

## 2011 SWASFAA Conference Program

### Wednesday, November 16

- 8:30 a.m. – 4:00 p.m.    **Registration Open**  
*Location:* Sequoyah Foyer North
- 11:00 a.m.                **Exhibit Hall Open** (closed during General Sessions)  
*Location:* Sequoyah V
- 1:00 p.m. – 2:30 p.m.    **Opening General Session**  
*Location:* Sequoyah I and II  
*Opening Remarks:* Laura Coponiti, SWASFAA President, Assistant Director of Financial Aid, University of Science & Arts of Oklahoma  
*Welcome:* Susan Harris, Senior Vice President of Education and the Workforce, Tulsa Metro Chamber of Commerce  
*Presentation of Colors:* Cherokee Nation Color Guard  
*National Anthem:* Sheila McGill, Financial Aid Director, Langston University
- NASFAA Update:* Pamela Fowler, Executive Director, University of Michigan; NASFAA Chair  
*Keynote Speaker:* Tim Woods, University of Central Oklahoma  
*Moderator:* Kelli Kelnar, Outreach Specialist, Oklahoma College Assistance Program
- 2:30 p.m. – 3:00 p.m.    **Refreshment Break**
- 3:00 p.m. – 4:00 p.m.    **Interest Sessions**

#### **Direct Loan Panel of Four Servicers**

*Location:* Sequoyah IV

*Presenters:* Robb Cummings, Senior Account Executive, Sallie Mae; Ron Hancock, Regional Director, Nelnet; Dan Weigle, Manager – School Support, FedLoan Servicing (PHEAA); Mike Mutziger, Vice President – Marketing and Sales, Great Lakes Educational Loan Services, Inc.

*Moderator:* Denise Sullivan, Account Manager, Discover Student Loans

This panel session will provide attendees with the newest information in the federal loan servicing environment. An overall presentation will include updates on recent program developments and future initiatives. The servicers will also give a brief update on tools and information that will be helpful for schools and borrowers. The session will conclude with a question and answer period.

#### **What's In a CDR?**

*Location:* Deer I

*Presenter:* Jacqueline Carroll, Financial Education Consultant, American Student Assistance

*Moderator:* Gabe Mendiola, Assistant Director of Financial Aid/IT Services, University of Texas at San Antonio

This session will help the attendee understand how the Cohort Default Rate (CDR) is calculated, the difference between the two-year and three-year calculation, how to appeal a CDR, and how to achieve the desired CDR.

### **Using NASFAA Tools to Assess Your Financial Aid Operations**

*Location:* Sequoyah VI

*Presenter:* Debra La Grone, Training Officer, NASFAA

*Moderator:* Sara Elliott, Financial Aid Assistant Director, Central New Mexico Community College

In this session we will discuss different strategies for using NASFAA's financial aid management tools to evaluate and improve your school's administration of Title IV and other student aid programs. You will learn how to use the Policies and Procedures Tools, Program Eligibility Checklist, and Using Federal Tax Returns in Need Analysis. The presenter will demonstrate how two NASFAA assessment tools, the Standards of Excellence Review Program and the Self-Evaluation Guide, can help you evaluate and improve your school's administration of Title IV and other student aid programs. The session will also highlight best practices and practical ways these user-friendly tools can assist you to enhance daily aid office operations, collaborate with others on campus, and stay in compliance with federal regulations.

### **Risks and Rewards of Transparency: Ethical and Policy Consideration in Implementing a Net Price Calculator**

*Location:* Deer II

*Presenter:* Cindy Bailey, Director of Net Price Calculator Sales and Outreach, The College Board

*Moderator:* Dustin Davidson, Financial Aid Coordinator, Moore Norman Technology Center

Participate in a frank discussion of factors institutions should consider in meeting the regulatory requirement to provide a net price calculator. What are the ethical issues and policy considerations to be addressed? What approach is consistent with your mission and philosophy? What risks may emerge for institutions in providing net price estimates and for families trying to interpret the results? What could be the rewards and benefits of providing this information?

4:00 p.m. – 4:15 p.m.

### **Break**

*Location:* Sequoyah V

4:15 p.m. – 5:15 p.m.

### **Interest Sessions**

#### **Administrative Capability: A Campus-Wide Compliance Requirement!**

*Location:* Sequoyah VI

*Presenter:* Debra La Grone, Training Specialist, NASFAA

*Moderator:* Mary Sue Rix, Director of Financial Aid, Centenary College of Louisiana

This session will take a look at facilitating campus-wide participation in administrative capability compliance. Is your financial aid office adequately staffed? Is your campus in compliance with the requirements for the separation of functions aspect of administrative capability? How is information shared within the institution? NASFAA staff will review and address the importance of understanding compliance issues related to administrative capability throughout the campus community.

### **Managing Your Institution's Default Rate**

*Location:* Deer I

*Presenter:* Paige Hendricks, Regional Director West/Southwest Region, Edfinancial Services

*Moderator:* Mendy Schmerer, Assistant Director, University of Oklahoma Health Sciences Center

This session will discuss the conversion from the two-year to three-year Cohort Default Rate (CDR). It will also explore CDR trends, risk factors, and action plan options to help you manage your institution's default rate.

### **Banner Session**

*Location:* Deer II

*Presenter:* Lee Carrillo, Financial Aid Director, Central New Mexico Community College

*Moderator:* Ronnie Kroepfl, Financial Aid Advisor, University of Arkansas-Little Rock

This round-table discussion is for Banner users of all levels of experience. Whether you are new to Banner or are a seasoned expert, this is the place you can come to exchange ideas and information with other financial aid administrators who use the same student information system.

### **Satisfactory Academic Progress**

*Location:* Sequoyah IV

*Presenter:* Joyce Fox, University of Texas at San Antonio

*Moderator:* Shannon Guillory, Associate Director of Financial Aid, McNeese State University

How has your Satisfactory Academic Progress policy changed since July 1? In this session you'll learn how to properly assess SAP, how to review your institution's SAP policy to ensure compliance and the roles that Financial Aid Warning, Financial Aid Probation, appeals, pace of progression, etc. play in the new way of monitoring SAP.

5:15 p.m.

**Dinner/Evening on Your Own**

**Thursday, November 17**

8:00 a.m. – 10:30 a.m. **Registration Open**

*Location:* Sequoyah Foyer North

8:00 a.m. **Exhibit Hall Opens** (closed during General Sessions)  
*Location:* Sequoyah V

7:30 a.m. – 8:30 a.m. **Continental Breakfast**  
*Location:* Sequoyah II and III

8:30 a.m. – 9:30 a.m. **General Session: Verification Changes**  
*Location:* Sequoyah II and III  
*Presenter:* Trevor Summers, Training Officer, U.S. Department of Education  
*Moderator:* Taina Savoit, Director of Financial Aid, McNeese State University

Come learn what's old and what's new with our favorite subject! We'll discuss the new regulations and processes your school must implement for 2012-2013.

9:45 a.m. – 10:45 a.m. **Interest Sessions**

**Legs, Regs, and You: A Primer on the Legislative and Regulatory Process**

*Location:* Sequoyah IV

*Presenter:* Justin Draeger, NASFAA President

*Moderator:* Cathleen Patella, Director of Financial Aid, Wells College

Understanding the interplay between legislation, regulation, and informal guidance will help you advocate more effectively. Join NASFAA President Justin Draeger to discuss the basic structure of regulation and legislation and examine real life examples of how you can have an effect on the processes that affect how you do your job.

**Return to Title IV – Credit Hour Calculation**

*Location:* Deer I and II

*Presenter:* Mandy Sponholtz, Regional Training Executive, USA Funds

*Moderator:* Becky Garrett, Assistant Director, University of Central Oklahoma

A Return of Title IV funds calculation determines the amount of aid a student earned after completely withdrawing from all classes and the resulting federal funds that must be returned by the school or the student. Learn the various components of the Return of Title IV funds calculation and how to apply them through a hands-on case study.

**Exploring the Issues Surrounding Online Programs**

*Location:* Sequoyah VI

*Presenter:* Pam Fowler, Exec. Director, University of Michigan; NASFAA Chair

*Moderator:* Bronwyn Sneed, Director of Financial Aid, Southern Arkansas University

Once you discover online programs on your campus, what do you do next? We will discuss the basic details an aid officer must know and things he/she must do before awarding and disbursing aid to your students.

## **UCanGo2: Your Go-To For the College Connection**

*Location:* Sequoyah I

*Presenters:* Kelli Kelnar, Outreach Specialist, Oklahoma College Assistance Program (OCAP); and Nancy Moats, Financial Aid Director, University of Science and Arts of Oklahoma

*Moderator:* Lisa Hopper, Financial Aid Director, National Park Community College

Learn about free college planning resources for high school students, middle school students, parents and counselors courtesy of UCanGo2. UCanGo2 offers an informative web site and materials to help students plan, prepare and pay for college. Also learn about helpful federal resources and NASFAA materials to assist you with financial aid events. Come see what we're all about!

10:45 a.m. – 11:00 a.m. **Refreshment Break**

*Location:* Sequoyah V

11:00 a.m. – 12:00 p.m. **Interest Sessions**

### **Consumer Information and Disclosures: Make Sure Your School Is In Compliance**

*Location:* Sequoyah I

*Presenter:* Paul Mittelhammer, NSLP

*Moderator:* Frankie Adair, Financial Aid Administrator, Tulsa Technology Center

The diverse consumer information requirements can sometimes seem overwhelming. It is imperative that schools comply with *all* requirements. This often means gathering data from other departments across the campus. Learn the basic types of consumer information that schools must provide to both potential and enrolled students. Get the details about each category of information required; financial assistance; academic programs, policies, facilities, and services; code of conduct; loan counseling; graduation and completion rates; and school security and crime statistics.

### **Financial Literacy**

*Location:* Deer I and II

*Presenter:* Sigmund Morel, Financial Literacy and Development Supervisor, Louisiana Office of Student Financial Assistance

*Moderator:* Kelly Hicks, Assistant Director of Financial Aid, Rogers State University

This session teaches basic principles of credit, banking, money management, credit cards, identity theft, budgeting, debt and/or student loans. It provides tools used to understand and wisely utilize your finances in a way that will empower you to reach your dreams.

### **Direct Loan Reconciliation and Closeout**

*Location:* Sequoyah IV

*Presenter:* Barbara Davis, Management Analyst, Internal Controls Division, U.S. Department of Education

*Moderator:* Mary Teel, Assistant Director, Texas A&M University

“Money don’t get everything, that’s true. But what it don’t get, I can’t use... Now give me mooooooney...” (Barrett Strong, 1959). Maybe money doesn’t get you everything, but being able to reconcile your Direct Loan cash and disbursements at your school will get you a clean Program Year closeout, and that’s something everyone can use!

### **How to Research Questions**

*Location:* Sequoyah VI

*Presenter:* Debra La Grone, Training Officer, NASFAA

*Moderator:* Denise Welch, Director of Financial Aid, Panola College

How do you find answers to questions about the Title IV programs? As a financial aid administrator, you are constantly fielding questions from students, their families, staff, other departments, and senior administration. Although many questions can be satisfied with a simple answer, some are more complex and require research. This session will identify the various resources available and will show you how to research regulatory resources.

### **12:15 p.m. – 2:00 p.m. Lunch and General Session:**

*Location:* Sequoyah II and III

*NASFAA Presentation of Regional Leadership Award:* Pamela Fowler, NASFAA Chair

*SWASFAA Service Awards:* Laura Coponiti, SWASFAA President

*SWASFAA Exhibitor Recognition:* Lou Murray, Regional Director, Nelnet

*SWASFAA Retiree Recognition:* Laura Coponiti, SWASFAA President

*SWASFAA Business Meeting:* Laura Coponiti, SWASFAA President

*Passing the Gavel:* Laura Coponiti, 2011 President, to Lisa Blazer, 2012 President

*Guest Speaker:* Justin Draeger, NASFAA President

### **2:15 p.m. – 3:15 p.m. Interest Sessions**

#### **Using NSLDS to Determine Aggregate Loan Amounts**

*Location:* Sequoyah IV

*Presenter:* Trevor Summers, Training Officer, U.S. Department of Education

*Moderator:* Lee Carrillo, Financial Aid Director, Central New Mexico Community College

In this session, we will go over the basics of NSLDS and what it can do for you. We’ll then dig deeper into aggregate calculations and how to determine loan eligibility in those complex consolidation scenarios.

#### **Program Integrity Rules and You**

*Location:* Sequoyah VI

*Presenter:* Lisa Blazer, Assistant Vice President, University of Texas at San Antonio

*Moderator:* David Barron, Executive Director of Enrollment Management, Rogers State University

This session will provide an overview of some of the new program integrity rules that affect us in our financial aid offices, including R2T4, SAP, Repeated

Coursework, Gainful Employment, Incentive Compensation, State Authorization and the Credit Hour Definition. Come prepared to brainstorm and discuss ways we are implementing the new requirements on our campuses and to find out why these rules are so important to the integrity of federal programs.

### **Role of the Ombudsman in Customer Service**

*Location:* Deer I and II

*Presenter:* Melissa Johnson and Todd Farrington, Ombudsmen, Great Lakes Guaranty Corporation

*Moderator:* Nancy Moats, Director, University of Science and Arts of Oklahoma

In this session we will discuss the role of a Student Loan Ombudsman, common issues that are raised, and how we work with the Student Loan Ombudsman Caucus and other organizations to identify and address issues and trends that impact the student borrowers' experiences.

### **Clock Hour Round-Table Discussion**

*Location:* Sequoyah I

*Facilitator:* Pam Cole, Financial Aid Specialist, Oklahoma Department of Career and Technology Education

Come prepared to discuss financial aid issues that are related to clock-hour schools with your colleagues. If you have questions about how to determine when a student has successfully completed a payment period or how other schools are handling the new Gainful Employment regulations, this is a place to share ideas and exchange information with others who have faced many of the same challenges.

3:15 p.m. – 3:30 p.m. **Beverage Break**

*Location:* Sequoyah V

3:30 p.m. **Exhibit Breakdown**

3:30 p.m. – 4:45 p.m. **Interest Sessions**

### **NASFAA's Standards of Excellence Programs: 10+ Years of Peer Reviews**

*Location:* Sequoyah IV

*Presenter:* Pam Fowler, Exec. Director, University of Michigan; NASFAA Chair

*Moderator:* John Jefferson, Director, Southern Arkansas University Tech

What is a NASFAA Peer Review? What areas are covered? Why should I have a program review? What types of compliance errors does a peer review uncover? All these questions and more will be answered in this session.

### **Ins and Outs of Student Loan Repayment**

*Location:* Sequoyah I

*Presenter:* David Garza, Senior Policy and Legislative Liaison, TG

*Moderator:* Scott DeBoard, Financial Aid Counselor, University of Central Oklahoma

While students receive information during loan counseling, they often have questions about how loan repayment works. This session is for those with default counseling experience and describes the repayment options available to student borrowers as they prepare to enter the workforce. Topics include: taking inventory of your student loans; understanding the available repayment plans and the advantages of each; reviewing the details of consolidation; deferment, forbearance, forgiveness, and discharge options; and choices for resolving a defaulted loan.

### **Navigating COD**

*Location:* Deer I and II

*Presenter:* Barbara Davis, Management Analyst, Internal Controls Division, U.S. Department of Education

*Moderator:* Angela Anaya, Financial Aid Director, Southwest Acupuncture College

“So you want to be a Rock ‘n’ Roll star? Then listen now to what I say. Just get an electric guitar; then take some time and learn how to play...” (Byrds, 1968) Be the Rock ‘n’ Roll star on your campus when it comes to COD! Learn to hit all the right notes when looking for the data you need and make working in COD as easy as humming your favorite Beatles tune!

### **Gainful Employment**

*Location:* Sequoyah VI

*Presenter:* Jeff Baker, Federal Student Aid, U.S. Department of Education

*Moderator:* Andrew Hammontree, Financial Aid Director, Francis Tuttle Technology Center

Come join us for a discussion on the new regulations pertaining to Gainful Employment. Jeff Baker will explain the latest requirements on applying for new programs, disclosures, and reporting for Gainful Employment.

6:30 p.m. – 8:00 p.m. **Evening Dinner and Silent Auction**  
*Location:* Sky Room (18<sup>th</sup> Floor)

## **Friday, November 18**

8:00 a.m. – 8:45 a.m. **Breakfast**  
*Location:* Sequoyah I and II

8:45 a.m. – 10:30 a.m. **Federal Update**  
*Location:* Sequoyah I and II  
*Presenter:* Jeff Baker, Federal Student Aid, U.S. Department of Education  
*Moderator:* Lisa Blazer, Assistant VP of Financial Aid & Enrollment Services, University of Texas at San Antonio

## **SWASFAA 2011 Exhibitors**

The following organizations are exhibitors at this year's SWASFAA annual conference. Please take time to visit them in the foyer during the conference. SWASFAA sincerely appreciates their support of and participation in our conference.

### **American Student Assistance**

**Charter One Bank**

**The College Board**

**Discover Student Loans**

**Edfinancial Services**

**Elm Resources**

**FedLoan Servicing (PHEAA)**

**Great Lakes Education Loan Servicing, Inc.**

**iGrad**

**Mohela**

**Nelnet**

**NSLP**

**Oklahoma College Assistance Program**

**Sallie Mae**

**SimpleTuition**

**TG**

**USA Funds**