



**OHIO ASSOCIATION OF  
STUDENT FINANCIAL  
AID ADMINISTRATORS**

**CONFERENCE  
OCTOBER 24–26, 2018**

**POWER OF OUR PAST  
FORCE OF OUR FUTURE**

**50TH ANNIVERSARY**



# From the OASFAA President



Greetings, friends!

I'd like to be the first to welcome you to OASFAA's 2018-2019 Annual Conference, where we will celebrate the *Power of Our Past* and engage the *Force of Our Future* during this monumental 50<sup>th</sup> Anniversary celebration!

We are thrilled to welcome back so many of our Past Presidents and other former OASFAA leaders to help celebrate our history. I hope you can take time during the conference to meet some of these talented individuals and learn from their valuable experiences, both in the aid profession and within leadership roles they have held in OASFAA. They are here to not only celebrate OASFAA's past, but help ensure we are positioned to sustain 50 more years of success. The full list of OASFAA's

Past Presidents can be found on page 4 of this program.

The Conference Planning Committee has worked hard to bring you a wide range of learning opportunities, presented by many of our skilled OASFAA colleagues. Members of leadership from ODHE, NASFAA, and MASFAA will also provide training and perspective from their respective organizations and associations. Lastly, our Federal Student Aid Trainer will be here to make sure we're ready for the 2019-2020 FAFSA season, ensuring we understand the latest compliance issues and regulatory changes from D.C. that our institutions will face.

Wednesday night's President's Reception and Gala Celebration (*black tie optional*) begins with a cocktail hour from 5:45 to 6:30, followed by dinner and a special tribute from 6:30 to 8:00 in the upstairs Ballroom. After dinner, we'll cap off this fabulous night with music and a Casino Night. Come dressed in your glitziest glam for this once in a lifetime celebration! This will be a night you do not want to miss!

The training sessions continue throughout Thursday and Friday with many opportunities for learning and networking. Also during these two days, our 2018-2019 Chenelle Leadership Class participants will meet with some of our Past Presidents while we prepare them for leadership roles within the association and back on their campuses.

Finally, thank you to all those serving on the 2018-2019 OASFAA Executive Board - OASFAA is better because of YOU and the passion you show towards this great organization.

Cheers,

A handwritten signature in black ink, appearing to read 'Matthew R. Moore'. The signature is fluid and cursive, written over a white background.

Matthew R. Moore  
2018-2019 OASFAA President



## 2018-2019 Executive Committee Trustees

President—**Matthew Moore**, Sinclair Community College  
President-Elect—**Adam Dilulio**, Cuyahoga Community College  
Past-President—**Susan Kannenwischer**, Capital University  
Vice President for Conferences—**Carolyn McCluskey**, Baldwin Wallace University  
Vice President for Training—**Emily Haynam**, The Ohio State University  
Secretary—**Kirby Adams**, Sinclair Community College  
Treasurer—**Lindsay Walton**, The Ohio State University  
Treasurer-Elect—**Carrie Short**, University of Akron  
Northeast Regional Representative—**Megan Edwards**, University of Mount Union  
Northwest Regional Representative—**Phillip Birkey**, Ohio Northern University  
Southeast Regional Representative—**Sheila Nelson-Hensley**, Belmont College  
Southwest Regional Representative—**Bailey Bartels**, University of Cincinnati  
Associate Member Representative — **Jeff Johnston**, Sallie Mae

## 2018-2019 Executive Committee Chairs

50th Anniversary Task Force—**Ann Marie Gruber**, Lakeland Community College; **Cheryl Willard**, Baldwin Wallace University  
Associate Member Relations—**John Brown**, Capital University; **Jeff Johnston**, Sallie Mae  
Association Governance & Planning—**Betsy Johnson**, Bowling Green State University; **Faith Phillips**, Central Ohio Technical College & Ohio State Newark  
Communications—**Jesse McMillan**, Capital University; **Sarah Pavlack**, Sinclair Community College  
Conference Entertainment—**Greg Carlo**, cuLearn with Thrivent; **Michael Jones**, Citizens Bank  
Conference Program—**Andrea Morrow**, Owens Community College  
Conference Registration—**Mary Reshad**, Wright State University  
Conference Site—**Stephanie Goller**, University of Toledo; **Connie Fears**, University of Cincinnati  
Diversity—**James McDougal**, KEMBA Financial Credit Union; **Randy Ulses**, University of Cincinnati  
Finance—**Adam Dilulio**, Cuyahoga Community College  
Leadership—**Erica Henry**, University of Cincinnati; **Melanie Weaver**, Ohio Northern University  
Membership—**Debra Clark**, Central Ohio Technical College & Ohio State Newark  
Need Analysis—**Leigh Jackson**, University of Cincinnati; **A'Lisa Hatfield**, The Ohio State University  
New Member/Mentor—**Meghann Fraley**, University of Rio Grande; **Jennifer Toomey**, Case Western Reserve University  
Nominations—**Adam Dilulio**, Cuyahoga Community College  
Outreach—**Mary Cannon**, Hondros College; **Jeff Johnston**, Sallie Mae; **Cody McMillen**, University of Dayton; **MorraLee Keller**, National College Access Network; **Jesse McMillan**, Capital University  
Professional Development—**Renee' Lamp**, Cuyahoga Community College; **Laura Meek**, Denison University  
Regulatory—**Ashley Eder**, Adtalem Global Education; **Lauren Urban**, John Carroll University

## 2018-2019 Executive Committee Liaison

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

# Past Presidents

- 2017-18 **Susan Kannenwischer**, Capital University  
2016-17 **Faith Phillips**, Central Ohio Technical College & Ohio State Newark  
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 (Condeni)**, 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  
**Tamika Braswell**—Ohio Department of Higher Education

**John Brown**—Capital University  
**Lisa Burke**—University of Cincinnati  
**Mary Cannon**—Hondros College  
**Greg Carlo**—cuLearn with Thrivent  
**Judy Cunningham**—CollegeAdvantage  
**Adam Dilulio**—Cuyahoga Community College  
**Ashley Eder**—Adtalem Global Education  
**Connie Fears**—University of Cincinnati  
**Elina Fonseca**—University of Cincinnati  
**Meghann Fraley**—University of Rio Grande  
**Joe Fries**—Sallie Mae  
**Emily Goldman**—Hondros College  
**Stephanie Goller**—University of Toledo  
**Deb Goosman**—College Ave Student Loans  
**Ann Marie Gruber**—Lakeland Community College  
**Emily Haynam**—The Ohio State University  
**Erica Henry**—University of Cincinnati  
**Vena Hill**—Columbus State Community College  
**Leigh Jackson**—University of Cincinnati  
**Betsy Johnson**—Bowling Green State University  
**Jeff Johnston**—Sallie Mae  
**Michael Jones**—Citizens Bank

**Susan Kannenwischer**—Capital University  
**MorraLee Keller**—National College Access Network

**Paige Kiley**—Clark State Community College  
**Renee' Lamp**—Cuyahoga Community College  
**Debra Langdon**—Marion Technical College  
**Carolyn McCluskey**—Baldwin Wallace University  
**James McDougal**—KEMBA Financial Credit Union  
**Laura Meek**—Denison University  
**Matthew Moore**—Sinclair Community College  
**Andrea Morrow**—Owens Community College  
**Christina Napier**—Kent State University  
**Jared Nofziger**—Valor Christian College  
**Faith Phillips**—Central Ohio Technical College & Ohio State Newark  
**Mary Reshad**—Wright State University  
**Carrie Short**—University of Akron  
**Heidi Sisson**—Cognition Financial  
**Jennifer Toomey**—Case Western Reserve University  
**Lauren Urban**—John Carroll University  
**Melanie Weaver**—Ohio Northern University  
**Cheryl Willard**—Baldwin Wallace University

## 2018-2019 Leadership Class

The OASFAA Leadership Program began 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.

Welcome 2018-19 OASFAA Don Chenelle Leadership Class!

**Reba Bartrug**—Washington State Community College  
**Phil Birkey**—Ohio Northern University  
**Margaret Cornish**—Lorain County Community College  
**Megan Edwards**—University of Mount Union  
**Yolanda Hill**—Cuyahoga Community College  
**Diana Howey**—Terra State Community College

**Jesse McMillan**—Capital University  
**Armina Patton**—Oberlin College  
**Krystal Reynolds**—Ashland University  
**Caitlyn Schoffner**—Sinclair Community College  
**Maria-Theresia Silber**—Ohio Dominican University  
**Charles Williams**—Bryant & Stratton College



# Years of Service

## Congratulations

*2018 is not only a landmark year for OASFAA, but also for some colleagues!*

### 50 Years

Donald Chenelle

### 40 Years

Nancy Issa  
Venus Puliafico  
Michele Wade

### 35 Years

Ginny Biada  
Philip Bovenizer  
Diane Ray  
Nancy Sanford  
Anna Schofield

### 30 Years

Melissa Amspaugh  
Tanya Lundy

### 25 Years

Jacki Adkins  
Michael Jones  
Julie Leslie  
Matthew Nettleton  
Heidi Sisson

### 20 Years

Stacey Black  
Calvin Butler  
Andrea Caputo  
Ruth Ann Ford  
Joe Fries  
Charlotte Hardy  
Suzanne Harmon  
Veronica Haynes-Davidson  
Robin McHenry  
Tricia Pangonis  
Pamela Pustay  
Laura Stith  
Karen Tijanich  
Ralph Walker  
Beth Zachery

### 15 Years

Vickie Bell  
Jesse Brown  
Mary Cannon  
Kimberly Clevenger  
Brandi Everhart  
Amy Gooden  
Gloria Jenkins  
Jeff Johnston  
Tina Jones  
Trisha Kent-Swartz  
Tracy Mattern  
Chris McMullen  
Catherine Mix  
Arrick Moore  
Becky North  
Shannon Ogden Boyd  
Theresa Rabbits  
Christina Richey  
Samuel Selvage  
Peter Woodward

### 10 Years

Mary Baumann  
Lisa Burke  
Adam Dilulio  
Ashley Eder  
Lisa Gangwer  
Sarah Gensner  
Molly Hoffman  
Amy Kaple  
Matthew Kirksey  
Valerie Pratscher  
Bonnie Rampello  
Julia Rippke  
LaToya Stephens  
Cindy Surgener  
Lavonya Wilson  
Doris Young

### 5 Years

Krista Bachli  
Cathy Belfiore  
Rebecca Brown  
Adria Flannery  
Celestine Goodloe  
Michael Hampel  
Matthew Hargrave  
Emily Haynam

Beverly Heinisch  
Diana Irving  
Lisa Jones  
Paige Kiley  
Joey Kuhn  
Theresa Popelar  
Autumn Ransom  
Michelle Richardson

Andrea Siderits  
Maria-Theresia Silber  
Jeneen Stone  
Kathleen Thomas  
Mary Tontimonia  
Charles Williams

## Lifetime Members

Lifetime Membership to OASFAA is limited to those individuals who served the Ohio Association of Student Financial Aid Administrators, and the financial aid profession with distinction for a significant period of time. This honor is intended to recognize a member at the end of a career devoted to the administration of student financial aid. Lifetime members are non-voting members of the association. To be considered for Lifetime Membership, an individual must be nominated by a current member of the association.

The Association Governance and Planning Committee is responsible for gathering information on the nominee's contributions and presenting their findings to the Trustees. Lifetime Membership will be confirmed by a majority vote of the Trustees.

**Ginny Biada**—Baldwin Wallace University  
**Don Chenelle**—Case Western University  
**Rodney Harrison**—The Ohio State University  
**Ronald J. (Jack) Hinz**—University of Cincinnati  
**Alex Murdoch**—University of Cincinnati  
**James White**—Oberlin College

## Distinguished Service Award

The Distinguished Service Award was created in 1985. The award is reserved for an OASFAA member who has provided devoted and unselfish service in furthering the progress, aims and ideals of OASFAA, MASFAA and NASFAA supporting the entire financial aid community.

**2014**—Jamie Malone, Great Lakes Higher Education  
**2006**—Tally K. Hart, The Ohio State University  
**1985**—Marc L. Brenner, Ohio Diesel Technical Institute

## Regions

OAFSAA regions are determined by the telephone area code in which the institution is located.





# Awards & Recognition

## Support Professional Award

The Support Professional Award, given from 1990 through 2017, recognized individuals who were serving in the support/clerical profession reporting to an OASFAA member. The recipients exemplified a strong commitment to the students, their institutions for which they worked and the financial aid profession. OASFAA would like to thank each of these awardees for their dedication as well as those who continue to serve in this role today.

- |      |   |      |  |
|------|---|------|--|
| 2017 | <b>Melody Whitlock</b> —University of Cincinnati  | 1997 | <b>Laura Witt</b> —NE Ohio College of Medicine   |
| 2016 | <b>Lisa Jackson</b> —Kent State University  |      | <b>JoAnn Evans, Kathy Stripling, Carrie Lemle, Kevin Paskvan</b> - Owens Community College   |
| 2015 | <b>Renee Hales</b> —Oberlin College   |      | <b>Lola Hauss</b> —Capital University  |
| 2014 | <b>Christa McNichols</b> —Mount Vernon Nazarene University  |      | <b>Debbie Back, Linda Will, Marcia Mitchell, Anthony Boniella, Evelyn Harris, Patricia Rakestraw, Candace McGowan, Rodney Gross, Cheryl Griffin-Daugherty, Robin McLemore, Rutha Lacking</b> —Sinclair Community College |
| 2013 | <b>Dawn Langdon</b> —Stark State College  |      |  |
| 2012 | <b>Marion Carter</b> —The Ohio State University   |      |  |
| 2011 | <b>Christina Emerson</b> —Case Western Reserve University   |      |  |
| 2010 | <b>Debra Clark</b> —Central Ohio Technical College  |      |  |
| 2009 | <b>Jennifer Healey</b> —University of Dayton  |      |  |
| 2008 | <b>Kim Kuhajda</b> —Baldwin-Wallace College   |      |  |
| 2007 | <b>Jenny Rumpler and Pat Tobis</b> —Miami University  | 1996 | <b>Andrea Hines</b> —Oberlin College   |
| 2006 | <b>Tracy Febel</b> —Lakeland Community College  |      | <b>Barb Noonan and Kent McKenzie</b> - University of Toledo  |
| 2005 | <b>Ann Cano</b> —University of Dayton   |      | <b>Barbara Birk</b> —Capital University  |
| 2004 | <b>Janet Crawford, Lee Ann Timmerman, Sherry Benjamin, Kathy Sybert</b> —Ohio Northern University |      | <b>Kathi Richards</b> —Edison Community College  |
| 2003 | <b>Dottie Chapman</b> —Bluffton College   | 1995 | <b>Judy Cook</b> —University of Findlay  |
| 2002 | <b>Tenley Peterson</b> —University of Toledo  | 1994 | <b>Melissa Chandler</b> —Lakeland Community College  |
| 2001 | <b>Annie Johnson</b> —Ohio State University   | 1993 | <b>Carol Benedum, Meilani Cook, Marge Smith</b> —Stark Technical College   |
| 2000 | <b>Shannon Maag</b> —Lima Technical College   | 1992 | <b>Janet Crawford</b> —Ohio Northern University  |
| 1999 | <b>Darlene Burns</b> —Walsh University  |      | <b>Becky Heaton</b> —Mount Vernon Nazarene   |
| 1998 | <b>Stephanie Medley</b> —Belmont Technical College  | 1991 | <b>Sandy Miller</b> —Ohio University   |
|      | <b>Bea Pettaway</b> —Medical College of Ohio  | 1990 | <b>Ruth Murphy</b> —Marietta College   |
|      | <b>Sandy Vilkowski</b> —Miami University  |      |  |

# 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.

- 2017 **Angela Johnson**—Cuyahoga Community College
- 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

## Awards & Recognition

### Alex Murdoch Service Award

The Alex Murdoch Service Award was established in 1999 to honor Alex, Associate Director of Financial Aid at University of Cincinnati, when he retired that year. The honor, first announced at Winter Conference 1999 as a tribute to Alex, is awarded annually to a member of OASFAA who has given outstanding service to OASFAA and its members. The recipient's convictions and loyalty to OASFAA, have made it a better organization through their efforts and many contributions.

2018	<b>Carrie Short</b> , University of Akron	2009	<b>Ted Hallenbeck</b> , PNC Bank
2016	<b>Andrea Morrow</b> , Owens Community College	2008	<b>Suzanne Fahrner</b> , Bowling Green State University
2015	<b>Randy Ulises</b> , University of Cincinnati	2007	<b>Melony Ohalek</b> , Sallie Mae Graduate & Professional Programs
2014	<b>John Brown</b> , Great Lakes Educational Loan Service, Inc.	2006	<b>Joan Dornette</b> , Good Samaritan College of Nursing
2013	<b>Mary Lynn Perri</b> , Ursuline College	2005	<b>Barbara Hughes</b> , Baldwin-Wallace College
2012	<b>Angela Johnson</b> , Cuyahoga Community College	2004	<b>Doris I. Smith</b> , North Central State College
2011	<b>Mary Kay Freshour</b> , Otterbein University	2003	<b>Claudia Wenzel</b> , John Carroll University
2010	<b>Betsy Johnson</b> , Owens Community College	2002	<b>Cheryl Willard</b> , Baldwin-Wallace College
		2001	<b>Connie Williams</b> , University of Cincinnati
		2000	<b>Lawrence Matthews</b> , Bluffton College

## Awards & Recognition

### Alan M. Donley Chair in Need Analysis Recognition

The Alan M. Donley Chair in Need Analysis honors AI for his commitment and dedication to the philosophy of need analysis and to the need analysis committee over years. AI was the Director of Financial Aid at Hiram College beginning in 1966 and the OASFAA president for the 1972-73 academic year. The need analysis committee chair (or senior chair if it is a co-chair position) is recognized each fall conference as they continue the legacy of need analysis training for OASFAA.

2015	<b>Stacey Black</b> , Cuyahoga Community College
2014	<b>Erica Walker-Smith</b> , Baldwin Wallace University
2013	<b>Venus Puliafico</b> , Case Western Reserve University
2012	<b>Kevin Lamb</b> , Marietta College
2011	<b>Carolyn McCluskey</b> , Baldwin-Wallace College
2010	<b>Randy Green</b> , Wittenberg University
2009	<b>James Engler</b> , Franklin University
2008	<b>Greg Carlo</b> , Great Lakes Higher Education Guaranty Corporation
2007	<b>Pamela Hughes</b> , Ohio Northern University
2006	<b>Carmen Sears Edwards</b> , Citibank
2005	<b>Kim Nash-Yore</b> , Cuyahoga Community College



# Awards & Recognition

## MASFAA State Leadership Award

The MASFAA State Leadership Award is presented annually to recognize outstanding leadership of a member from each of the 9 states within MASFAA. The recipients, who must be current MASFAA members, must have made outstanding contributions to the financial aid profession at the state and regional levels over a sustained period of time., i.e. seven years or more. Leadership at the regional level is not the only criterion for this award, and the selection process will not be limited to current state elected leaders. The individuals selected for this award must: exhibit high integrity and character; have shown creative leadership; have inspired and encouraged others to participate actively in professional development activities; have sustained active involvement in professional organizations, and have supported the goals and objectives of MASFAA.

- |      |   |      |  |
|------|---|------|--|
| 2017 | <b>Erica Henry</b> , University of Cincinnati         | 2011 | <b>Ann Marie Gruber</b> , Lakeland Community College |
| 2016 | <b>Emily Haynam</b> , The Ohio State University       | 2010 | <b>Arman Habegger</b> , University of Findlay        |
| 2015 | <b>Alicia Frey</b> , Belmont Technical College        | 2009 | <b>Karen Kopp</b> , Cuyahoga Community College       |
| 2014 | <b>Angela K. Johnson</b> , Cuyahoga Community College | 2008 | <b>Cheryl Willard</b> , Baldwin-Wallace College      |
| 2013 | <b>Randy Ulses</b> , University of Cincinnati         | 2007 | <b>Michiale M Schneider</b> , Student Loan Xpress    |
| 2012 | <b>Val Kepner</b> , Oberlin College                   | 2006 | <b>Ginny Biada</b> , Xpress Loan Servicing           |

## 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

**50<sup>th</sup> Anniversary Entertainment Sponsor:** Campus Logic, Inc.

**Silver Level:** CommonBond

Great Lakes Higher Education Corporation

College Ave Student Loans

PNC Bank

## EXHIBITORS

Thrivent

College Advantage

KEMBA Financial Credit Union

Citizens Bank

Cognition Financial

Edfinancial Services

ELM Resources

Financial Aid TV

Inceptia

Kentucky Higher Education Assistance Authority

Sallie Mae

Student Connections

U-fi Student Loans

Wells Fargo

*Thank  
you*

# Conference Menu

## Wednesday Lunch

*Mixed Green Salad*  
*Panzanella Bread Salad with Balsamic Vinaigrette*  
*Roasted Garlic Hummus with Grilled Pita*  
*Beef and Chicken Satays & Quinoa with Tzatziki Sauce*  
*Whitefish with Eggplant Caponata & Crispy Chickpeas*  
*Vegetable Lasagna & Three Cheese Alfredo*  
*Lemon Roasted Fingerling Potatoes*  
*Sautéed Ratatouille*  
*Semolina Batard with Black Lava Salted Butter*  
*Gourmet Coffees & Teas, Iced Tea*

## Wednesday Dessert Break

*Baklava and Pistachio Biscotti*  
*Gourmet Coffees & Teas, Iced Tea*

## Wednesday Dinner

*Caesar Salad*  
*Green Salad*  
*Bang Bang Shrimp with Rice Noodles*  
*Pasta Primavera with Seasonal Vegetables*  
*Sliced New York Sirloin with Rosemary Accents*  
*Herb Roasted Potatoes*  
*Green Bean Almondine*  
*Mini Seasonal Cupcakes & 50th Anniversary Cake*  
*Gourmet Coffees & Teas, Iced Tea*

## Thursday Breakfast

*Seasonal Fruits*  
*Scrambled Eggs*  
*Roasted Breakfast Potatoes with Caramelized Onions*  
*Crispy Bacon or Golden Sausage*  
*Assorted Pastries & Bagels*  
*Fruit Jams, Cream Cheese and Butter Spreads*

## Thursday Lunch

*Caesar Salad*  
*Bowtie Spaghetti & Penne Pasta with Sauces*  
*Pulled Chicken or Shrimp with Bacon and Veggies*  
*Breadsticks*  
*Gourmet Coffees & Teas, Iced Tea*

## Thursday Dessert Break

*Freshly Baked Brownies, Blondies, and Fruit Bars*  
*Gourmet Coffees & Teas, Iced Tea*

## Friday Breakfast

*Granola & Cereal Bars*  
*Assorted Yogurts*  
*Gourmet Coffees & Teas*

## Friday Brunch

*Selection of Chilled Juices*  
*Seasonal Fruits*  
*Scrambled Eggs*  
*Roasted Breakfast Potatoes with Caramelized Onions*  
*French Toast with Syrup*  
*Crispy Bacon or Golden Sausage*



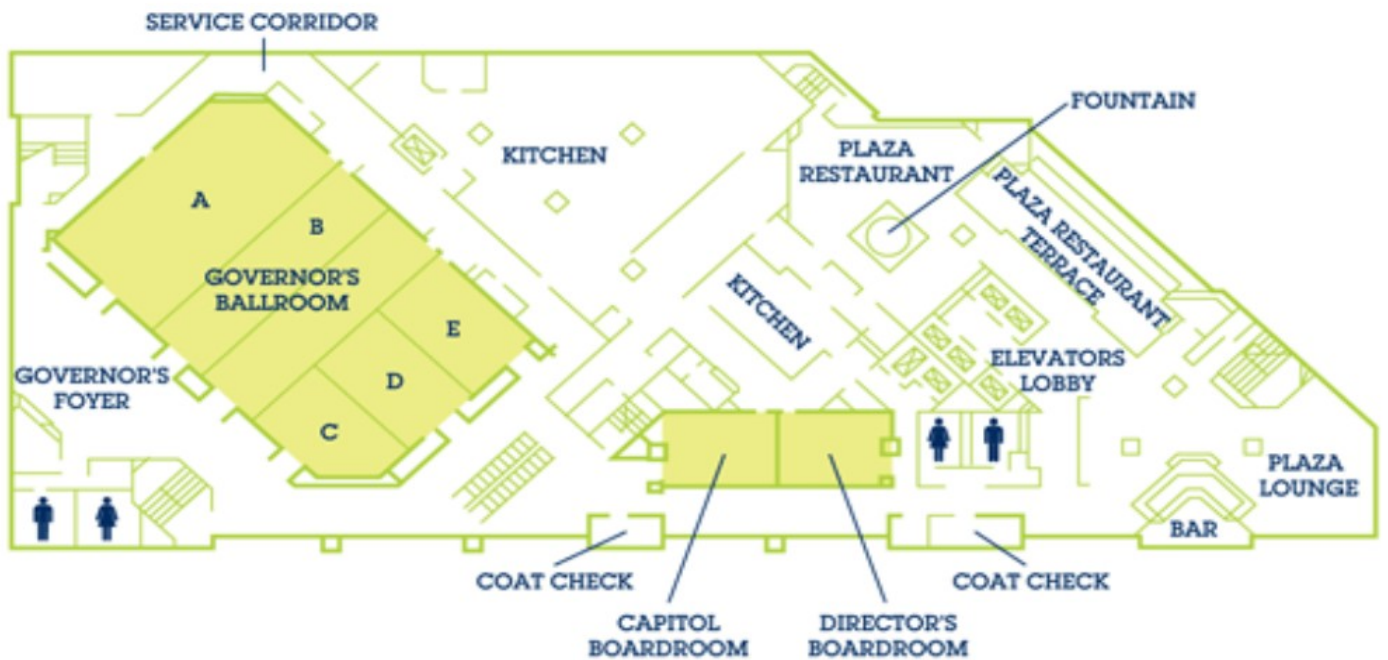


# Hotel Map

## FIRST FLOOR



## SECOND FLOOR



# Wednesday, October 24, 2018

## **8:30am—11:45am**      **NASFAA Credential Workshop** **Satisfactory Academic Progress (SAP)—Legislative Room**

Presenter: **Betsy Johnson**, Bowling Green State University  
Moderator: **Emily Haynam**, The Ohio State University

In this session, we will be following the NASFAA University Credentialed Training materials. Students will be introduced to SAP, learn the basics of evaluating SAP, learn the ins and outs of SAP appeals, probation, and academic plans, and other important SAP policy elements.

## **10:00—11:45am**      **Registration & Exhibits Open**

## **12:00—1:15pm**      **Lunch—Governor’s Ballroom**

Presidents’ Welcome and Special Recognitions

## **1:15—5:00pm**      **Registration Open/Exhibits Open**

## **1:30—2:20pm**      **Interest Sessions**

## **New Member Welcome—Senate Room** ★

Presenter: **Meghann Fraley**, University of Rio Grande; **Jennifer Toomey**, Case Western Reserve University  
Moderator: **Meghann Fraley**, University of Rio Grande; **Jennifer Toomey**, Case Western Reserve University

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 organization. This is a great opportunity to meet other new members, learn about committees in OASFAA, and ask any questions you may have as a first-time attendee!

## **Understanding our Diverse Student Populations—Judicial Room** ★

Presenter: **Kimberly Creasap**, Denison University  
Moderator: **Judy Cunningham**, Ohio Tuition Trust Authority

Creating a safe and welcoming environment in which all can pursue academic goal. Discussion of gender identity, personal pronouns, gender neutral pronouns.

## **Resolving Overawards—Legislative Room** ●

Presenter: **Leigh Jackson**, University of Cincinnati  
Moderator: **Leigh Jackson**, University of Cincinnati

Learn the basics of resolving overawards and overpayments. Topics covered will include federal requirements, common causes, and best practices for creating your institutional policies.

## **Enrollment Management: Past, Present, Future—House Room** ▲

Presenter: **Angela Johnson**, Cuyahoga Community College; **Susan Kannenwischer**, Capital University  
Moderator: **Laura Meek**, Denison University

Do you have a seat at the Enrollment Management table at your institution? If not, you should! Come learn how EM has developed through the years, how Financial Aid fits in the model and how we as financial aid professionals strategically support institutional goals.



# Wednesday, October 24, 2018

**Past Presidents' Session (*invitation only*)—Congressional Room**

**Leadership Class (*invitation only*)—Executive B & C**

Presenter: **Erica Henry**, University of Cincinnati; **Melanie Weaver**, Ohio Northern University

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

**2:20—2:45pm Dessert Break—Legislative Foyer**

**2:45—3:35pm Interest Sessions**

**NASFAA Credential Workshop: Verification (Part I)—Senate Room**

Presenter: **Nathan Zwyer**, The Ohio State University

Moderator: **Emily Haynam**, The Ohio State University

In this session, we will be following the NASFAA University Credentialed Training materials. Students will be introduced to verification, changing applicant data, disbursements, timeframes, policies and procedures.

**Reviewing ADA Requirements and Your Website—Judicial Room ●**

Presenter: **Randy Ulses**, University of Cincinnati

Moderator: **Randy Ulses**, University of Cincinnati

While we often consider our physical spaces and compliance with the Americans with Disabilities Act (ADA), have we done enough to make our websites more accessible to a broader group of students and parents? Even with limited resources, you can assess your website and make modifications to become more accessible.

**Professional Judgement: Is your decision being influenced by your biases?—Legislative Room ●**

Presenter: **Olga Byxbee**, American Public University System

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

Do you complete Professional Judgement decisions at your institution? Is your decision being influenced by your bias? This session will discuss biases and hidden biases that may be sneaking their way into your PJ process!

**Past Presidents' Session (*invitation only*)—Congressional Room**

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Future



# Wednesday, October 24, 2018

## Direct Loans and the Process—House Room ▲

Presenter: **Ashley Eder**, Adtalem Global Education; **Jennifer Toomey**, Case Western Reserve University  
Moderator: **Ashley Eder**, Adtalem Global Education; **Jennifer Toomey**, Case Western Reserve University

This session will dive deeper into the world of Federal Direct Loans through the use of COD (Common Origination & Disbursement), CPS (Central Processing System) and NSLDS (National Student Loan Data System). We will discuss some of the common issues that arise with Direct Loans and the systems needed to process them.

## VA Education Benefits—Executive B & C Room ★

Presenter: **Harry Dulick**, U.S. Department of Veteran Affairs  
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.

**3:35pm—3:50pm**      **Beverage Break**

**3:50—4:40pm**      **Interest Sessions**

## NASFAA Credential: Verification (Part II)—Senate Room

Presenter: **Nathan Zwyer**, The Ohio State University  
Moderator: **Emily Haynam**, The Ohio State University

In this session, we will be following the NASFAA University Credentialed Training materials. Students will be introduced to verification, changing applicant data, disbursements, timeframes, policies and procedures.

## Customer Service Gen Z—Judicial Room ★

Presenter: **Joe Fries**, Sallie Mae; **Erica Henry**, University of Cincinnati  
Moderator: **Joe Fries**, Sallie Mae

Please join the University of Cincinnati and Sallie Mae as we analyze the impact of Gen Z as they rapidly become the largest generation on our planet today and on your campus. We will explore their tremendous influence over norms, expectations and behavior, and highlight the financial, buying habits and expectations of GenZ and how to engage them. We will also provide insight into how your college and university peers are managing GenZ expectations on their campus.

## Transient Students and the Consortium Agreement—Legislative Room ●

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

Consortiums are often thought of as one of the “Great Unknowns” in the financial aid world. This session intends to break down some of the uncertainty surrounding consortium agreements, transient students, and the process involved. We will start with basic definitions and regulations, and work into examples and best practices.



# Wednesday, October 24, 2018

## Shaping the Future with Financial Education—House Room ★

Presenter: **Jennifer Schroeder**, Iowa State University

Moderator: **Deb Langdon**, Marion Technical College

The State of Iowa is working to shape their student's financial futures by requiring financial education training for all new freshman. Through this session, learn how three universities in Iowa have implemented this requirement and the outcomes they are seeing.

## Standard Terms Are the Way of the Past—Can They Be the Wave of the Future?—Congressional Room ●

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

Moderator: **Lauren Urban**, John Carroll University

Have you been approached by academic leaders at your institution about the development of a new program with a non-traditional format, while in the past your programs have been offered only in standard terms? In this session we will explore how many apparently non-traditional academic calendar formats can continue to be considered standard-term for Title IV purposes, to minimize the need to modify your aid processes. Specifically attendees will learn how certain flexibilities in standard-term programs, such as modules, intersessions and competency-based models, can make accommodating academic change easier.

## Lessons Learned as a Financial Aid Director—Executive B & C Room ▲

Presenter: **Randy Green**, Wittenberg University; **Meghann Fraley**, Rio Grande University; **Melanie Weaver**, Ohio Northern University

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

Whether you are a seasoned veteran, newly hired, or an aspiring director, join us for a session about lessons learned as a financial aid director. In this Q & A session, panelists will share their experiences regarding challenges in aid office management, leadership lessons, skills acquired, and some favorite stories.

**5:45—6:30pm**

**President's Reception—Governor's Ballroom**

**6:30—7:30pm**

**Dinner—Governor's Ballroom**

**"The OASFAA Notebook"**

Presenter: **Ginny Biada**

**8:00—11:00pm**

**Entertainment—Congressional**

*details on page 30*





# Thursday, October 25, 2018

7:30—11:30am

Registration & Exhibits Open

7:30—8:30am

Breakfast—Governor’s Ballroom

8:00—8:30am

OASFAA Business Meeting—Governor’s Ballroom

8:30—9:30am

General Session—Governor’s Ballroom

**State Update:** David J. Cummins, Ohio Department of Higher Education

**MASFAA Update:** Nicholas Prewett, The University of Missouri

9:40—10:25am

Interest Session

**Leadership Class (*invitation only*)—Executive B & C Room**

Presenter: **Erica Henry**, University of Cincinnati; **Melanie Weaver**, Ohio Northern University

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

9:40—10:25am

Business Solutions Interest Sessions

**The New School Mindset—Thrivent Student Resources—Senate Room**

Presenter: **Greg Carlo**, Thrivent Student Resources

Moderator: **Greg Carlo**, Thrivent Student Resources

Our team’s purpose is to help students and families see money for what it really is. Not a goal. Not just the things it can buy. A tool, for chasing your dreams within your means, so you can live a life of contentment, confidence and generosity. We offer online, do-it-yourself resources for navigating the journey before, during and after college. And for those who prefer to work one-on-one, our Thrivent Scholars Network has college planning experts ready to personally guide you through all aspects of college financial readiness.

**Student Success Solutions—Legislative Room**

Presenter: **Becky Davis**, Great Lakes Higher Education Corporation

Moderator: **Becky Davis**, Great Lakes Higher Education Corporation

The path to a college degree and a better future with long-term financial wellness isn’t an easy one for many students. They face complex barriers getting through college and many take on unmanageable debt along the way. Increasingly, schools are being held accountable for student success. Great Lakes mission has always been student success and we have created a suite of products to help you help your students succeed.

**One Student Loan, Twice the Impact—Congressional Room**

Presenter: **Jane Lemke**, CommonBond

Moderator: **Jane Lemke**, CommonBond

Join us to learn about CommonBond’s commitment to the future of students through our low-cost products and our partnership with Pencils of Promise to provide schools, teachers, and technology to thousands of students in the developing world. The presenter will also share counseling tools which you can use to advise your graduates so they can determine if refinancing is right for them.





# Thursday, October 25, 2018

## Mobile Financial Aid: What Your Students Really, REALLY Want—Judicial Room

Presenter: **Daniel Gonzales**, CampusLogic

Moderator: **Daniel Gonzales**, CampusLogic

Students today are used to mobile, online communications—they aren't used to waiting for information. Too often, complicated, manual, generic financial aid processes create barriers to student success. Don't believe us? Believe the 730 students we surveyed nation-wide. Hear about the improvements they want to see made to the FinAid process. Meet the platform that delivers what students want: an easy, mobile, personalized experience. Hear about the dramatic impact CampusLogic has had on the student experience at other institutions.

**10:25—10:45am Beverage Break—Legislative Foyer**

**10:45—11:35am Interest Sessions**

## Why Financial Aid, Aspiring Leaders, and Leading in the 21<sup>st</sup> Century—Senate Room ▲

Presenter: **Nick Prewett**, The University of Missouri

Moderator: **Susan Kannenwischer**, Capital University

This session is an overview of the financial aid office. It examines the tools, skills, and desire necessary to be a successful financial aid director. Information regarding legislation & regulation, effective communication, technology, enrollment management, and adaptation to an ever changing world of financial aid. If you want to become a true champion and leader, this session may be for you.

## Tax Transcripts, Non-Filer Letters, & DRT Tips and Resources—Legislative Room ★

Presenter: **Renee' Lamp**, Cuyahoga Community College; **Kirby Adams**, Sinclair Community College; **Jennifer Toomey**, Case Western Reserve University

Moderator: **Jared Nofziger**, Valor Christian College

Panel discussion about how multiple schools assist students in ordering their Non-Filer letters, Tax Return Transcripts, Wage Statements, and navigating the Data Retrieval Tool through the FAFSA. We will also discuss how to read a tax transcript versus a tax return and provide cheat sheets for attendees to take back to their offices.

## The Vital Partnership Between the Financial Aid Office and Retention—House Room ▲

Presenter: **Dave Deibel**, Educational Credit Management Corporation

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

The issue of student retention and persistence continues to grow. Persistence and retention rate is greatly affected by the level and quality of student interactions with peers and high touch offices on campus. This session will focus on the collaborative impact the FAO can have on both.

## Keeping the Dream Alive—Judicial Room ★

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

Moderator: **Judy Cunningham**, College Advantage

Diversity issues can at times be a difficult topic, and looking for solutions to best assist our students can often present a challenge for administrators. This interactive session, set in the style of a game show, is designed to enlighten the attendees to peer beyond the surface of the student's financial need. In the game show, participants will be faced with some real life circumstances and must choose what is behind one of the unknown curtains. The players, along with their teams, will strategize for solutions to overcome the pitfalls and keep their educational dream alive.



# Thursday, October 25, 2018

## Federal Tools & Resources: There's an App for That—Congressional Room ★

Presenter: **Fred Stennis**, Federal Student Aid

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

Federal Student Aid (FSA) recently launched a new app for completing the FAFSA and more. The FAFSA website has been redesigned. FSA has created tools and resources to help you in your work. Come learn about tools that will help you be a force of the future in our work.

### 11:35am—12:00pm Interest Sessions

#### Northeast Region—Senate Room

Moderator: **Megan Edwards**, The University of Mount Union

#### Northwest Region—Legislative Room

Moderator: **Philip Birkey**, Ohio Northern University

#### Southeast Region—House Room

Moderator: **Sheila Nelson-Hensley**, Belmont College

#### Southwest Region—Judicial Room

Moderator: **Bailey Bartels**, University of Cincinnati

### Associate Member Meeting—Congressional Room

Moderator: **John Brown**, Capitol University; **Jeff Johnston**, Sallie Mae

### 12:00—1:50pm Lunch—Governor's Ballroom

#### Awards Ceremony

**NASFAA Federal Update:** Karen McCarthy

### 1:50—4:00pm Registration Open/Exhibits Open

### 1:50—2:05pm Visit with Exhibitors/Move to Interests Sessions

### 2:05—2:55pm Interest Sessions

### Need Analysis – Leigh Jackson—Senate Room

Presenter: **Need Analysis Committee**

Moderator: **Need Analysis Committee**

Need Analysis #1: Federal Methodology and Independent Case Study.

## Loans 101 and Direct Loan Trivia —Congressional Room ★

Presenter: **Ashley Eder**, Adtalem Global Education; **Jennifer Toomey**, Case Western Reserve University

Moderator: **Heidi Sisson**, Cognition Financial

Come test your knowledge and learn a few things about the Federal Direct Loan Program. This engaging session will highlight the basics on the Federal Student Loan Programs through an interactive presentation.



# Thursday, October 25, 2018

## Mental Health of Higher Education Staff—House Room ●

Presenter: **Kevin Berg**, Cuyahoga Community College; **David Nardecchia**, Cuyahoga Community College  
Moderator: **Renee' Lamp**, 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.

## Legs, Regs, and You—Judicial Room ★

Presenter: **Karen McCarthy**, NASFAA  
Moderator: **Betsy Johnson**, Bowling Green State University

Wondering about the different between legislation and regulation? How are each made, governed, and enforced? How do they impact the day-to-day work you do as a financial aid administrator? This session will provide a “101” on development and implementation of legislation and regulation, and how it pertains to you and your role.

## Trauma—Informed Student, Parent, and College Engagement (Part I)—Legislative Room

Presenter: **Kimberly Brazwell**, Kimistry LLC  
Moderator: **Vena Hill**, Columbus State Community College

How much could our past experiences be shaping our present and future relationships? Through the examination of SAMHSA'S (Substance Abuse and Mental Health Services Administration) eight dimensions of wellness, the ACE's study research, identity & cultural competence, attendees will practice steps of richer engagement in highly interactive discussions.

## Leadership Class (*invitation only*)—Executive B & C Room

Presenter: **Erica Henry**, University of Cincinnati; **Melanie Weaver**, Ohio Northern University  
Moderator: **Melanie Weaver**, Ohio Northern University



# Thursday, October 25, 2018

2:55—3:10pm

**Beverage Break—Legislative Foyer**

3:10—4:00pm

**Interest Sessions**

## **Need Analysis—Senate Room**

Presenter: **Need Analysis Committee**

Moderator: **Need Analysis Committee**

Need Analysis #2: Dependent Case Study.

## **Verification: Days of Future Past—Congressional Room**

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

Moderator: **Lauren Urban**, John Carroll University

In this session we will review current requirements for verification, for 2018-2019 and 2019-2020 (spoiler alert – they are the same!). Time will also be left for discussion of prospects for future requirements.



## **Trauma—Informed Student, Parent, and College Engagement (Part II)—Legislative Room**

Presenter: **Kimberly Brazwell**, Kimistry LLC

Moderator: **Vena Hill**, Columbus State Community College

How much could our past experiences be shaping our present and future relationships? Through the examination of SAMHSA'S (Substance Abuse and Mental Health Services Administration) eight dimensions of wellness, the ACE's study research, identity & cultural competence, attendees will practice steps of richer engagement in highly interactive discussions.

## **How to Detect and Deter Financial Aid Fraud—House Room**

Presenter: **Thomas D. Utz, Jr.**, U.S. Department of Education, Office of Inspector General; **John Woolley**, U.S. Department of Education, Office of Inspector General

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

Officials from the U.S. Department of Education, Office of Inspector General will present on the role of the OIG's office, FSA and OIG Coordination, examples of Title IV Fraud Schemes, and how financial aid professionals can help prevent and report suspected fraud.

## **Leadership Class (*invitation only*)—Executive B & C**

Presenter: **Erica Henry**, University of Cincinnati; **Melanie Weaver**, Ohio Northern University

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

4:10—5:00pm

**Interest Sessions**

## **Need Analysis—Senate Room**

Presenter: **Need Analysis Committee**

Moderator: **Need Analysis Committee**

Need Analysis #3: Professional Judgement Case Study.

# Thursday, October 25, 2018

## Trends in Higher Education—Legislative Room ▲

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

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

Trends in Student Aid and Trends in College Pricing are annual reports by the CollegeBoard that provide the latest data on trends over time in student aid, tuition, and other expenses associated with attending college. Using the most current trend data published in October of 2018, this presentation will highlight key trends that will help you understand both national and Ohio specific areas.



## Hitting Refresh on Career Advancement and Job Searches—Judicial Room ●

Presenter: **Hank Malin**, Denison University; **Laura Meek**, Denison University

Moderator: **Renee' Lamp**, Cuyahoga Community College

Do your job search methods and resume need a refresh? Do you desire to move ahead in your career in Financial Aid? Do you need a new primer in job-hunting skills? Let us help with practical strategies in moving up the ladder, conducting a job search and remodeling your resume.

## Consumer Information Panel—House Room ▲

Presenter: **Faith Phillips**, Central Ohio Technical College & Ohio State Newark; **Todd Everett**, Mount Carmel College of Nursing; **John Brown**, Capital University

Moderator: **Faith Phillips**, Central Ohio Technical College & Ohio State Newark

How confident are you that your institution is compliant with the many consumer information requirements? Consumer Information is required to be on your website, in publications and shared with current and prospective students. Together we will discuss some of the key components of consumer information and who is responsible to share and notify.

## Leadership Class (*invitation only*)—Executive B & C

Presenter: **Erica Henry**, University of Cincinnati; **Melanie Weaver**, Ohio Northern University

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

**5:00—6:00pm**      **OASFAA Appreciation Reception—Congressional Room**

**6:00pm**              **Dinner On Your Own** (*restaurant suggestions at registration desk*)

*Bon Appétit*



# Friday, October 26, 2018

**7:30—10:00am**                      **Registration Open**

**7:30—8:30am**                      **Breakfast—Legislative Foyer**

**8:30—9:20am**                      **Interest Sessions**

## **Looking Back and Moving Forward: A Review of Pell Recalculations—Congressional Room**

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

Moderator: **Ashley Eder**, Adtalem Global Education

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.

## **All of Us Use It, Some of Us Hate It: Beyond Basics Excel—House Room ●**

Presenter: **Brittany Wilson**, Hondros College of Nursing

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

We all have to use Excel! This session will take you beyond just basics and give you tools you can use immediately.

## **HEI Training System—Legislative Room ●**

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.

## **Work/Life Balance—Lessons learned with years of experience and How to Move Forward! —Judicial Room ▲**

Presenter: **Denise Eder**, Thrivent Student Resources

Moderator: **Greg Carlo**, Thrivent Student Resources

What does “Having It All Mean”? 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—whose kids have survived! We will discuss real life situations and experiences and help participants with balancing work, family life and everything else in between.

**9:30—10:20am**                      **Interest Sessions**

## **Communication Channel Effectiveness: Channel Specific Messaging for GenZ—Senate Room ★**

Presenter: **Scott Oris**, ELM Resources

Moderator: **Heidi Sisson**, Cognition Financial

Communicating with students today sure is different than in the past. Consistent and concise communication is critical when it comes to reaching students with important financial information. Many of us are still reacting to and/or preparing for GenZ, who are already on our campuses. Come find out what changes should already have been made to best interact with this group and how we may be able to prepare for the group coming up behind them.





# Friday, October 26, 2018

## Building a Structure Around a Student on SAP Restriction—Judicial Room ●

Presenter: **Marcus Jackson**, Columbus State Community College

Moderator: **Jennifer Toomey**, Case Western Reserve University

Financial Aid often has access to information that impedes student success. Though we have the information, we rarely are in the situation to use that information to help students succeed in obtaining their degree. Our presenter will discuss how their institution works collaboratively to foster student success when they are on SAP restriction.

## Foolproof Organization Tips For Your Financial Aid Office—Legislative Room ●

Presenter: **Daniel Gonzales**, CampusLogic

Moderator: **John Brown**, Capital University

Are the things taking up the majority of your time in the financial aid office the most important for reaching your institution's goals? Learn foolproof tips to help you organize around student needs, your institution's strategic goals, and optimal efficiency.

In this session, we'll discuss:

- Organizing basics key to financial aid
- How to audit & refine your current organization strategy
- Using data to analyze and track success

Join our session and learn what your Financial Aid Office's biggest hurdle is—and no, it's not time—and how to solve for it.

## FICO Research: Financial Literacy Efforts that Have Had Proven Results—House Room ▲

Presenter: **Jeff Johnston**, Sallie Mae

Moderator: **Carrie Short**, University of Akron

Increasing financial knowledge and equipping individuals with tools to make better financial decisions is on the forefront of financial education. Learn how a recent multi-year field experiment demonstrated that viewing a FICO® score influences and promotes positive financial behaviors. Attendees will also get a review on how to talk to students about building a positive credit record and FICO® score.

## Leadership Class (*invitation only*)—Executive B & C Room

Presenter: **Erica Henry**, University of Cincinnati; **Melanie Weaver**, Ohio Northern University

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

**10:20—10:45am**

**Break/Hotel Check Out—Governor's Ballroom**

**10:45am—1:00pm**

**Brunch—Governor's Ballroom**

**11:15am—12:30pm**

**General Session —Governor's Ballroom**

**Federal Update:** Zack Goodwin, U.S. Department of Education

**12:30pm—1:00pm**

**Recognition Ceremony**

**President Closing Remarks**



## Keynote Speakers

### David J. Cummins

David Cummins is Interim Vice Chancellor of Finance and Data Management at the Ohio Department of Higher Education. In this capacity he oversees policy development for state financial support for public higher education and supervises the Higher



Education Information System staff responsible for data collection and analysis. Mr. Cummins has served as CFO/ Treasurer at three Ohio campuses – the University of Akron, Lorain County Community College and North Central State College. He also has experience with the State of Ohio Office of Budget and Management (OBM) where he had served as Senior Budget Analyst of the Education Section and later for Policy and Planning.

Mr. Cummins earned his Master of Arts in Economics from The Ohio State University and received a Bachelor of Arts from Cleveland 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

### Karen McCarthy

Karen 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.

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### Nick Prewett

Nick Prewett is the Executive Director of Financial Aid at The University of Missouri. Over the past 16 years he has been active in state, regional, and national professional associations as a presenter, trainer, board member, and committee chair. He currently serves as the president Midwest Association of Financial Aid Administrator’s (MASFAA) and previously served on the NASFAA board as a representative at large. He enjoys discussing the finer points of financial aid policy and advocating on behalf of students to provide access and affordability in higher education. He recently learned the proper way to tie his shoes and it made all the difference.



## Entertainment

Wednesday evening we will honor and celebrate 50 years of OASFAA! To complement our vibrant program, the 50<sup>th</sup> Anniversary Task Force and Conference Committee has planned an amazing opportunity for us to celebrate 50 years of OASFAA. Please join us for our 50<sup>th</sup> Anniversary Celebration Casino Night sponsored by Campus Logic! This is the perfect opportunity to get dressed up and mingle with old and new friends and colleagues. Regardless if you're a gambler or not, come out for a fun-filled evening that

will have many surprises in store. So come dressed to impress and dance the night away to 50 amazing years of OASFAA! The night will have something for everyone!



## Charity

The Driven Foundation is a 501c3 non profit organization founded in 2008 by former NFL and Ohio State University Football teammates Roy Hall and Antonio Smith. Driven's infrastructure is built on three core principles; perseverance (never give up), resilience (get back up), assistance (help others up). Driven works with more than 600 volunteers annually through various outreach events, and programs throughout Ohio. Nearly a decade in, Driven helps to solve community problems, cutting through red tape and uses it's platform for a purpose to assist in solving various community challenges.

The Driven Foundation works with various youth and community programs to help address basic day-to-day needs of families in the community. If you'd like to understand more, please visit the Driven Foundation's website and learn about how you may get involved to help make a difference. <http://staydriven.org/>

**DRIVEN**  
FOUNDATION



# CATCH THE CBUS

# #Catch the CBUS

COTA's CBUS® is the city's **free** Downtown Circulator, traveling from the Brewery District, through Downtown to the Short North, and back again. CBUS runs every 10-15 minutes, 7 days a week! Check our operating hours for specific details.

- # HOTELS**
- 1 Comfort Inn & Suites
  - 2 Courtyard
  - 3 Crowne Plaza
  - 4 Doubletree Suites
  - 5 Drury Inn & Suites
  - 6 Hampton Inn & Suites
  - 7 Hilton
  - 8 Holiday Inn
  - 9 Hyatt Regency
  - 10 Red Roof PLUS+
  - 11 Renaissance Hotel
  - 12 Residence Inn
  - 13 Sheraton
  - 14 Le Méridien, The Joseph
  - 15 The Lofts
  - 16 The Westin
  - 17 Hotel LeVeque

## Operating Hours:

- |                 |                 |
|-----------------|-----------------|
| Monday—Thursday | 7a.m.—9p.m.     |
| Friday          | 7a.m.—12a.m.    |
| Saturday        | 9a.m.—12a.m.    |
| Sunday          | 10:30a.m.—6p.m. |

## # HOTELS

- 1 Comfort Inn & Suites
- 2 Courtyard
- 3 Crowne Plaza
- 4 Doubletree Suites
- 5 Drury Inn & Suites
- 6 Hampton Inn & Suites
- 7 Hilton
- 8 Holiday Inn
- 9 Hyatt Regency
- 10 Red Roof PLUS+
- 11 Renaissance Hotel
- 12 Residence Inn
- 13 Sheraton
- 14 The Joseph
- 15 The Lofts
- 16 The Westin

## Frequency

	Daytime	Evening After 7pm
Monday to Thursday 7am-9pm	 10 Minutes	 15 Minutes
Friday 7am-midnight	 10 Minutes	 15 Minutes
Saturday 9am-midnight	 15 Minutes	
Sunday 10:30am-6pm	 15 Minutes	

\*Service operates 7 days a week except for major holidays

MAP KEY: ● Circulator Stop ● Point of Interest





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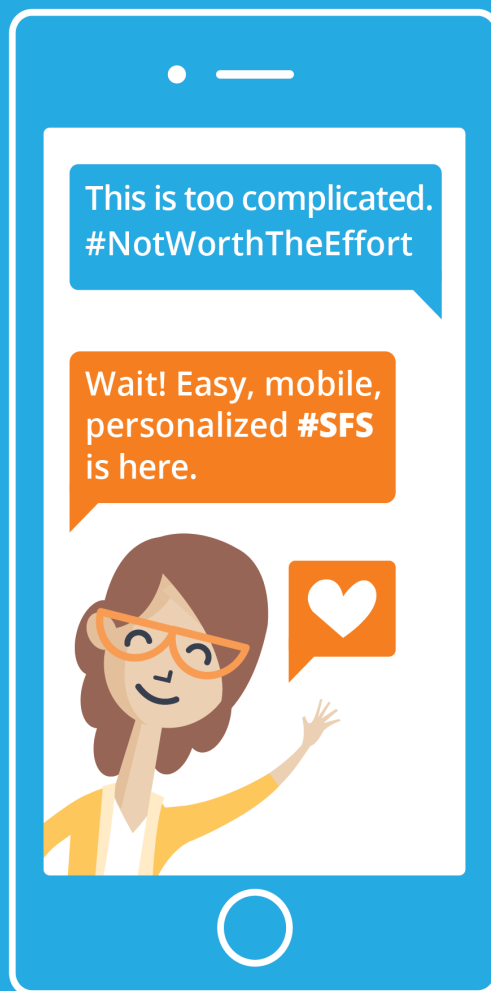


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## OASFAA Fun Facts

- ◆ In 1988, OASFAA started a hotline to answer financial aid questions and fielded 954 calls that year
- ◆ Membership dues in 1971 were \$5
- ◆ In the early days, hospitality hours were called “Attitude Adjustment Hours”
- ◆ First official logo was created in 1975
- ◆ The “Golden Snow Tire Award” was given each year to the person who traveled the most miles in the winter months doing financial aid nights
- ◆ In 1990, OASFAA won the NASFAA State Award for “The Lender Fact Book” they developed
- ◆ OASFAA houses their archives at Bowling Green State University







**FSA Conference**

November 27—30, 2018  
Atlanta, GA

**OASFAA Director's Day**

March 8, 2019  
New Albany, OH

**NASFAA Conference**

June 24—27, 2019  
Orlando, FL

**MASFAA Conference**

October 6—9, 2019  
Chicago, IL

**OASFAA Conference**

TBD for 2019

*Check the OASFAA calendar at [www.oasfaa.org](http://www.oasfaa.org) for additional training opportunities.*

**The benefits of being a member of OASFAA are invaluable, but will be magnified by getting involved.** Not only does volunteering provide you the opportunity to make connections with others in the association and make lifelong friendships, but it makes you a better financial aid professional. Volunteering for OASFAA allows you to give back to our profession and adds depth to your resume. To volunteer, send an email to [OASFAA@oasfaa.org](mailto:OASFAA@oasfaa.org).



**Committees**

College Goal Sunday

Communications

Conference Planning

Diversity

Leadership

Membership

Need Analysis

Outreach

Professional Development













**February:** South Carolina police shoot and kill three at South Carolina State College after a civil-rights protest at a segregated bowling alley

**April 3:** *Planet of the Apes* premieres

**April 4:** Martin Luther King Jr. assassinated in Memphis, Tennessee

**Apr 11:** US President Lyndon B. Johnson signs 1968 Civil Rights Act

**May:** Activists take over five buildings at Columbia U. in the largest protest of its kind, with 700 arrested — sparking a culture of student unrest

**June 5:** Robert F. Kennedy assassinated in Los Angeles

**August:** Students and other protesters battle the police at the Democratic National Convention, in Chicago

**October 16:** U.S. athletes take a stand at the Summer Olympics

**November:** Yale announces it will admit women. Princeton follows within months

**November 5:** Nixon wins the White House

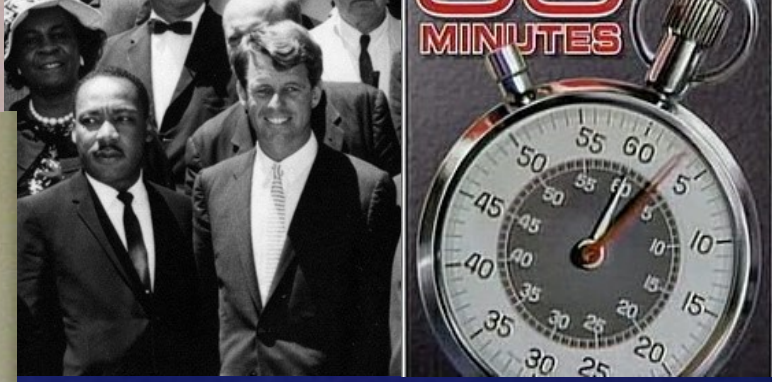
**November 12:** US Supreme Court: *Epperson v. Arkansas*, court declares unconstitutional Arkansas law banning teaching evolution in public schools

**December 24:** Apollo 8 is the first manned spacecraft to orbit the moon

Other news in 1968...

- ◆ The Beatles released their *White Album* and their movie, *Yellow Submarine*, in November
- ◆ A gallon of gas cost 34 cents
- ◆ Congress Denies Student Rioters Federal School Aid
- ◆ Average Cost of new house \$14,950.00; Average Income per year \$7,850.00; Average Monthly Rent \$130.00; Average Cost of a new car \$2,822.00
- ◆ Movie Ticket \$1.50
- ◆ Full-time tuition and fees at a public college was \$295
- ◆ The Federal Hourly Minimum Wage was \$1.60 an hour
- ◆ The first Big Mac goes on sale in McDonalds costing 49 cents
- ◆ The CBS television news magazine program "60 Minutes" shown for the first time
- ◆ "Hair" opens on Broadway
- ◆ Dr. Christian Barnard performs the first successful heart transplant
- ◆ The US Patent for Lava Lamps was permitted in 1968
- ◆ The Detroit Tigers won the World Series
- ◆ The Green Bay Packers won Superbowl II
- ◆ The Boston Celtics were NBA Champions
- ◆ The Ohio State University were NCAA Football Champions







*cheers to 50 years*

