnati

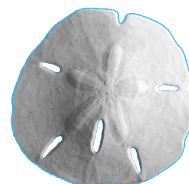
Participants will learn the definition of an active threat, mentality of the suspect, how past events have shaped our response, and hands on techniques for responding to an active threat situation.

Super Manager: Be the Boss Everyone Wants to Work For - Polaris F

Presenter: Greg Carlo, cuLearn with Thrivent; Mary Reshad, Wright State University

Moderator: Mary Reshad, Wright State University

As a manager, overseeing employees' performance is an essential obligation. Yet, it's more than just ensuring a timely schedule of operations and quality production. Organizations that surpass expectations with unmatched success ensure employees receive the necessary support, resources, and guidance to get the job done. It takes a special manager to increase employee engagement and satisfaction in the workplace? It takes a super manager. This session *will help* you at all levels, with the necessary know-how to help your employees grow in their abilities and motivate them to go above and beyond expectations. Participants will explore the qualities, behaviors, skills, and tools to help them become the manager everyone wants to work for.



Monday, May 8, 2017

529 Savings Plans: Updates and Changes - Gemini B

Presenter: Tim Gorrell, College Advantage

Moderator: Judy Cunningham, College Advantage



College Advantage, Ohio's 529 college savings plan has been helping families save and plan for their children's higher education for more than 25 years. With more than \$650 million per year for beneficiaries' higher education expenses - with a large part of those beneficiaries attending school in Ohio. Come hear what updates keep College Advantage one of the leading 529 plans in the country.

How to Plan, Prepare and Pull Off the Perfect High School Financial Aid Night or FAFSA Event - Gemini C

Presenters: Mary Cannon, Hondros College of Nursing; Jeff Johnston, Sallie Mae; MorraLee Keller, National College Access Network

Moderator: Mary Cannon, Hondros College of Nursing

With the changing landscape of FAFSA completion events and the changes in the FAFSA process, it is even more important for Financial Aid professionals to be prepared to "get the word" out to students and parents! Ever wanted to do a FA night for a local high school or plan a FAFSA event, but just don't know how or what to present? Then this is the session for you! This session will provide you with the tools and resources you need to confidently plan and execute the perfect event. Attendees will learn how to plan, prepare and deliver a financial aid night or FAFSA event. The session will include tools and resources needed for the event. The tools and resources will include (but not limited to) a sample planning calendar, sample handouts and presentation.

4:00-4:50pm

Interest Sessions

Satisfactory Academic Progress: From Policy to Application (Part 3 of 3) - Polaris E

Presenter: Angela Johnson, Cuyahoga Community College

Moderator: Carrie Short, University of Akron

This NASFAA Training is offered at no additional cost to your conference registration. At the end of the training, you will be able to understand the basic standards that a school must include in its SAP policy, assess your existing institutional SAP policy and determine if adjustments are appropriate, recognize choices that a school has in determining specific aspects of a school's SAP policy, identify situations that may or may not warrant the extension of utilizing a financial aid warning, financial aid probation, or academic plan, and understand SAP consumer information requirements and what must be provided to prospective and current enrollment students.

Note: Copies of this session's handouts will not be provided at the conference; please print them at www.oasfaa.org.

Race Matters...So Does Gender - Polaris D

Presenter: Emily Haynam, The Ohio State University

Moderator: Randy Ulises, University of Cincinnati

This session will look at implicit biases that none of us can escape. We will start the conversation about why we don't embrace diversity and differences more easily. The conversation will dig deeper than just the concept of why we should be diverse, and talk about the challenges of change in the way we think, feel and act. It is the goal that participants come away understanding that we all have biases, and be able to recognize what role they play in our decision making that could impact our work.

Ten Ways for Students to Lower Their Debt - Polaris F

Presenters: Michael Collins, Case Western Reserve University; Jeff Johnston, Sallie Mae

Moderator: Jeff Johnston, Sallie Mae

There are proven ways that students can lower their student debt before, during, and after their college years. In this session we will explore ten ways for students to lower their student debt throughout their educational career, offering counselors a go-to power point you can use with students. Additionally, you will learn about Case Western's counseling approach to assisting students with high indebtedness in creating a degree completion plan.

Monday, May 8, 2017

Networking and Confidence Building in OASFAA - Gemini B

Presenter: Ginny Biada, Educational Testing Services

Moderator: Amanda Reisinger, Zane State College

In real estate, the buzzwords are "Location, location and location". In most other businesses, the buzzwords are "Networking, networking, and networking!" You may be one of those gifted folks who can walk into a room or sit down at a table full of strangers, start a conversation and begin a friendship. Most of us cannot! This session will look at some tricks and tips for identifying and overcoming some of the obstacles we face when trying to meet new folks or when we find ourselves in a situation where we don't know anyone. If you can immediately engage a stranger in conversation, please come and share with us - we'd love to hear from you!

Constructing a Framework for Dealing with School Closures - Gemini C

Presenter: Adam Dilulio, Cuyahoga Community College; Vena Hill, Columbus State Community College

Moderator: Adam Dilulio, Cuyahoga Community College

On September 6th, after losing the ability to award Federal Student Aid, ITT Technical College announced it's closing of 130 campuses and displacing thousands students in 38 states across the country. As one of the largest school closures in our nation's history and many students are left with no place to transfer, several colleges began to assess their ability to help these students through special course evaluation, credit assessment, and prior learning options to help students to continue their education. From troubleshooting questions about loan discharge options, Pell limits, and credit transferability, colleges have developed a customized strategic enrollment plan to help displaced students. This session will discuss that your college can help students that are impacted by a school closure. We will highlight the enrollment management strategies for communication and collaboration, and obstacles students face when dealing with a school closure.

6:30-7:30pm

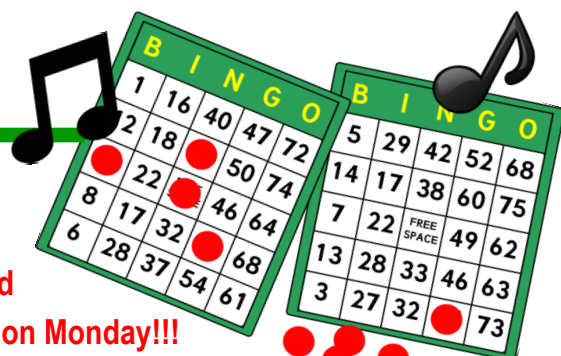
Dinner - Polaris ABC

Sponsored by Great Lakes Educational Loans Services, Inc.

7:30pm

Entertainment - Polaris ABC

Sponsored by PNC Bank



You have all heard of Bingo right? Well hold on to your chips because we are putting a twist on the traditional bingo by replacing the bingo numbers with the names of songs, titles and artists! That's right!!! We'll be playing Music Bingo after dinner on Monday!!!

It's a fun filled and fast paced take on the traditional bingo game. Our host DJ will play 10-15 seconds of music and you will mark off the spots on your bingo cards as you bop your heads and jam to your favorite songs. In addition, get ready to be rewarded!!! The winner after each round will receive a \$25 gift card but you have to play to win. After music bingo, the fun doesn't stop. We will keep the party going with more of your favorite songs and more chances to win BIG with our mystery games. So come and hang out and plan to have a great time with your OASFAA colleagues and friends!



Tuesday, May 9, 2017

7:30-11:30am Registration & Exhibits Open

7:30-8:30am Breakfast - Polaris ABC
Sponsored by EdFinancial Services

8:00-10:00am General Session - Polaris ABC
State Update - Jim Bennett, Ohio Department of Education
NASFAA Update - Karen McCarthy, NASFAA

10:00-10:50am Interest Sessions

Leadership (Invitation Only) - Financial Aid Ethics - Gemini C

Taking the Road to Relevance - Polaris D

Presenter: Thomas Ratliff, Indiana Wesleyan University

Moderator: Randy Ulses, University of Cincinnati

The book *Road To Relevance* addresses factors that professional associations should consider in order to keep their work pertinent to a changing membership. MASFAA leadership have been using the insights from this book as a guide to examine how we can operate in the most meaningful way. Personally I see correlations from these concepts at the individual level as well. Come join in on an exploration of how we can make ourselves more relevant to our employers and profession.

"Who Am I? Who Are You? Who Are We?" - Polaris F

Presenter: Stephen Deaderick, The Ohio State University

Moderator: Judy Cunningham, College Advantage

This session explores social identities, group dynamics, and privilege. During this interactive session, participants will get an introduction to social identities and how they show up in our daily lives. Participants will engage in reflection and dialogue about the unique aspects of their identity while also learning about others.

Opening Doors to Opportunity Through Financial Education - Gemini B

Presenter: Tracy Drechsler, American Student Assistance

Moderator: Jared Nofziger, Valor Christian College

While resumes, cover letters and online profiles are all staples in the job-seekers toolkit, financial capability - including the understanding of personal finance concepts and how to apply them to real-life scenarios - is often an unrecognized but valuable weapon in the employment game. This session opens with a conversation about the personal financial skills that job-seekers can benefit from, including both the knowledge and the tactical application. For example: Budgeting + factoring in student loan obligations; Credit scores and reports + improving yours for job placement; The power of compound interest + the importance of salary negotiation; Investment options + how to take advantage of workplace retirement plans. Resources that can be used, along with strategies to get buy in from colleagues and participants, are provided. Participants are encouraged to share and discuss their own experiences and resources to add to the collective possibility pool!

Advocacy and You - Polaris E

Presenter: Karen McCarthy, NASFAA

Moderator: MorraLee Keller, National College Access Network

This session will touch on the main principles of successful advocacy strategies. An overview will be given of how NASFAA enacts those strategies at the Federal level through relationships with Congressional staffers, the Department of Education, and the Administration. In addition to highlighting useful NASFAA tools and resources, the session will also cover tips and strategies on how to successfully advocate at the grassroots level, and outline how you can plan your own advocacy event!



Tuesday, May 9, 2017

10:50-11:10am Beverage Break - Polaris Foyer
Sponsored by KEMBA Financial Credit Union

11:10-11:30am Regional Meetings **Northeast - Gemini C**
Northwest - Polaris D
Southeast - Polaris F
Southwest - Gemini B



11:10-11:30am Associate Members - Polaris E

11:30am-1:15pm Lunch - Polaris ABC
Sponsored by Great Lakes Educational Loan Services, Inc.
OASFAA Business Meeting
MASFAA Update - Thomas Ratliff, MASFAA President

1:15-4:00pm Registration & Exhibits Open

1:20-2:10pm Interest Sessions

Leadership (Invitation Only) - Performance Management - Gemini C

Making Connections & Building Relationships with Students from Different Cultures & Generational Gaps - Polaris D

Presenter: Brett Welsch, Columbus State Community College

Moderator: Vena Hill, Columbus State Community College

Come and discuss how cohort based student groups like MAN Initiative, Women's Connection, Diversity Learning Community (PONO), Advanced Leadership Series (CSLS Advanced-Columbus State Leadership Society) sponsoring various cultural celebrations, workshops and other special events have a positive impact in helping students with diverse backgrounds feel connected academically, socially and focused on a pathway towards completion.

Ready, Set, Active: Pell Calculation & Recalculation Dates - Polaris F

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

Moderator: Carolyn McCluskey, Baldwin Wallace University

In this session we will address the different ways in which Pell recalculation dates may be utilized and how they impact the awarding process. Case scenarios will be provided to illustrate recalculation rules and census dates in various situations as students add and drop courses, including in programs offered in modules.

Reviewing & Rethinking Presentations - Gemini B

Presenter: Adam Dilulio, Cuyahoga Community College; Jennifer Toomey, Case Western Reserve University

Moderator: Adam Dilulio, Cuyahoga Community College

This session will discuss best practices for creating and executing an engaging presentation. We will discuss working with various platforms such as MS PowerPoint and Prezi. Engaging and captivating your audience, especially when you are dealing with students, can be incredibly challenging. We will discuss how to make your presentations exciting and ways to use "gamification" (presenting/teaching with game playing methods) in your sessions.

Tuesday, May 9, 2017

Work Life Balance/Stress Management - Polaris E

Presenter: Denise Eder, cuLearn with Thrivent

Moderator: Greg Carlo, cuLearn with Thrivent

What does “Having It All Mean”? Does that mean doing everyone’s job? Are you always juggling too many things at once? Are you stressed about being stressed? This session will give you information from some of the experts – Stephen Covey & David Allen, as well as the learnings from a mother of three. We will discuss real life situations and experiences and help participants with balancing work, family life and everything else in between.

2:20-3:10pm

Interest Sessions

Leadership (Invitation Only) - Resume Building - Gemini C

Creating a Climate in which LGBTQ People Matter - Polaris D

Presenter: Kathryn M. Plank, Otterbein University

Moderator: Jesse McMillan, Capital University

Everyone who works at a college or university plays an important role in creating a climate where people not only feel welcome, but also know that they are an integral part of the community. In this session, we will examine the often hidden ways that institutions can reinforce bias based on gender identity and sexual orientation. Then, while understanding that all identities are intersectional, we will explore some considerations of particular relevance to LGBTQ people, and more specifically LGBTQ college students. Finally, we will discuss not just ways to accommodate LGBTQ people, but ways that learning from LGBTQ community members can make our institutions better places for everyone.



Who’s Defaulting and Why: An In-depth Look at the Root of Loan Default - Polaris F

Presenter/Moderator: John Brown, Great Lakes Educational Loan Services, Inc.

In this session we will define what a defaulted borrower analysis is and review the timing of loan default. We will also look at the reasons for defaulting as well as the characteristics of loan defaulters. Finally, we will examine default factors unique to your institution and walk through how to conduct your own defaulted borrower analysis.

8 Big Ideas for Student Retention - Gemini B

Presenter: Angela Henry, Student Connections

Moderator: Melanie Weaver, Ohio Northern University

Increased transparency and a greater focus on outcomes are leading to new strategies aimed at improving student retention and, ultimately, graduation rates. This interactive session will explore eight ideas that are proven to be effective at boosting retention rates. Participants will have the opportunity to share strategies that have worked at their institutions.

Survey Data Gathering - Polaris E

Presenter: Mary Cannon, Hondros College of Nursing; Susan Kannennwischer, Capital University

Moderator: Amanda Reisinger, Zane State College

Lions, Tigers and Bears – OH MY!!! Or, the dreaded surveys also known as IPEDS, College Board, CDS, Peterson’s, U.S. News, Princeton Review, Wintergreen Orchard House. Are you burdened by numerous surveys every year? Are you looking for help to “tackle the beast”? This session will offer a practical approach to managing the survey process.

3:10-3:35pm

Dessert Break - Polaris Foyer

Sponsored by KEMBA Financial Credit Union

Tuesday, May 9, 2017

3:35-4:25pm

Interest Sessions

Leadership (Invitation Only): The 5 Languages of Appreciation - Gemini C

DACA and Undocumented Students - Polaris D

Presenter: Bowen Marshall, The Ohio State University

Moderator: James McDougal, KEMBA Financial Credit Union

DACA and Undocumented statuses as it relates to financial aid. Very fluid topic currently and updates will be provided.

Half the Questions/All the Aid - Polaris F

Presenter/Moderator: MorraLee Keller, National College Access Network

The challenge of change is upon us. NCAN has spent over a year working to create a streamlined version of the FAFSA that will require approximately half the current questions but produce similar results for aid offices. NCAN and NASFAA's simplification proposals are similar but not exact. Come prepared to provide feedback to NCAN as we continue to refine our prototype to be ready for reauthorization. We want everyone to collaborate as we make a streamlined FAFSA a "force of the future."

A Deeper Understanding of the 150% Direct Subsidized Usage Limit Rule - Polaris E

Presenter: Ashley Eder, DeVry Education Group; Jennifer Toomey, Case Western Reserve University

Moderator: Vicki DeLucas, Ohio University Zanesville

The challenging change of understanding when Subsidized Usage Limit Applies (SULA) is certainly a forced to be reckoned with as we continue to drive towards the future! This presentation will help you understand the basics of the 150% Direct Subsidized Usage Limit rule and when it applies to students. This presentation will be a group effort as we walk through examples from a student reaching their limit, talking through advising tips, and discussing some common characteristics that put students at most risk for reaching their limit before they finish their program. We will also discuss the importance of counseling to these students, and ensure an understanding of the counseling requirements around these not so new regulations. By the end of the presentation, we hope we all walk away with a conversational understanding of this rule, and how we can better serve our students.

New Member Follow-Up: What Now? - Gemini B

Presenters: Kirby Adams, Sinclair Community College; Renee Lamp, Cuyahoga Community College

Moderator: Kirby Adams, Sinclair Community College

Congratulations New Members! You've made it through the second day! Or, maybe you're a new member who was unable to attend the first New Member session on Monday. Whatever the case, this session will focus on how you can become more involved in OASFAA and exemplify the opportunities the organization can afford you on both a professional, and personal level.

4:35-5:30pm

General Session - Polaris ABC

"The 411 on 399" - Zack Goodwin, U.S. Department of Education

With the same income and tax information being used on the 2016-2017 and 2017-2018 FAFSAs, the likelihood of conflicting information is increased. In this session we will discuss when such conflicts must be resolved and explore how verification both relates to, and is distinct from, resolving conflicting information.

6:00-7:00pm

President's Reception - Polaris Foyer

Sponsored by PNC Bank



Wednesday, May 10, 2017

7:30-10:00am	Registration Open
7:30-8:30am	Continental Breakfast - Polaris ABC Sponsored by PNC Bank
8:30-9:45am	Federal Update - Polaris ABC Zack Goodwin, U.S. Department of Education
9:45-10:15am	Break/Hotel Check Out - Polaris Foyer
10:15-11:05am	Interest Sessions



Cross Campus Communication - Polaris D

Presenter: Misty Amacher, CR Barclay and Jessica Mautz, Central Ohio Technical College & Ohio State Newark

Moderator: Meghann Fraley, University of Rio Grande

The ability to communicate effectively is one of the most valuable skills we use within the workplace. Many of us work on campuses where communications between different departments can be challenging. In this session, we will discuss the various communication struggles from the perspective of the bursar, admissions, and financial aid offices. We will discuss these challenges and give guidance regarding cross campus communications.

HEI Training - Polaris E

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

Moderator: Tamika Braswell, Ohio Department of Higher Education

This session will provide an overview of the state financial aid programs; Nurse Education Assistance Loan Program (NEALP), Ohio College Opportunity Grant (OCOG) and Ohio War Orphans Scholarship (WOS) and cover the financial aid side of the HEI System (restricted outputs, queries, submitting payment & adjustment files and more).

Credit Basics and Understanding Private Student Loan Underwriting - Polaris F

Presenter: Michael Jones, Citizens Bank

Moderator: James McDougal, KEMBA Financial Credit Union

This session will provide information on the basics of credit, how credit works, and how FICO scores are calculated. This session will also provide information on private loan underwriting - what elements are factored into the underwriting process and how they are evaluated by lenders.

Technology Applications for the Financial Aid Office - Gemini C

Presenter: Wes Brothers, Ohio Christian University

Moderator: Dave Bowman, Great Lakes Educational Loan Services, Inc.

What better way to face the challenges of change than by learning how to wield technology to improve performance and efficiency in the Financial Aid Office. The tips and tricks you learn here are sure to CHANGE your life!



Wednesday, May 10, 2017

11:10am-12:00pm Interest Sessions

Verification for 2017/2018 - Polaris D

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

Moderator: Ashley Eder, DeVry Education Group

This session will include a discussion of the verification requirements for the 2017-18 FAFSA cycle, as well as reminders about verification updates for 2016-2017.

Tapping into the Future: Social Media in the Financial Aid Office - Polaris F

Presenter: Jordan Bruner, Hondros College of Nursing

Moderator: Emily Goldman, Hondros College of Nursing

Is your financial aid office on Twitter or Instagram? Your students are. This session will provide an overview of social media platforms and best practices for creating a social media plan for your financial aid office.

Financial Aid Jeopardy - Polaris E

Presenter: Raina Chezem, ELM; Heidi Sisson, First Marblehead

Moderator: Mary Reshad, Wright State University

A fun interactive way to test your financial aid knowledge and learn something new! This information will directly assist you in the 2016-17 academic year and beyond. Categories include: FAFSA, Potpourri, Verification, Student Loans, and more. Join us in a game of Financial Aid Jeopardy where you will be split up in teams to see who takes home the win.

Ohio National Guard Scholarship Program - Gemini C

Presenter: Tiffany Kleines, Ohio National Guard Scholarship Program

Moderator: John Brown, Great Lakes Educational Loan Services, Inc

The history of the Ohio National Guard Scholarship Program and the way moving forward. The program has been the same for the last 30 years; we will be discussing the upcoming changes and advancements that will allow us to function more effectively, and provide service and support to our military service members in the Ohio National Guard.

12:10-1:15pm

Lunch - Polaris ABC

Sponsored by Great Lakes Educational Loan Services, Inc.

Support Professional Award

Passing of the Gavel



Future Training

NASFAA Conference

June 26-29, 2017

San Diego, CA

MASFAA Conference

October 8-11 2017

Dayton, OH

Federal Student Aid

November 28-December 1, 2017

Lake Buena Vista, FL



Check the OASFAA calendar at www.oasfaa.org
for additional training opportunities.



Keynote Speakers

Kent Radar

Known as the "World's Cleanest Comedian and Speaker," Kent Rader helps people and associations learn and experience how laughter matters in reducing stress and building quality organizations. Kent graduated from William Jewell College in Liberty, Missouri with a B.S. in Accounting. He survived five years in public accounting and twelve years as C.F.O. and C.E.O.



of hospitals before becoming a professional speaker in 1997. Kent has authored the stress reduction book titled *Let It Go, Just Let It Go* and co-stars with Jan McInnis in the Baby Boomer Comedy Show, *Clean Comedy for People Born Before Seat Belts, Safety Helmets, and Facebook*. He has been heard on NPR's *Talk of the Nation*, Sirius Satellite radio. Kent is the winner of the Branson Comedy Festival and has been seen on Comcast's comedy show, *Who's Laughing Now*. His clean, stand-up comedy DVD-CD titled *Kent Rader: The Grand Wizard of Comedy* was released on August 11, 2014.

Jim Bennett



Jim Bennett serves as the Vice Chancellor for Finance and Data Management at the Ohio Department of Higher Education. In this capacity, Bennett oversees all financial activities for the Ohio Department of Higher Education, including the development of operating and capital budget requests, implementation of policies and procedures for State subsidy support of public higher education institutions, financial aid and audit functions, and the collection and reporting of statewide higher education data.

Bennett has held prior positions as Senior Higher Education Analyst and most recently as Chief of the Education Section at the Ohio Office of Budget and Management (OBM), where he oversaw budget and policy analysis related to Ohio's 37 public institutions of higher education and 1,000 K-12 public education entities.

During his tenure with the State, Jim has worked extensively on numerous statewide higher education funding consultations and initiatives and he is a former member of the National Association of State Budget Officers' (NASBO) Higher Education Finance Advisory Board.

Bennett holds a Bachelor of Science degree, a Master of Science degree, and a Master's degree in Public Policy and Management, all received from The Ohio State University.



Keynote Speakers



Karen McCarthy

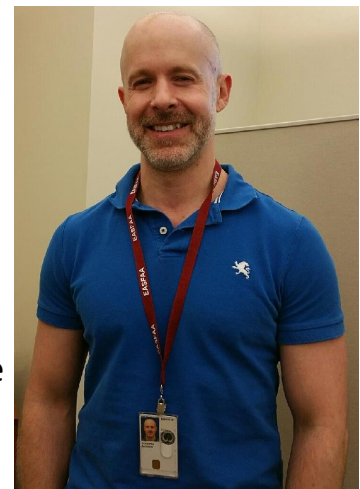
Karen McCarthy is the Director of Policy Analysis at NASFAA. She began her career in student aid working in the financial aid offices at several large, 4-year institutions, including Boston University, Miami University of Ohio, and The Ohio State University. She serves on the Department of Education's FAFSA Advisory Group and has served as NASFAA's representative at negotiating rulemaking sessions, both as a resource for school-based negotiators and as a negotiator herself. She has worked with various NASFAA task forces including Reauthorization, Campus-based Allocation Formula, Public Service Loan Forgiveness, Graduate and Professional Issues, FAFSA Simplification, "One Grant One Loan," and R2T4.

A native of Massachusetts, she earned a bachelor's degree from Cornell University and a master's degree from The Ohio State University.

Zack Goodwin

Zack Goodwin joined the Education Department training team in 2014, after serving for 20 years in higher education administration at graduate schools, liberal arts colleges, and comprehensive universities in the Midwest and New England. Most recently he acted as Harvard University's Financial Aid Compliance and Training Officer and as the University's financial aid director for continuing education, leading financial aid programs for undergraduate, graduate, certificate and high school students.

Zack received a Bachelor of Arts from Bennington College in Vermont, his Master of Public Administration from the University of Oklahoma, and his Master of Science in kinesiology from the California University of Pennsylvania. In addition to his training experience with ED, he has developed leadership curricula for schools and financial aid professional associations, and works in his free time as a personal fitness trainer.





Keynote Speakers

Thomas Ratliff



Thomas Ratliff is the Associate Vice President of Financial Aid at Indiana Wesleyan University and also currently serves as President of the Midwest Association of Student Financial Aid Administrators (MASFAA). He started working in

Financial Aid during the Reagan era at Lincoln Technical Institute in Indianapolis and has contributed to proprietary, public and private colleges ever since including positions at Interactive Learning Systems of Atlanta, Georgia; Kennesaw State College of Georgia; Southwestern Oklahoma State University and Indiana State University.

Thomas has conducted training for the U.S. Department of Education, the College Board, BKD CPAs and Advisors, Southern Association of College and University Business Officers (SACUBO) and the National Association of Student Financial Aid Administrators (NASFAA). He has been quoted on financial aid concepts in The Chronicle of Higher Education and the New York Times.

Thomas earned his bachelor's degree from Ball State University majoring in Legal Administration and obtained his master's degree from Kennesaw State College with a concentration in Human Resource Management. He and his wife Sheila have two sons, Josh and Elijah; they also have two dachshunds and a wild Texas lizard who stowed away in their car. They enjoy vintage car racing and shows in their two 1960's Chevy Corvairs.

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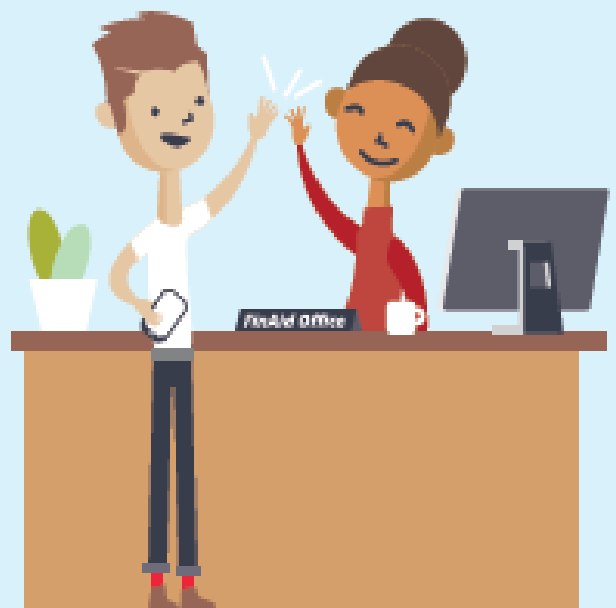
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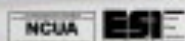




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