

“Refresh, Renew, Refocus”
OASFAA 2020 Spring Conference
Renaissance Columbus Westerville-Polaris Hotel
March 18 – 20, 2020
Agenda

Wednesday March 18, 2020

9:00 AM – 10:00 AM	NASFAA Credential Registration Check-in
10:00 AM – 12:00 PM	NASFAA Credential Direct Loans
10:00 AM – 12:00 PM	Registration/Exhibits Open
11:00 AM – 12:00 PM	Welcome to your first OASFAA conference First time at the OASFAA conference? Join us for an introduction to our conference, meet our President, and learn how to navigate the schedule. We’ll also be sharing recommendations for your evenings and answering any questions you may have about OASFAA.
12:00 PM – 1:15 PM	Open Session/Lunch
1:30 PM – 3:00 PM	NASFAA Credential Direct Loans (Continued)
1:30 PM – 5:00 PM	Registration/Exhibits Open

Interest Sessions

1:30 PM – 2:20 PM

- How America Values and Pays for College

Presenter: **Ed Recker**, Sallie Mae

Moderator: **Ed Recker**, Sallie Mae

How America Pays for College 2019, a national study by Sallie Mae and Ipsos, illustrates the resources families use to pay for college, particularly their use of financial aid and the role of student loans. It also 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.

- 5 Ways student loans impact credit

Presenter: **Becky Davis**, Ascendium Education Solutions

Moderator: **Susan Kannenwischer**, Columbus College of Art & Design

When your students borrow federal loans, do they understand the impact it will have on their credit reports? Unfortunately, many students don’t—but they should. Actions taken on their loans will determine whether they’ll have a favorable or unfavorable credit history. Making good decisions can result in them being able to get job, car, or home but poor ones can diminish their options. Join us as we have identified the five ways federal student loans impact credit and what borrowers can do to build a good credit report

- Business Etiquette

Presenter: **Deb Gossman**, College Ave Student Loans

Moderator: **Deb Gossman**, College Ave Student Loans

Business etiquette and manners have much to do with the Golden Rule - treat others as you would want to be treated. This session will guide you through mannerly ways to engage with students, families (including your own), colleagues, and fellow conference attendees. Topics will include but will not be limited to: •Appropriate greeting and handshake •Proper introductions – “How would I introduce Queen Elizabeth II to my sister-in-law?” •Dining etiquette •Writing thank-you notes •Rules for effective business/email/phone correspondence •Polite conversation •How to politely diffuse difficult situations

Wednesday, March 18, 2020 Continued...

Interest Sessions

1:30 PM – 2:20 PM

- Security Breach Prevention

Presenter: **Greg Gammino**, ELM Resources

Moderator: **Dave Bowman**, Ufi

Whether it's Equifax, CapitalOne, DoorDash, or Yahoo, security breaches are in the news. Join ELM Resources as we explore different types of breaches, hacker motivations and techniques, and what we can all do to help prevent them. Topics to include phishing scam avoidance, safer handling of PII, email compromises, and notable breaches in the news.

2:20 PM – 2:45 PM Dessert Break

Interest Sessions

2:45 PM – 3:35 PM

- VA Education Benefits

Presenter: **Harry Dulick**, U.S. Department of Veteran Affairs – Cleveland Regional Office

Moderator: **Tamika Braswell**, Ohio Department of Higher Education

If you're a higher education college administrator or school certifying official in need of resources to support and create quality connections with student Veterans, this session is for you. Come and find information about the changes to the GI Bill, certification issues, Compliance Surveys and more. This session will offer resources that will help you assist student Veterans pursuing education and training with VA benefits.

- Understanding Student Loan Refinancing

Presenter: **Michael Jones**, Citizens Bank

Moderator: **Ed Recker**, Sallie Mae

Student loan debt totals \$1.5 trillion+ and continues to increase as more students and parents turn to private and federal student loans to help pay for college. As a leader in student lending, we see young professionals postponing goals like traveling, home buying and saving for retirement because of their student loan debt. It's important that these borrowers understand student loan consolidation and refinancing options so they're ready to achieve their next milestone. This session provides an overview of private student loan refinancing, factors to consider before refinancing, how borrowers should prepare for the application process and some approval factors borrowers should consider.

- Sharpening your skills for tough conversations and solutions to end results

Presenter: **Becky Davis**, Ascendium Education Solutions

Moderator: **Andrea Morrow**, Owens Community College

Having tough conversations, whether it's with your staff, co-workers, or students, are never easy. They can make you feel nervous or stressed—however tough conversations are inevitable in every work environment. Your ability to diffuse anger and frustration during tough conversations and create a problem-solving approach is an important skill to have. During this session we'll help you sharpen your skills for handling tough conversations positively and effectively with proven techniques.

- Financial Literacy Isn't Just For Our Students

Presenter: **Tim Clark**, New York Life

Moderator: **Mary Cannon**, Hondros College of Nursing

As Financial Aid Professionals, we spend countless hours educating our students on numerous topics related to finance, financial literacy and their futures. Questions: Have you ever or have you recently taken a look at your own "financial health"? Are you planning for your future? Are you taking advantage of all of the benefits you are afforded? In this session, we are going to explore tools and techniques to ensure financial stability. Tim Clark, a highly experienced Financial Services Professional, will present financial literacy and strategies in an upbeat and engaging presentation for us – financial aid professionals!"

Wednesday, March 18, 2020 Continued...

3:35 PM – 3:55 PM Beverage Break

4:00 PM – 4:50 PM

- Retaining First Generation/ Low Income Students

Presenter: **Dr. Lisa Holstrom**, EdD, University of Cincinnati

Moderator: **Amy Snow**, Ohio Dominican University

Learn about how the University of Cincinnati is shaping their first generation/ low income students through a new coaching program they have piloted on campus and find out what role Financial Aid professionals play in the student's support village.

- Administering Disbursements

Presenter: **David Bartlett**, Department of Education

Moderator: **Melanie Weaver**, Ohio Northern University

This session will describe the timeframes for disbursing Title IV funds, the amounts and requirements for schools to follow in various situations.

- There can be Joy after mourning (dealing with and addressing grief)

Presenter: **Christina Napier**, Kent State University

Moderator: **James McDougal**, KEMBA Financial Credit Union

Grief and mental health among diverse populations is often a taboo subject. Unconfronted grieving can lead to anxiety, depression or even suicide. Many do not seek help or even acknowledge that there is a need for assistance, thus seriously affecting the overall quality of life. In this session we will refocus our approaches to the grieving process. We will look at the five most common stages of grieving and gain further understanding, of how to support or recognize warning signs of complicated grief that may warrant professional help.

- How to build a training manual

Presenter: **Emily Goldman**, Hondros College of Nursing

Moderator: **Mary Cannon**, Hondros College of Nursing

Did you major in financial aid? No one can major in financial aid. We learn financial aid on the job and the training manual is the foundation. This session will highlight things you can do to help your employees get the most out of your training manual. We will discuss essential elements, how to design a template, benefits of an accurate and relevant manual, and real-life examples.

5:30 PM – 6:30 PM

President's Reception

6:30 PM – 8:30 PM

OASFAA Dinner

8:30 PM – 10:30 PM

Entertainment-Bowling at Star Lanes

Thursday March 19, 2020

7:00 AM – 11:45 AM	Registration & Exhibits Open
7:30 AM – 8:30 AM	Breakfast
8:00 AM – 8:30 AM	OASFAA Business Meeting
8:30 AM – 9:45 AM	General Session: State Update, MASFAA Update

Interest Sessions

9:55 AM – 10:45 AM

Business Solution Sessions

- Your Student's Success; it's in our DNA!
Presenter: **Becky Davis**, Ascendium; **Roger Eldridge**, Ascendium
Moderator: **Greg Carlo**, Thrivent Financial

Some students face obstacles and challenges which prevent them from unlocking their full potential. Your goal to guide, encourage, and support them on their path to success may benefit from a boost. Attigo® offers a new generation of tools and services that can help improve persistence, turn delinquency into repayment success, and empower your students to make solid financial choices. We used our decades of experience to build a suite of proven products that are easy to implement and cost-effective. Join this session to learn how we can help drive students to degree completion as well as lifelong success.

- Credible is leading independent, digital consumer
Presenter: **Dennis Wentworth**, Credible
Moderator: **Jenn Toomey**, Case Western Reserve University

Credible is the leading independent, digital consumer student loan marketplace in the United States. Come learn how your institution can provide our proprietary technology platform to your students/parents to instantly compare, personalized rates, in an impartial manner from multiple lenders, without impacting their credit score.

- Weird Ways Students Are Paying for School
Presenter: **Daniel Gonzales**, Campus Logic
Moderator: **Calvin Butler**, Cuyahoga Community College

55% of students reporting they've run out of money three or more times in the past year. Where do your students turn when they have unexpected higher education bills they can't pay? Many drop out, taking debt with them but no degree. Others turn to part-time jobs and side hustles. Join this session to learn about seven weird ways students are paying for school and the potential wins and risks associated with them. You will also learn about innovative, safe alternatives in use at schools nationwide, including CampusLogic's SponsoredScholar.

- Empowering Bright Futures™
Presenter: **Rick Gallagher**, Ascent
Moderator: **John Brown**, Capital University

The problem? College is expensive and students lack access to funds to pay for it. The solution? Ascent is the leading national lender for NON-COSIGNED Loans based off a student's GPA, major and future predicted income. Aside from giving students more opportunities to pay for college with or without a cosigner, Ascent thinks outside of the box on how to reach students where they are. From social media scholarship giveaways to money-saving apps and exclusive content, join us for a discussion to learn innovative ways to connect with students helping them make better financial decisions today and beyond.

10:45 AM – 11:00 AM BREAK

Thursday, March 19, 2020 Continued...

Interest Sessions

11:00 AM – 11:50 AM

- Lean Process

Presenter: **Brenda Dillon**, Kent State University; **Pam LaFleur**, Kent State University

Moderator: **Christina Napier**, Kent State University

Refresh, renew and refocus your procedures using LEAN tools that can help improve your processes and deliver better customer service to students and campus partners. Attendees will complete a mapping exercise as part of the program.

- Mental Health of Students

Presenter: **Kevin Berg**, Cuyahoga Community College; **David Nardecchia**, Cuyahoga Community College

Moderator: **Adam Dilulio**, Cuyahoga Community College

There are multiple facets of mental health and the relationships people have, drug or alcohol abuse, or the environment can effect it. This session will cover the importance of understanding mental health in our students, being able to identify when a student might be struggling emotionally, and knowing how to help them or connecting them with the appropriate resources

- Enrollment Management

Presenter: **Michelle Trame**, University of Illinois; **Betsy Johnson**, Bowling Green State University

Moderator: **Betsy Johnson**, Bowling Green State University

The Financial Aid Office is one of the keys to having a successful Enrollment Management Unit. In this session two experienced Financial Aid Director's will share information about how their financial aid offices work within an Enrollment Management model. They will share information about their structure and provide examples of what EM looks like at their respective institutions

- Verification

Presenter: **Matthew Kirksey**, University of Akron

Moderator: **Mary Reshad**, Wright State University

This session will be formatted to address common questions regarding verification procedures. Bring your questions and insights as we share best practices with one another

- GearUP Ohio presents-Bridges: Supports for Aging out Youth you Serve

Presenter: **Jamole Callahan**, Child and Family Health Collaborative of Ohio; **Doris Edelmann**, Child and Family Health Collaborative of Ohio

Moderator: **Dave Bowman**, Ufi

Thousands of young people each year age out of Ohio's foster care system at 18 years of age. The Bridges Program helps those youth between the age of 18-21, with supports to lead them to self-sufficiency. This workshop provides information on both financial and supportive services for youth who attend post- secondary education.

We want the participants to learn about the supports for former foster youth attending post-secondary education

12:00 PM – 1:50 PM

Lunch

OASFAA Awards

NASFAA Update

12:00 PM – 4:00 PM

Registration/Exhibits Open (Closed during lunch)

Thursday, March 19, 2020 Continued...

Interest Sessions

2:05 PM – 2:55 PM

- HEI Training

Presenter: **Tamika Braswell**, Ohio Department of Higher Education; **Ramah Church**, Ohio Department of Higher Education; **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) in the new HEI System for viewing queries, file submissions, and more.

- Talk Saves Lives: Suicide Prevention

Presenter: **Bill Hesse**, American Foundation for Suicide Prevention

Moderator: **Kirby Adams**, Sinclair Community College

A community-based presentation that covers the general scope of suicide, the research on prevention, and what people can do to fight suicide.

- LGBTQIA & Student Support

Presenter: **Jeremy Torres**, Denison University

Moderator: **Judy Cunningham**, Ohio Tuition Trust Authority

This session presentation is on LGBTQIA and Student Support

- NASFAA Topic Advocacy and you

Presenter: **Megan McClean Coval**, NASFAA

Moderator: **Morralea 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

- Need Analysis #1 Hand Calculation

Presenter: **Faith Phillips**, Central Ohio Technical College & Ohio State Newark; **Susan Kannenwischer**, Columbus College of Art & Design

Moderator: **Calvin Butler**, Cuyahoga Community College

Learn the basics of Federal Methodology and complete an EFC calculation by hand for an independent student.

- Associate Member Meeting

Moderators: **Jenn Toomey**, Case Western Reserve University; **John Brown**, Capital University

2:55 PM – 3:15 PM Snack and Beverage Break

Thursday, March 19, 2020 Continued...

Interest Sessions

3:20 PM – 4:10 PM

- Best Practices in Title IV Reconciliation (Panel)

Panel Members: **Todd Everett**, Mount Carmel College of Nursing; **Emily Goldman**, Hondros College of Nursing, **Shelia Nelson-Hensley**, Belmont College; **Matt Moore**, Sinclair Community College

Moderator: **Jayne Jarrett**, Ohio Northern University

Join a panel discussion to discuss best practices on Title IV Reconciliation.

- Mental Health of Higher Education Staff

Presenter: **Kevin Berg**, Cuyahoga Community College; **David Nardecchia**, Cuyahoga Community College

Moderator: **Adam Dilulio**, Cuyahoga Community College

There are multiple facets of mental health and the relationships people have. This session will cover the importance of understanding mental health for professionals while working in busy and stressful environments. We have learned in the past how to identify when a student is struggling emotionally, but do we know how to help ourselves. Let us see what resources we can utilize to keep the stamina we need to work in Higher Education

- Best Practices in comparing and searching for private loans

Presenter: Raina Chezem, ELM Resources

Moderator: Raina Chezem, ELM Resources

Navigating the financial aid process can be a daunting task. Coming together as a financial aid community to share best practices, we can take a proactive approach in providing families with detailed information that will allow them to make an informed decision on a product that fits their specific needs. Come join us for this informative session as we take a look from the student and parent perspective when searching for a private loan. Group-share some key guidelines and tools to help your school develop a plan to move forward.

Interest Sessions

4:20 PM – 5:10 PM

- How to help student's apply for winnable scholarships and beware of fraud

Presenter: **Daniel Gonzales**, Campus Logic; **Ken Downs**, Campus Logic

Moderator: **Michael Jones**, Citizens Bank

65% students say they would like help finding scholarships, and it can feel like you're already moving mountains to help students search, vet, and apply for these opportunities. Limited time and energy make this process frustrating for everyone involved. What if there was a better way? This session will provide your team helpful tips to transform your office into a vessel for student financial success.

In this session we'll discuss:

Scholarship management techniques

How to build a vetted and sustainable pool of scholarships

Persuasive methods to boost scholarship applications and awards

- Need Analysis #2

Presenter: **Faith Phillips**, Central Ohio Technical College & Ohio State Newark; **Susan Kannenwischer**, Columbus College of Art & Design

Moderator: **Calvin Butler**, Cuyahoga Community College

Build on the knowledge gained in Need Analysis #1 by completing an EFC hand calculation for a dependent student.

Thursday, March 19, 2020 Continued...

Interest Sessions

4:20 PM – 5:10 PM BOF Breakouts

These breakout sessions offers a chance to connect and collaborate with other colleagues who manage specific areas at different institutions.

- Loans
Moderator: **Shelia Nelson-Hensley**, Belmont College
- Federal Work Study
Moderator: **Amy Snow**, Ohio Dominican University
- Verification
Moderator: **Jenn Toomey**, Case Western Reserve University
- Pell
Moderator: **Jayme Jarrett**, Ohio Northern University
- Customer Service
Moderator: **Kirby Adams**, Sinclair Community College

5:30 PM – 7:30 PM Dinner on your own

7:30 PM – 11:00 PM President's Lounge

Friday March 20, 2020

7:30 AM – 10:00 AM Registration Open

7:30 AM – 8:30 AM Breakfast (light)

Interest Sessions

8:30 AM – 9:20 AM

- 5 Keys to Effective Collaboration: Creating an Engaged Team that Delivers
Presenter: **Lynne Hull**, Franklin University
Moderator: **Mary Reshad**, Wright State University

We all talk about the importance of team collaboration, but it's a lot more than just getting along. It's about establishing an environment that produces long-lasting, productive relationships that lead us to better ideas and outcomes, all while making our work more fun and enjoyable. Sounds easy, right? This interactive session will explore 5 critical keys that teams need to effectively collaborate, including a hands-on activity that will require some savvy collaboration in small groups. While the presenter will share some best-practices around collaboration, attendees should expect to join in and share their experiences to augment the learning of the group.

- Why Repayment Rates are the new CDR
Presenter: **Dave Deibel**, ECMC
Moderator: **Deb Gossman**, College Ave

As a bipartisan effort continues in DC to reauthorize the HEA, there is a growing interest in creating more institutional accountability when it comes to student success. Student loan repayment rates are now included in a number of different legislative proposals to be used in combination with CDR's or to ultimately replace them as an accountability metric. This session will update you on the recent legislation and provide background on repayment rates and how they may be used going forward.

Friday, March 20, 2020 Continued...

Interest Sessions

8:30 AM – 9:20 AM

- Understanding the Generation Gap Funding GenZ and Millennials

Presenter: Jane Lemke, Common Bond; James McDougal, KEMBA Financial Credit Union

Moderator: Jenn Toomey, Case Western Reserve University

In this session we will explore the expectations and mindset of GenZ students and consider how they contrast with millennials. We will enter the minds of your GenZ 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.

- R2T4 Essentials

Presenter: **David Bartlett**, Department of Education

Moderator: **Morralea Keller**, National College Access Network

New to the R2T4 process or looking for a refresher, please plan to attend the Return to Title IV (R2T4) Essentials presentation. We will tour the basics of R2T4 policies and the proper timeframes in which to complete the calculation.

Interest Sessions

9:30 AM – 10:20 AM

- A Journey Beyond the Comfort Zone: Conversations Across Differences

Presenter: Theresa McKenzie, Ohio University Southern; Robert Pleasant, Ohio University Southern

Moderator: James McDougal, KEMBA Financial Credit Union

Our thoughts beliefs, and assumptions affect our behavior or perceptions of others whether in the workplace, on campus, or in the larger community. To advance a deeper understanding of diversity and inclusion, attendees will engage in several thought-provoking activities that will challenge thinking, understanding, society views and their own personal experiences. One main goal in this highly interactive session is to engage attendees experimentally and reflectively: leaving participants with a renewed focus to utilize acquired knowledge and skills in their work

Interest Sessions

9:30 AM – 10:20 AM

- Cash Management

Presenter: **David Bartlett**, Department of Education

Moderator: **Susan Kannenwischer**, Columbus College of Art & Design

The topics covered in this cash management session will include a variety of information from maintaining cash to reconciliation.

- NUDGE Theory

Presenter: **Matt Nettleton**, Inceptia; **Carrie Short**, Lorain County Community College

Moderator: **Carrie Short**, Lorain County Community College

“Nudge” is all the rage right now, with its proven success in increasing FAFSA completions, decreasing summer melt, and improving retention rates. But its effects aren’t just limited to sprawling national campaigns – you can make big changes with tiny nudges at your own campus!

If you’re curious as to what nudging is all about and how it could potentially work for you, join us for this session to explore the why, how, and when of nudge theory. A case study from Indiana University will demonstrate how a simple letter nudged students toward better borrowing habits. We’ll also discuss guidelines and ideas for utilizing nudge theory at your campus. Attendees will come away from this session with:

1. A practical understanding of nudge theory and its role in financial education programming
2. Tips and ideas from the Indiana University case study
3. A guide to creating nudge-based financial education initiatives

Friday, March 20, 2020 Continued...

Interest Sessions

9:30 AM – 10:20 AM

- **A.L.I.C.E (Active Shooter Presentation)**

Presenter: **Daniel Pignatelli**, Westerville City Police, **John Jeffries**, Westerville City Police

Moderator: **Todd Everett**, Mount Carmel College of Nursing

The Westerville Division of Police provides free training on civilian response to active shooter events. With active shooter incidents occurring in the nation and around the globe, the course is designed to inform, prepare, and empower people with law-enforcement endorsed options that increase situational awareness and personal safety.

Discussion will center on the evolution of mass shootings as a criminal behavior, including analysis and a lessons-learned approach through several case studies. Trained officers will explain active shooter trends and how to develop a plan of action based on research, statistics and best practices.

10:20 AM – 10:45 AM Hotel Check Out

10:45 AM – 2:00 PM Brunch

Federal Update

Recognition

Closing remarks