

# Welcome to CASFAA 2012!



## Dear Colleagues:

After months of planning, I truly can't believe that this moment is upon us. When we embarked on this 2012 Executive Council year, my mission as President was to provide our schools and partners with a revitalized association...one that pays homage to our history, yet looks to the future to ensure that we will always be able to support your professional development and training needs by being a viable and relevant organization.

This year we are welcoming a record number of attendees that well surpasses conference attendance in recent years. In addition, we are excited to see our vendor partners re-engage, and are pleased to be able to welcome more vendor participation this year than in recent years. I am hopeful that this is because we have worked hard to provide opportunities at this conference and throughout the year that support the increased attendance and participation.

For those of you attending, I want to extend my most sincere thanks for trusting CASFAA to support your critical training and professional development needs. What your trust in us deserves is our utmost effort to continually evolve in order to be the professional association that you need in times of having to do more with less of your school resources.

I cannot thank each and every one of you enough for supporting CASFAA. I am confident that our Conference Committee has produced an amazing conference this year...one that will truly make you feel part of the CASFAA family. Please make sure that you take advantage of all of the opportunities for training and networking that this conference affords. And, last but not least, if we haven't met, please introduce yourself. You, are what makes this Conference and Association what it is!

## Welcome Home!

Deb Barker-Garcia  
Corinthian Colleges, Inc., Inc.  
2012 CASFAA President





## Welcome to the 2012 CASFAA Conference

On behalf of the organization, I'd like to welcome you home, to the ***Premier Training and Networking Event for Financial Aid Administrators in the Golden State!***

What a pleasure it is to close the calendar year with a conference that not only provides a wide range of learning opportunities, for aid administrators from the newcomer to the seasoned veteran, but also to be able to network and celebrate with colleagues from across the state.

A sincere thank you to all of our attendees this year: I firmly believe that any successful training event or conference depends greatly on the participation and enthusiasm of those in attendance.

My deepest appreciation also to CASFAA's 2012 Executive Council and the 2012 Conference Committee, for your leadership, dedication and teamwork and to all of our volunteers as well, whose hard work, time and effort are so needed and vital to the organization and its events.

If you have never considered becoming more involved in CASFAA or volunteering, I urge you to do so in 2013. Run for an office, step forward to volunteer on a committee, offer to present or moderate a conference session or simply put in an hour or two at the registration desk next year if you can. As Konstantin Stanislavski said, there are no small parts, only small actors – anything you can do to help CASFAA keep moving forward is welcome, appreciated and necessary!

***Cheers!***

Lynne Garcia  
Corinthian Colleges, Inc., Inc.  
2012 Conference Chair

# Vision Statement

## CASFAA will:

- Serve as a resource for all financial aid professionals in California;
- Provide members with opportunities to become actively involved in the activities of the Association;
- Prepare members to assume leadership roles in the student aid profession, the Association, and other financial aid associations;
- Serve as an authority in the State on student aid issues and be consulted regularly by Federal and State policy makers, the media, and other educational partners; and
- Be proactive with regard to positions on State and national financial aid policy issues, and in protecting the interests and rights of California students for educational access and choice.

## MISSION STATEMENT

*To provide  
training and professional  
development opportunities to  
the financial aid community and  
to advocate on behalf  
of the financial aid profession  
for student educational  
access and choice.*

## Statement of Ideals

Whereas, in a world of rapidly changing technology and global competitive higher education is an absolute national investment in our collective future, and;

Whereas, CASFAA believes that every effort must be made to provide students access to the educational opportunities best suited to individual needs, and;

Whereas, CASFAA has a continuing commitment to ensuring that all students be provided an opportunity to pursue a quality postsecondary education, and;

Whereas, CASFAA believes that student financial aid programs enable deserving students to realize educational goals and to become productive members of society;

Therefore Be It Resolved, that the 1989 CASFAA Executive Council establishes this Student Financial Aid Statement of Ideals:

- Educational funding at all levels must be a national priority of equal importance to the defense of our freedom.
- All students who can benefit have a right to a quality academic or career related postsecondary education regardless of their financial circumstances.
- All students, regardless of choice of eligible school, must have the opportunity to apply for all types of student aid (scholarships, grants, employment, and loans) in order



that they may minimize financial barriers to the achievement of their educational goals.

- The financial aid application process must seek to encourage, not intimidate, needy students from participation.
- The need analysis system should be simplified to the extent that students can clearly understand how need is determined.

However, the system must be able to differentiate among applicants in order that limited resources may be equitably directed.

- To the extent possible, employment opportunities for students should attempt to complement the student's classroom or career interests and goals.
- Additional "in-school" services related to retention, remedial and/or developmental education and financial aid must be provided to those students whose needs require additional support.
- In today's diverse society, students must be exposed to positive role models both in the classroom and in professional and administrative areas.

## Statement of Good Practices

### *The financial aid administrator...*

- Shall at all times uphold the high ethical standards expected of those committed to this profession by encouraging honesty and accuracy and by serving as a positive role model to all.
- Shall make every effort to promote and develop effective programs of student financial aid at all levels and to promote awareness of its national priority.
- Shall make every effort to provide students access to the educational opportunity of his/her choice by meeting his/her demonstrated financial need, to the extent funding is available.
- Shall inform the student of all conditions under which an award is granted at the time the offer is made stressing the student's responsibilities in accepting the award.
- Shall counsel the student who accepts a loan as to the seriousness of this obligation as well as all elements required by law.
- Shall respect the confidentiality of all aspects of student records and shall ensure that all policies and procedures protect the student's right to privacy.
- Shall make effort to ensure additional student services related to retention, remedial and/or developmental education are provided to students who need additional support.
- Shall exercise adequate controls to make every effort to ensure compliance with all applicable state and federal laws and regulations for the benefit of the student.
- Shall oppose the use of aid administrators to accomplish disciplinary objectives.

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## Important Conference Information

The 2012 CASFAA Conference Committee extends its sincere appreciation to the volunteers, schools, agencies and organizations who have contributed to this year's Conference. The information included in this program is intended to help you make the most of your Conference experience.

### Registration Center

Registration materials may be picked up at the CASFAA Center Registration Desk in the foyer outside the Marquis Ballroom.

### Badges

Your name badge serves as your official conference "ticket" and **MUST BE WORN AT ALL FUNCTIONS**. Name Badges will be issued at the CASFAA Registration Desk. Badges are **NOT** transferrable (Including Exhibitor Badges). Your CASFAA conference registration includes entrance to all sessions and events. CASFAA staff and volunteers will be checking for badges and tickets for meal functions. If you misplace your name tag, please come to the Conference Registration Desk for a replacement.

### The Registration Desk will be open:

**Saturday, December 8, 2012**

7:00 AM – 5:00 PM

**Sunday, December 9, 2012**

7:00 AM – 5:00 PM

**Monday, December 10, 2012**

7:00 AM – Noon

### Exhibit Hall hours:

**Sunday, December 9, 2012**

3:00 PM – 6:00 PM

**Monday, December 10, 2012**

10:00 AM – 11:30 PM

2:00 PM – 5:00 PM

***All General Sessions, breakfasts, lunch and dinner will be in the Marquis Ballroom.***

***Our Exhibitors and all breaks will be in Grand Ballrooms E and F.***

### Ribbons

Special ribbons will identify the CASFAA Executive Council, conference committee members, and Lifetime members, past presidents, first-time conference attendees, volunteers as well as presenters and exhibitors.

## Electronic Services

Please silence all cell phones or other electronic devices during all sessions. The recording of any session is strictly prohibited and requires advance permission by CASFAA and the session presenter.

## Wayfinding

A hotel floor plan has been included for your convenience (*inside back cover*) and signs have been placed in strategic areas and outside the meeting rooms to assist you with finding your sessions. If you require additional assistance, please check with the CASFAA Registration Desk.

## Conference Attire

The dress for the Conference is business casual.

## Non-Smoking Policy

The CASFAA 2011 Conference is designated as a non-smoking event. Outside areas are provided where people can go out to smoke.

## Information Disclaimer

We have tried to make sure everything in the Conference program is accurate at the time of printing. As you may understand, last minute changes must sometimes occur. Should changes be necessary, announcements will be made at the general sessions.

## Liability Disclaimer

The California Association of Student Financial Administrators (CASFAA) is a voluntary association and is not responsible for the personal health, safety and welfare of its members when attending sponsored events.

CASFAA is not responsible for the use by any party of the information disseminated or provided by CASFAA in any manner whatsoever.

## Non-Discrimination Policy

The California Association of Student Financial Administrators (CASFAA) views its membership to be an important asset to the community and to the State of California.

In respecting the individuality of each member, we are committed to maintaining an inclusive environment at Association functions. It is important to CASFAA that its members participate in activities free from all forms of discrimination and harassment on the basis of race, religion, creed, color, age, sex, sexual orientation, national origin, ancestry, marital status, medical condition or disability.



# Executive Council

## 2012

<b>President</b>	<b>Deb Barker-Garcia</b>	Corinthian Colleges, Inc.
<b>Past President</b>	<b>Lynn Fox</b>	University of the Pacific
<b>President-Elect</b>	<b>Melissa M. Moser</b>	Orange Coast College
<b>Vice President/Federal Issues</b>	<b>Noelia Gonzalez</b>	CSU Stanislaus
<b>Vice President/State Issues</b>	<b>Craig Yamamoto</b>	San Diego State University
<b>Secretary</b>	<b>Daniel Reed</b>	Point Loma Nazarene University
<b>Treasurer</b>	<b>Sunshine Garcia</b>	CSU Channel Islands
<b>Treasurer-Elect</b>	<b>Dewayne Barnes</b>	Stanford University, School of Law
<b>CCC Segmental Representative</b>	<b>Angelina Arzate</b>	Palomar College
<b>CSU Segmental Representative</b>	<b>Marcia Starcher</b>	CSU Pomona
<b>UC Segmental Representative</b>	<b>Lindsey Crowell</b>	UC Los Angeles
<b>Independent Segmental Rep</b>	<b>Robin Thompson</b>	Occidental College
<b>Proprietary Segmental Rep</b>	<b>Laura Bouche</b>	Institute of Technology
<b>Grad/Prof Member-at-Large</b>	<b>Lily Marquez</b>	Samuel Merritt University
<b>Ethnic Diversity Member-at-Large</b>	<b>Denise Peña</b>	Dominican University

## 2013

<b>President</b>	<b>Melissa M. Moser</b>	Orange Coast College
<b>Past President</b>	<b>Deb Barker-Garcia</b>	Corinthian Colleges, Inc.
<b>President-Elect</b>	<b>Lynne Garcia</b>	Corinthian Colleges, Inc.
<b>Vice President/Federal Issues</b>	<b>Daniel Reed</b>	Point Loma Nazarene University
<b>Secretary</b>	<b>Robin DeCarangelo</b>	Solano Community College
<b>Treasurer</b>	<b>Wayne Mahoney</b>	Southwestern Law School
<b>Treasurer-Elect</b>	<b>Lindsey Crowell</b>	Pepperdine University, Seaver College
<b>CCC Segmental Representative</b>	<b>Brian Heineman</b>	Copper Mountain
<b>CSU Segmental Representative</b>	<b>Louise Jones</b>	CSU San Bernardino
<b>UC Segmental Representative</b>	<b>Daniel Roddick</b>	UC Berkeley
<b>Independent Segmental Rep</b>	<b>Daniel Wait</b>	Loyola Marymount
<b>Proprietary Segmental Rep</b>	<b>Thomas Le</b>	Wyotech
<b>Grad/Prof Member-at-Large</b>	<b>Natasha Kobrinsky</b>	Pepperdine University, Graziado School of Business & Management
<b>Ethnic Diversity Member-at-Large</b>	<b>Denise Peña</b>	Dominican University of California



# Past Presidents

1972	Robert Huff	Stanford University
1973	Gene Miller	Pasadena City College
1974	Donald Ryan	San Jose State University
1975	John Danielson (deceased)	University of California, Berkeley
1976	George Tenopir	Whittier College
1977	Marvin Hensley	University of California, Davis
1978	Lawrence Braxton	Loyola Marymount University
1979	Ralph Alvarez	California State University, Sacramento
1980	Ralph Alvarez	California State University, Sacramento
1981	Rachel Ness	San Francisco City College
1982	Kathleen Little	University of California, Santa Cruz
1983	Paul Phillips	University of the Pacific
1984	Kate Wilson	San Diego State University
1985	Michael Alexander	University of California, Santa Barbara
1986	Sal Alcala	Solano County Community College
1987	Michael Halloran	University of Southern California
1988	Jeffrey Baker	San Francisco State University
1989	William Haggard (deceased)	Fashion Institute of Design and Merchandising
1990	Minerva Gonzalez-Ozuna	Palomar Community College
1991	Gloria Kapp	California State University, Long Beach
1992	Jack Memmott	University of California, Davis
1993	Georgette DeVeres	Claremont McKenna College
1994	Heidi Granger	United Education and Software
1995	Maureen McRae Levy	Glendale Community College
1996	Steve Herndon	California State University, Bakersfield
1997	Ursula Kaiser	Stanford University Graduate School of Business
1998	Addalou Davis	UOP, McGeorge School of Law
1999	Toni DuBois	Long Beach City College
2000	Vu Tran	California State University, Los Angeles
2001	Connie Barton	Lassen Community College
2002	Linda Bisesi	University of California, Hastings College of the Law
2003	Ena Hull	San Joaquin Delta College
2004	Wayne Mahoney	Southwestern Law School
2005	Joanne Brennan	Career Colleges of America
2006	Louise Jones	UC Riverside
2007	Mindy Bergeron	John F. Kennedy University
2008	Louise Jones	California State University, San Bernardino
2009	Barbara Bickett	DeVry University
2010	Yvonne Gutierrez-Sandoval	Pitzer College
2011	Lynn Fox	University of the Pacific
2012	Deb Barker-Garcia	Corinthian Colleges, Inc.



# Lifetime Members

**Ralph Alvarez**

**Dr. John Anderson**

**Steve Arena**

**Jeff Baker**

**Joanne Brennan**

**Sr. Dale Brown** (deceased)

**Kathleen Clough** (deceased)

**Nancy Coolidge**

**Judie Crummel**

**Robert Crummel** (deceased)

**Youlonda Copeland-Morgan**

**Addalou Davis**

**Georgette DeVeres**

**Bryan Dickason**

**Sylvia Diegnau**

**Dr. Toni DuBois-Walker**

**Sumner Gambee**

**Mary Gill**

**Mark Hackman** (deceased)

**Dr. Michael Halloran**

**Agustus Hawkins** (deceased)

**Dr. Steve Herndon**

**Robert Huff**

**Dr. Pat Hurley**

**Merilyn Jaeger**

**Joaquin Jimenez**

**Ursula Kaiser**

**Nancy Kull**

**Adele Levine** (deceased)

**David Levy**

**Wayne Mahoney**

**Arthur Marmaduke** (deceased)

**Maureen McRae**

**Gene Miller**

**Jim Moore** (deceased)

**Susan Murphy**

**Esperanza Nee**

**Donna Palmer-Wilson**

**Paul Phillips**

**Pete Prentiss** (deceased)

**Dr. Diane Ryan**

**Donald Ryan**

**Jim Sanderson**

**Jerry Sims** (deceased)

**Becky Stilling**

**George Tenopir**

**George Urdzik**

**Dr. Joseph Watson**

**Alfonso Wilson**



# Helping Homeless Families Find Peace



## Philanthropy 2012

Since 1987, Anaheim Interfaith Shelter/ Halcyon has been serving homeless families with children in our nine month transitional housing program. Through weekly case management services focusing heavily on debt repayment, savings and budgeting classes, these working parents are able to focus on regaining permanent housing and stability for their family. Supportive services include an on-site food pantry, a private, furnished apartment for each family, transportation assistance and access to mental health services, parenting classes and vocational training opportunities.

In addition, childcare services are provided free of charge at our licensed childcare facility, the Halcyon Child Development Center. Located just four blocks from our shelter facility, the center is now a daily support system for not only the families of our shelter but for the extremely low-income children of our neighborhood as well.

In addition to monetary donations, Halcyon house appreciates donations of food, toiletries, diapers and even gently used furniture.

The following is a list of ongoing needs for both the shelter program and the childcare facility that we operate:

### **Apartment Needs:**

- New Twin sized sheets, pillowcases and blankets
- New Pillows
- New Towels

- Household items such as toasters, coffeemakers, dishes, glassware, cutlery and microwaves
- School supplies
- Toiletries – full size rather than travel size
- Sofas, chairs and dining room sets in good condition
- Paper products such as toilet paper and paper towels
- Cleaning supplies

### **Childcare Center Needs:**

- New crib sheets
- New or gently used toddler tricycles or outdoor toys
- Dress up costumes
- Diapers and Wipes
- Art Supplies
- Childrens bicycles (new or used)

### **Food Needs For Both Programs:**

- 100% juice (Apple juice works best)
- Cereal
- Pasta and sauce
- Macaroni & Cheese
- Canned Fruit
- Applesauce
- Canned Vegetables
- Cookies
- Wheat and White Bread
- Graham, Saltine or Ritz Crackers
- Freezable food items

CASFAA is also proud to announce that not only will a representative from Halcyon House join us for lunch on Monday, the organization will match all cash donations made at the conference, up to \$500. Thank you for your support!



## 2012 Committees

### 1040 Workshops

<b>Chair</b>	<b>Kim Thomas</b>	<i>First Marblehead</i>
	<b>Mary Booker</b>	<i>Pomona College</i>
	<b>Luanne Canestro</b>	<i>ASA</i>
	<b>Anne Grethe-Morris</b>	<i>University of San Diego</i>
	<b>Amy Gwilt</b>	<i>California Baptist University</i>
	<b>Mary Hoang</b>	<i>Samuel Merritt University</i>
	<b>Kevin Hoover</b>	<i>Heald College, Fresno</i>
	<b>Natasha Kobrinsky</b>	<i>Graziadio School of Business and Management</i>
	<b>Maureen Mason-Muyco</b>	<i>Solano Community College</i>
	<b>Carolyn Torres</b>	<i>DeVry/Keller Graduate School of Business</i>

### Access and Diversity

<b>Chair</b>	<b>Denise Pena</b>	<i>Dominican University</i>
	<b>Javier Arguello</b>	<i>ITT Technical Institute</i>
	<b>Rosleen Aurora</b>	<i>Casa Loma College</i>
	<b>Dwayne Barnes</b>	<i>Stanford Law School</i>
	<b>Dolores Basilio</b>	<i>Platt College</i>
	<b>Uvaldo Calderon</b>	<i>University of California, Merced</i>
	<b>Nallely Campos</b>	<i>Loyola Marymount University</i>
	<b>Desiree Clarke</b>	<i>Mayfield College</i>
	<b>Tamara Collins</b>	<i>University of LaVerne</i>
	<b>LaToya Davis</b>	<i>The Art Institute</i>
	<b>Audrey Gaspard</b>	<i>La Sierra University</i>
	<b>Mary 'Mi' Hoang</b>	<i>Samuel Merritt University</i>
	<b>Lily Marquez</b>	<i>Samuel Merritt University</i>
	<b>Alfredo Perez</b>	<i>Corinthian Colleges, Inc.</i>
	<b>Lawrence Persky</b>	<i>University of California, Los Angeles</i>
	<b>Maria Elena Ramirez</b>	<i>CSU Channel Islands</i>
	<b>Shandel Roberts</b>	<i>Saybrook University</i>
	<b>Donna San Miguel</b>	<i>California State University, San Marcos</i>
	<b>Merilyn Sweet</b>	<i>NTMA Training Centers</i>
	<b>Debby Unoura</b>	<i>Southern California Institute of Architecture</i>

### Archives

<b>Chair</b>	<b>Joanne Brennan</b>	<i>Career Colleges of America</i>
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### Association Services

<b>Chair</b>	<b>Beryl Schantz</b>	<i>The Art Institute of California</i>
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## CLFE Liaison

Chair	Calvenia Woods	Discover
	Kim Thomas	First Marblehead

## Conference

Chair	Lynne Garcia	Corinthian Colleges, Inc., Inc.
	Angelina Arzate	Palomar College
	Laura Bouche	Brightstar Education Group, Institute of Technology
	Lindsay Crowell	Pepperdine University
	Sunshine Garcia	California State University, Channel Islands
	Brian Heinemann	Copper Mountain Community College
	George Jenkins	Azusa Pacific University
	Lily Marquez	Samuel Merritt University
	Rhonda Mohr	California Community Colleges Chancellor's Office
	Denise Pena	Dominican University
	Alfredo Perez	Corinthian Colleges, Inc.
	Andy Promsiri	UCLA Anderson School of Management
	David Shook	Copper Mountain Community College
	Marcia Starcher	California State University, Pomona

## CSAC Liaison

	Bryan Dickason	California Student Aid Commission
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## CSU Segmental

Chair	Marcia Starcher	California State University, Pomona
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## Electronic Initiatives

Chair	Wayne Mahoney	Southwestern School of Law
	Dennis Schroeder	LA Mission College

## Federal Issues

Chair	Noelia Gonzalez	California State University, Stanislaus
	Angelina Arzate	Palomar College
	Laura Bouche	Brightstar Education Group, Institute of Technology
	Desiree Clarke	Mayfield College
	Lindsay Crowell	Pepperdine
	Casey Dinsmore	California State University, Chico
	Mary Gill	Consultant/Lifetime CASFAA Member
	Carolyn Guel	San Jose State University
	Ena Hull	IEC Colleges
	Lily Marquez	Samuel Merritt University
	Melissa Moser	Orange Coast College
	Denise Pena	Dominican University
	Anafe Robinson	LA Pierce College
	Marcia Starcher	California State University, Pomona
	Robin Thompson	Pitzer College



## **Fiscal Planning**

<b>Chair</b>	<b>Sunshine Garcia</b>	<i>California State University, Channel Islands</i>
	<b>Dewayne Barnes</b>	<i>Stanford University, School of Law</i>
	<b>Wayne Mahoney</b>	<i>Southwestern School of Law</i>
	<b>Melissa Moser</b>	<i>Orange Coast College</i>

## **Fund Development**

<b>Chair</b>	<b>Kerri Helfrick</b>	<i>Corinthian Colleges, Inc.</i>
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## **Graduate and Professional Issues**

<b>Chair</b>	<b>Lily Marquez</b>	<i>Samuel Merritt University</i>
	<b>Cheryl Barnes</b>	<i>Citibank</i>
	<b>Dewayne Barnes</b>	<i>Stanford School of Law</i>
	<b>Heather Garcia</b>	<i>Great Lakes</i>
	<b>Sun Ow</b>	<i>Great Lakes</i>
	<b>Shandel Roberts</b>	<i>Saybrook University</i>
	<b>Jamie Shrode</b>	<i>Haas School of Business</i>
	<b>Kim Thomas</b>	<i>First Marblehead</i>

## **High School Relations**

<b>Chair</b>	<b>Anafe Robinson</b>	<i>Pierce College</i>
	<b>Angelina Arzate</b>	<i>Palomar College</i>
	<b>Nallely Campos</b>	<i>Loyola Marymount University</i>
	<b>Jacque Carroll</b>	<i>American Student Assistance</i>
	<b>Despina Costopoulos</b>	<i>California Student Aid Commission</i>
	<b>Bryan Dickason</b>	<i>California Student Aid Commission</i>
	<b>Doris Keller</b>	
	<b>Nina Martinez</b>	
	<b>Maureen Mason-Muyco</b>	<i>Solano College</i>
	<b>Melissa Moser</b>	<i>Orange Coast College</i>
	<b>Jasmine Murphy</b>	<i>Sacramento State University</i>
	<b>Ruby Nieto</b>	<i>ECMC</i>
	<b>Yolanda Ojeda</b>	<i>CET</i>
	<b>Mary Snyder</b>	
	<b>Robert Weinert Jr.</b>	

## **Independent Segmental**

<b>Chair</b>	<b>Robin Thompson</b>	<i>Pitzer College</i>
	<b>Matthew Biergan</b>	<i>Pomona College</i>
	<b>Eddie Arteaga</b>	<i>Marymount College (formerly College Board)</i>
	<b>Chung-Fen Hsieh</b>	<i>The College Board</i>

## **Newsletter**

<b>Editor</b>	<b>Kerri Helfrick</b>	<i>Corinthian Colleges, Inc.</i>
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## Nominations and Elections

Chair	Deb Barker-Garcia	Corinthian Colleges, Inc.
	Melissa Moser	Orange Coast College

## Proprietary

Chair	Laura Bouche	Brightstar Education Group, Institute of Technology
	Taisha Azlin-Wright	Trident University
	Dolores Basilio	Platt College
	Theresa Costa	Institute of Technology
	Gilda De La Rosa-Rodriguez	Institute of Technology
	Sharon Mcintosh	BrightStar Education Group, Institute of Technology
	Michael Morcos	MAAS Companies
	Emily Valdovinos	ITT Technical Institute
	Laurie Vulich	BrightStar Education Group, Institute of Technology

## Site Selection

Chair	Deb Barker-Garcia	Corinthian Colleges, Inc.
	Wayne Mahoney	Southwestern School of Law
	Melissa Moser	Orange Coast College

## State Issues

Chair	Craig Yamamoto	San Diego State University
	Angelina Arzate	Palomar College
	Deb Barker-Garcia	Corinthian Colleges, Inc.
	Laura Bouche	BrightStar Education Group
	Margie Carrington	Cañada College
	Lindsay Crowell	Pepperdine University
	Catherine Graham	Loyola Marymount University
	Mary Gill	Retired, Lifetime member
	Patricia Hurley	Glendale Community College
	Mary Lindsey	Fashion Institute of Design & Merchandising
	Lily Marquez	Samuel Merritt University
	Melissa Moser	Orange Coast College
	Michael Morcos	MAAS Company
	Anafe Robinson	LA Pierce College
	Marcia Starcher	California State University, Pomona
	Robin Thompson	Pitzer College

## Strategic Planning

Chair	Lynn Fox	University of the Pacific
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**Summer Training**

<b>Chair</b>	<b>Natasha Kobrinsky</b>	<i>Graziadio School of Business and Management</i>
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**Training/Professional Development**

<b>Chair</b>	<b>Rhonda Mohr</b>	<i>California Community Colleges Chancellor's Office</i>
	<b>Natasha Kobrinsky</b>	<i>Graziadio School of Business and Management</i>
	<b>Thalassa Naylor</b>	<i>Sallie Mae</i>
	<b>Kim Thomas</b>	<i>First Marblehead</i>

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**UC Segmental**

<b>Chair</b>	<b>Lindsay Crowell</b>	<i>Pepperdine University</i>
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**US Department of Education Liaison**

<b>Bruce Honer</b>	<i>United States Department of Education</i>
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**Volunteer Coordinator**

<b>Kim Thomas</b>	<i>First Marblehead Corporation</i>
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**Webmaster**

<b>Katherine Williams</b>
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# 2012 Exhibitors



There's No Place Like Home



# Business Meeting

## 2011 CASFAA Business Meeting Minutes

December 13, 2011 – Sacramento Convention Center, Sacramento, CA

**Present:** CASFAA Association Members

**Call to Order:** CASFAA President Lynn Fox  
called the meeting to order at 9:25 AM

**Motion:** Joanne Brennan moved to approve the minutes from  
the December 2010 Meeting held in San Diego

**Moved:** by Lawrence Persky

**2nd:** by Melissa Moser  
without any abstentions or motion against

**Motion Carried**

**Treasurer's Report:** Joanne Brennan

CASFAA has approximately \$896,363  
combined in cash and assets.

The Conference bills are still outstanding.

**Motion:** To Approve the Treasurer's Report as presented

**Moved:** by Melissa Moser

**2nd:** by Sunshine Garcia with no abstentions

**Motion Carried**

**Old Business:** None

**New Business:** None

**Motion:** Melissa Moser moved to adjourn the meeting

**2nd:** by Sunshine Garcia with no abstentions

**Motion Carried**

**Adjournment:** The meeting was adjourned by Lynn Fox at 9:30 AM

# Featured Speakers

## Justin Draeger

President and CEO of the National Association  
of Student Financial Aid Administrators



Justin Draeger, is President and CEO of the National Association of Student Financial Aid Administrators. He is a first-generation, undergraduate and graduate degree recipient with over 14 years’ experience in assisting disadvantaged populations achieve their goals and better their communities, including 10 years in administering, interpreting, communicating, or developing student aid policy. He serves as the primary voice of NASFAA and as the liaison between the association and members, education community partners, the Congress, the White House, the U.S. Department of Education, other government agencies, and the media. As a spokesperson of the association, Justin has been featured on The Today Show on NBC, National Public Radio, CNBC, C-SPAN and in numerous national publications. Justin began his career in student aid working as a financial aid director at the Douglas J Aveda Institute in East Lansing Michigan and went on to work for the Michigan Guaranty Agency as a lead regulatory analyst before joining NASFAA in 2006. Prior to his appointment as President, Justin worked in the communications and public policy departments at NASFAA. Justin volunteers and serves on the board of regents of Baker College and other organizations that promote health and education, including Pueblo-a-Pueblo, a charitable nonprofit that seeks to build sustainable, viable and healthy indigenous communities in Guatemala. He earned a Bachelor’s of Science Degree in Resource Management from Brigham Young University and a Master’s in Business Administration Finance from Baker College.

Sunday, December 9	Keynote	1:00 PM – 3:00 PM	Marquis Ballroom
Sunday, December 9	Session A5	3:15 PM – 4:30 PM	Orange County 3



## Featured Speakers

### **Youlonda Copeland-Morgan**

*Associate Vice Chancellor for Enrollment Management, UCLA*



Youlonda Copeland-Morgan, Associate Vice Chancellor for Enrollment Management at UCLA, has been a recognized leader in higher education for more than 30 years. She served a two-year term (2008-2010) as chairman of the Board of Trustees of the College Board and in 2009, was appointed vice chair of the College Board's Advocacy and Policy Center, which was established with support from the Bill and Melinda Gates Foundation to help transform education in America. In 2010, Copeland-Morgan was invited by Vice President Joe Biden to serve as an expert witness in a town hall meeting on the White House Middleclass Task Force. Copeland-Morgan is also serving a three-year term on the Advisory Council for the UNCF/Gates Millennium Scholars and just completed an extraordinary year as chair of the Committee on Access and Diversity for the National Association of Student Financial Aid Administrators where she was awarded Committee of the Year for the outstanding contributions her committee made to the advancement of scholarship and services to colleges and universities that serve minority, first generation and low-income students.

In a distinguished career that spans 33 years, Copeland-Morgan has held numerous leadership positions in enrollment management, admission and student financial aid and has been honored for her commitment to sound enrollment management and financial aid policy that affects access, equity, and minority participation in higher education. As co-chair of the College Board's Task Force on College Access for Students from Low-Income Backgrounds, she received national recognition for her leadership and innovation in creating the CollegeKeys Compact. At the state, regional and national level, she has been honored with distinguished service awards from numerous higher education associations, including the National Association of Student Financial Aid Administrators (NASFAA), the California Association of Student Financial Aid Administrators (CASFAA), the Western Association of Student Financial Aid Administrators (WASFAA) and the College Board's Western Region. In 2006, NASFAA presented her with its Leadership Award, and CASFAA bestowed its highest honor, the Lifetime Membership Award, in recognition of her contributions to the profession. In 2012, she was awarded The Publisher's Choice Award in Education Administration by the Inland Empire News (California).

She has served several terms on the board of directors of NASFAA and WASFAA. Additionally, she has served as president of WASFAA, as chair of the College Board's CSS Council, and its Financial Aid Standards Advisory Committee, and for the past nine years, as a trustee of the College Board. She also serves on the board of P&P Home for the Elderly, a multimillion dollar senior housing facility in Los Angeles.

Copeland-Morgan is a member of the College Board's distinguished College Scholarship Service Hall of Fame, which honors individuals who have made significant contributions to the best practices in financial aid, the body of knowledge underpinning the financial aid profession, development of successful advocacy and outreach programs, and development of meaningful training or professional leadership development programs.

Prior to UCLA, Copeland-Morgan was at Syracuse University where she held the position of Associate Vice President of Enrollment Management.

Sunday, December 9	Opening Session	1:00 PM – 3:00 PM	Marquis Ballroom
Sunday, December 9	Session A7	3:15 PM – 4:30 PM	Salon H

## Featured Speakers

### **Diana Fuentes-Michel**

*Executive Director of the California Student Aid Commission*



Diana Fuentes-Michel was appointed Executive Director of the California Student Aid Commission (Commission) on May 5, 2003, bringing with her an extensive background in higher education program administration, policy development and state and federal governmental advocacy. A proud recipient of a Cal Grant B from 1975-1979, Fuentes-Michel credits the Cal Grant Program with providing the financial support she needed to become the first in her family to receive a college degree.

Her work in public policy and program administration has focused on increasing educational opportunity, student access and financial aid through involvement with the enactment of the Cal Grant Entitlement Program and the state's Scholarshare Investment Program. Fuentes-Michel's passion and commitment to serving low-income first generation college students led to the establishment of a statewide financial aid public awareness program, Cash for College, which partners with private business and community based organizations to provide scholarship assistance and hands on workshops in both English and Spanish. During 2011, more than 600 Cash for College workshops were held in 50 California counties, motivating students to fill out the necessary applications for all available forms of financial aid.

Fuentes-Michel has enjoyed a distinctive career in higher education and government. She was Director of Public Affairs for the University of California and Vice Chancellor for the California Community Colleges. As Undersecretary for former California Secretary for Education, John Mockler, she advised the Governor on higher education policy and legislation and assisted the Governor in the appointment process for numerous education boards and commissions. She also served as Assistant Secretary for Higher Education from 1999-2000 under former Senator and Secretary of Education Gary Hart. Prior state service includes ten years as legislative and budget staff to the California Postsecondary Education Commission, legislative aide to former Assembly Member Peter Chacon and as a budget analyst for the California Department of Finance.



Under her leadership, the Commission's Cal Grant and specialized programs have expanded to provide financial aid to more than 330,000 eligible students in 2010-11 (attending both private and public California higher education institutions) from less than 248,000 eligible students in 2003-04. Commission staff initiated the WebGrants4Students program to provide 24/7 access for students to track their grant applications, and a Voice-activated Response System in the Commission's call center to expedite information sharing with the general public. Fuentes-Michel also led staff in making improvements in the Cal Grant Grade Point Average Verification System and regional school training initiatives. In

addition, the Commission, under her leadership, implemented a real-time grant delivery system in 2008-09 to streamline administrative processes and information sharing between Commission staff, financial aid offices, students and parents.

Fuentes-Michel is a 1975 graduate of Sacred Heart High School located in the Lincoln Heights community of Los Angeles, California. She graduated from Loyola Marymount University in Los Angeles with a Bachelor of Arts in History and Chicano Studies and also holds a Master of Arts degree in Government from California State University, Sacramento. She is a 1979 California State Senate Fellow and a member of the national Jesuit honor society, Alpha Sigma Nu.

Fuentes-Michel and her husband, Dr. Jose Michel, have three daughters and reside in Sacramento, California.

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<b>Monday, December 10</b>	<b>CSAC Update and Town Hall</b>	<b>8:30 AM – 10:00 AM</b>	<i>Marquis Ballroom</i>
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## Featured Speakers

### Jeff Baker

*Director of the Policy Liaison  
and Implementation Staff  
Federal Student Aid*



Jeff Baker is no stranger to financial aid. He has been a student aid professional for more than 35 years, starting at the University of Wisconsin at Milwaukee and including almost 20 years at San Francisco State University. Prior to entering the field of financial aid, Jeff was a high school teacher in Port Washington Wisconsin. For the past 18 years Jeff has been at the Department of Education where he is currently the Director of the Policy Liaison and Implementation Staff for the Department's Federal Student Aid office. In that capacity he advises senior FSA management on all statutory, regulatory, and policy matters that relate to the Title IV Federal student aid programs.

Jeff holds a B.S. in Management from Northeastern University, an M.S. in Education from the University of Wisconsin and has done postgraduate work in higher education administration at the University of Southern California.

Throughout his financial aid career, Jeff has been an active member of NASFAA serving as a committee chair, trainer and twice as a Commission Director. He is a past member of the WASFAA Executive Council and a Past President of the California association.

Jeff is the recipient of numerous awards, including NASFAA's Meritorious Achievement Award and Regional and State Leadership Award. He has been honored by WASFAA with their Creative Leadership Award and Lifetime Membership Award and is the recipient of a Distinguished Service Award, President's Award and Lifetime Membership Award from the California association. Jeff is also the recipient of a Distinguished Service Award from The College Board.

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**Tuesday, December 11**

**Federal Update  
and Town Hall**

**9:00 AM – 11:00 AM**

*Marquis Ballroom*



# Entertainment

## CASFAA Sunday Evening Reception

**Sunday, December 9, 2012**

**4:30 PM – 6:00 PM**      *Exhibit Hall, Grand Ballrooms E and F*

Come mingle with colleagues in our Exhibit Hall as you enjoy light refreshments and pick up your Disney Park ticket and Survival Kit!

**4:00 PM – PARK CLOSE**      *Disney Park Night Sponsored by Access and Diversity*

Enjoy a night on your own at either Disneyland or Disney California Adventure Park. Complimentary bus transportation will be provided to and from the hotel.

## A Night at the OzDust Ballroom

**Monday, December 10, 2012**

**6:00 PM – 11:30 PM**      *Marquis Ballroom*

Bring your dancing shoes and dress to impress as we transform the Anaheim Marriott into the OzDust Ballroom!

A no-host cocktail reception in the foyer will be followed by a wickedly delicious dinner. Hold on to your hats as the wind begins to blow and we find ourselves transported to Oz where Mazel Music will play host, spinning a variety of music to get everyone out on the dance floor! We'll even have a photo opportunity to capture all the memories!

It's sure to be a fabulous way to end a day packed with informative sessions. Follow the yellow brick road and see you there!



# Conference Program

**Saturday, December 8, 2012**

Registration Booth Open	<b>7:00 AM – 5:00 PM</b> Center Registration
CCCSFAAA Executive Council Meeting	<b>8:00 AM – Noon</b> Orange County Ballrooms 1, 2 and 3
CCCSFAAA Pre-Conference Workshop <i>(For registered pre-conference attendees only)</i>	<b>1:00 PM – 5:00 PM</b> Orange County Ballrooms 1, 2 and 3
CASFAA Proprietary Pre-Conference Workshop <i>(For registered pre-conference attendees only)</i>	<b>9:00 AM – 5:00 PM</b> Grand Ballroom, Salons J and K
CASFAA Graduate and Professional Symposium <i>(For registered pre-conference attendees only)</i>	<b>9:00 AM – 5:00 PM</b> Grand Ballroom, Salons G and H

**Sunday, December 9, 2012**

Registration Booth Open	<b>7:00 AM – 5:00 PM</b> Center Registration
CCCSFAAA Segmental Breakfast and Keynote Speaker <i>(For registered pre-conference attendees only)</i>	<b>8:30 AM – 11:30 AM</b> Orange County Ballrooms 1, 2 and 3
CASFAA Proprietary Pre-Conference Workshop <i>(For registered pre-conference attendees only)</i>	<b>9:00 AM – Noon</b> Grand Ballroom, Salons J and K
Opening Session  Welcome Home to the 2012 CASFAA Conference: <i>Featured Speaker:</i>	<b>1:00 PM – 3:00 PM</b> Marquis Ballroom  <b>Youlonda Copeland-Morgan</b> Associate Vice-Chancellor, Enrollment Management, University of California at Los Angeles
<i>Keynote Speaker:</i>	<b>Justin Draeger</b> , NASFAA President
Exhibit Hall open	<b>3:00 PM – 6:00 PM</b> Grand Ballrooms E and F
Afternoon Break with Exhibitors	<b>3:00 PM – 3:15 PM</b> Grand Ballrooms E and F

# Concurrent Interest Sessions – A

3:15 PM – 4:30 PM

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## Session A1

Salon B

### Working with the Eligible Non-Citizen: Citizenship Documentation and Beyond

This session will cover the citizenship and non-citizen eligibility statuses, confirming eligibility, DHS issues and resolution options.

Moderator: **Margie Carrington**, Cañada College

Speaker: **Virginia Hagins**, U.S. Department of Education, Federal Student Aid

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## Session A2

Salon C

### 3 Year CDR: Managing, Understanding, & Utilizing the Challenge and Appeal Process

Join proven Default Management expert, Tommy Sims as he explores the “new” 3-year Cohort Default Rate (CDR) and the effects of the rates after 3 consecutive years, with emphasis placed on the monitoring of school’s student loan portfolios and CDRs. You will be guided through the calculation, challenge, and appeal processes (including a special focus on loan servicing appeals).

Moderator: **Judith Witherspoon**, EdFinancial Services

Speaker: **Tommy Sims**, ECMC

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## Session A3

Salon D

### Cal Grants 101

This session is intended to give new Cal Grant program participating schools or staff members a basic overview of the Cal Grant program: application, awarding, notifications, school payments and reconciliation.

Moderator: **Angelina Arzate**, Palomar College

Speakers: **Bryan Dickason**, California Student Aid Commission

**Tae Kang**, California Student Aid Commission

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## Session A4

Salon G

### Ins and Outs of Student Loan Repayment

While students receive information during loan counseling, they often have questions about how loan repayment works. Designed for students and financial aid administrators, this session describes the repayment options available to students as they prepare to enter the workforce. Topics include: taking inventory of your student loans; understanding the available repayment plans (including Income-Based Repayment) and the advantages of each; reviewing the details of consolidation; and learning about deferment, forbearance, forgiveness, and cancellation options.

Moderator: **Amy Kasper**, TG

Speaker: **Joe Braxton**, TG

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## Concurrent Interest Sessions – A

3:15 PM – 4:30 PM

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**Session A5**

Orange County 3

**Standardized Award Letters, Shopping Sheets, & Trends in Consumer Disclosure**

The Shopping Sheet was released by the Department of Education and the Consumer Financial Protection Bureau in July 2012 for voluntary use by schools for the 2013-2014 academic year. In addition, other federal agencies and Congressional proposals seek to increase transparency in college costs. NASFAA created the Award Notification & Consumer Task Force to make recommendations about the things that should be included when providing information to students about financial aid. NASFAA President Justin Draeger will present on the various consumer disclosure proposals from the Administration and Congress and provide NASFAA's view on how these proposals will work (or won't) for students.

*Moderator:* **Tim Bonnel**, California Community Colleges Chancellor's Office

*Speakers:* **Justin Draeger**, NASFAA President

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**Session A6**

Orange County 4

**Welcome to CASFAA**

Are you new to CASFAA or perhaps you've been around a while but just want to have a better understanding of what we do and meet who has been elected to leadership positions. Have you always wanted to volunteer or run for an executive council office but just didn't know where to start? This is the session that will answer all of these questions. Led by your CASFAA President and members of the Executive Council, you can look forward to walking away with a true understanding of what CASFAA can bring to your professional life and how you can get further involved.

*Moderator:* **Deb Barker-Garcia**, Corinthian Colleges, Inc.

*Speaker:* **CASFAA 2012 Executive Council**

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**Session A7**

Salon H

**If Only I Had Known...**

As we progress on our journey from financial aid staff to administrators and beyond, there are many things that we learn the hard way; things we wish someone had warned or advised us about much earlier in our career. Today, a panel of colleagues will be sharing their tricks to simplify tedious processes, deal with employees, student and upper management issues, shortcuts in financial aid administration, and other "tricks of the trade" that they have learned along the way in their rise to veteran status. Don't be the one saying, "If Only I Had Known..."

*Moderator:* **Marcia Starcher**, Cal Poly Pomona

*Speakers:* **Diana Minor**, Cal Poly Pomona

**Sherrie Padilla**, Antelope Valley College

**Youlonda Copeland-Morgan**, UCLA

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**Session A8**

Salon A

**What Were They Thinking?****Student Perceptions of Financial Aid and What Colleges Can Do To Help**

A recent study published by the College Board and Art & Science Group, LLC, reported that more than half of the students surveyed had ruled out colleges on the basis of sticker price alone without considering their likely financial aid awards. This session will review the findings of the survey, gain insights from practitioners about their

experiences, and discuss ways in which colleges can combat misinformation and better engage in discussions around college affordability.

**Moderator:** **Denise Pena**, Dominican University

**Speakers:** **Shelley Arakawa**, College Board

**Cruz Grimaldo**, UC Berkeley

**Dan Waite**, Loyola Marymount University

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## Session A9

Salon K

### Private vs. PLUS Loan Programs

This year several changes went into effect within the Federal Direct Loan Program; most notably, parents and graduate students will be responsible for paying the full 4% origination fee on new PLUS loans. Now, more than ever, it is important for students and families to thoroughly review all of their education funding options. Listen in as representatives from national lenders discuss facts versus myths between a private student loan and a PLUS loan. The session will cover an overview of responsible borrowing, a comparison of the two programs, and what you can do to help educate your students and families.

**Moderator:** **Cheryl Barnes**, Wells Fargo

**Speakers:** **Sharee Brend**, National Council of Higher Education Programs

**Jack Edwards**, Stanford University, WASFAA President

**Michael McFarlane**, Citizen's Bank

**Julie Rehder**, ELM

**Daniel Roddick**, UC Berkeley

**Kim Thomas**, First Marblehead Corporation

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## Session A10

Salon J

### The Integrated Postsecondary Education Data System (IPEDS): What You Need To Know

This session will provide an overview of IPEDS and upcoming changes to the data collection. In addition, there will be a discussion of the increasing visibility of IPEDS data and why it is important for institutional administrators to be informed about how IPEDS data are used in the public domain by both governmental and non-governmental entities.

**Moderator:** **Sara Chavez**, Corinthian Colleges, Inc.

**Speaker:** **Vicki Linne-Robinson**, Corinthian Colleges, Inc.

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## Business Partner Solutions – A

3:15 PM – 4:30 PM

Business Partner Solutions sessions are designed to give our attendees the opportunity to learn about our vendor partners' products and services. CASFAA does not endorse any products or services and is not responsible for the content of the Business Partners Solutions sessions.

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### Session A11 – Business Partner Solutions

La Jolla

#### CardFlex: Financial Services on Campus,

#### the Pros and Cons of Providing an Institution Sponsored Solution

After a brief overview to help explain the evolving banking and PR climate surrounding the various options (bank accounts, debit cards, etc.) and compliance issues, the presentation will focus on three topics: Benefits to Students, Benefits to the Institution and Pitfalls to Avoid. The goal is to arm Financial Aid Administrators with the knowledge necessary to determine if a particular solution is a good fit for their campus.

**Speaker:** **Trae Cassell**, CardFlex

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**Session A12 – Business Partner Solutions**      *Los Angeles*
**CMD Solutions: Outsourcing Communications (phones/e-mail, etc.)**
**for Financial Aid and other Administrative Offices**

Many schools are overwhelmed with students and parents trying to contact their administrative offices, such as financial aid. For most schools, large numbers of phone calls and e-mails have resulted in frustrated students, processing backlogs, and staffing issues. Learn how outsourcing works and how it can not only alleviate these issues, but transform your office into a model for customer service and cost savings for your institution.

**Speaker:**      **David Cooper**, CMD Outsourcing Solutions

**Session A13 – Business Partner Solutions**      *Rancho Las Palmas*
**National Student Loan Clearinghouse: Where did they come from and where have they gone?**

Tracking Postsecondary Student transfers, persistence and debt: The National Student Clearinghouse facilitates the exchange of 94+% of the enrollment reporting records of current students( free SSCR reporting service). Data provided by 3300+ institutions have enabled the Clearinghouse to provide school administrators with Student enrollment histories, degree completions and student loan location and payment statuses through our low cost/free StudentTracker service. Financial Aid and Career Placement Administrators, Institutional Researchers, and Risk Management Officers can conduct real-time individual student queries or request Excel formatted cohort reports on admitted and matriculated students as well as recent graduates.

**Speakers:**      **Robert Haushalter**, National Student Clearinghouse

**Sue Ledwell**, National Student Clearinghouse

**Session A14 – Business Partner Solutions**      *Newport Beach*
**Nelnet: Nelnet's Responsible Repay Can Help Your Students Stay on Track**

When your students have trouble repaying their education loans, it can hurt their financial wellness for life. What's more, it also places a financial burden on your school, decreasing your ability to best serve your students. That's why Responsible Repay wants to partner with your school. We communicate with your students on your behalf before payments begin, and also when payments are late. When you partner with Responsible Repay, we make it easy for your students to enjoy a life of financial stability and freedom.

**Speaker:**      **Jeffrey Recker**, Nelnet

Opening Night

**4:30 PM – 6:00 PM**

Reception with Exhibitors

*Grand Ballrooms E and F*

**Pick up your Disney Park Ticket and Survival Kit!** (Tickets valid from 4:00 PM until park closes)

## Monday, December 10, 2012

Registration Booth Open

**7:00 AM – Noon**

*Center Registration*

Breakfast

**7:30 AM**

*Marquis Ballroom*

California Student Aid Commission (CSAC) Update and Town Hall:

*Featured Speaker:*

**Diana Fuentes-Michel**

*Executive Director, CSAC*

Exhibit Hall open

**10:00 AM – 11:30 AM**  
Grand Ballrooms E and F

Morning Break with Exhibitors

**10:00 AM – 10:15 AM**  
Grand Ballrooms E and F

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## Concurrent Interest Sessions – B 10:15 AM – 11:30 AM

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Session B1

Salon A

### Verification 101

This session will cover the fundamentals and philosophy of the verification process in addition to an in-depth analysis of the 2012-13 rules and requirements. This will also be a great opportunity to ask a federal trainer questions about the verification process.

Moderator: **Peggy Fikse**, Modesto Junior College

Speakers: **Virginia Hagins**, U.S. Department of Education, Federal Student Aid

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Session B2

Salon B

### Return of Title IV Funds – Programs of Study Taught in Modules

This session will cover the unique rules exclusive to modular programs when administering R2T4. Examples will be provided on determining when a student is considered a withdrawal from a modular program and how that affects the R2T4 administration process.

Moderator: **Brian Heinemann**, Cooper Mountain College

Speaker: **Suzanne Scheldt**, U.S. Department of Education, Federal Student Aid

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Session B3

Orange County 4

### Pell Grant Program Update

This session will discuss recent changes to the Pell Grant Program and focuses on the new Pell Grant Lifetime Eligibility limits.

Moderator: **Maureen Mason-Muyco**, Solano Community College

Speaker: **Robert Vallas**, U.S. Department of Education, Federal Student Aid

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Session B4

Salon C

### DL/COD Processing-Hot Topics

Confused about what to do with loans having incorrect rebates? Muddled about how other recent regulatory changes impact your DL processing? Unsure of how to process PLUS loans and credit checks? Mystified about what the COD Newsbox is and what it can do for you? The answers to these questions as well as a sneak preview of upcoming COD/DL processing changes will be covered in this session.

Moderator: **Pat Robles-Friebert**, Inceptia

Speaker: **Chuck Hireman**, U.S. Department of Education, Federal Loan School Support Team

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## **Concurrent Interest Sessions – B** 10:15 AM – 11:30 AM

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**Session B5***Salon D***Developing Effective Default Management Plans**

Ever wonder who the students are that end up defaulting on their student loans? Want to learn more about them so you can improve future borrower success? Need to write up your school's default prevention plan and don't know where to start? This session will review the Department of Education's sample default management plan. This information is used for developing more effective default prevention efforts on campus, both front-end and back-end. Join us for this informative session where you'll learn how to improve student success by creating or enhancing your schools default management plan.

*Moderator:* **Alfredo Perez**, *Corinthian Colleges, Inc.*

*Speaker:* **Dennis Zanchi**, *ECMC*

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**Session B6***Orange County 3***California Dream Act**

Assembly Bills 540, 130, and 131, together they are the California Dream Act. A new student population will be receiving state student financial assistance. This session will outline the California Student Aid Commission's efforts in implementing a common Dream Act Application to supply student data to campuses.

*Moderator:* **Dennis Schroeder**, *Los Angeles Mission College*

*Speakers:* **Bryan Dickason**, *Manager Program Administration, CSAC*

**Catalina Mistler**, *Chief Program Administration & Services*

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**Session B7***Salon G***Veterans Affairs-Reporting and Processing Tuition and Fees**

The advent of the Post-9/11 GI BILL has added layers of complexity to VA education benefits. This presentation will cover reporting tuition and fees with discounts, rules for returning funds to the VA, returning funds to the student, as well as handling erroneous payments from Muskogee.

*Moderator:* **Kerri Helfrick**, *Corinthian Colleges, Inc.*

*Speakers:* **Robert Curry**, *San Diego Regional Veterans Affairs*

**Shane Ferrebee**, *San Diego Regional Veterans Affairs*

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**Session B8***Salon H***Using NASFAA Tools to Assess Your Financial Aid Operations**

NASFAA's financial aid management tools can help you evaluate and improve your school's administration of Title IV and other student aid programs. The session will 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. Learn more about these tools and hear how to use them on your campus.

*Moderator:* **Kim Westby**, *Cerritos Community College District*

*Speaker:* **David Tolman**, *NASFAA*

**Melissa Mosser**, *Orange Coast College*



### Maximizing Student Awards: A Dialog about Award Displacement

Outside scholarship providers and colleges come together to discuss ways that colleges and scholarship providers can work together to facilitate access, retention and graduation of students. Some of the issues that will be addressed include students getting caught in the gap between institutional methodology (IM) and federal methodology (FM), EFC Calculations, the displacement of scholarship funds by instructional outside-scholarship policies, using scholarships as a recruitment tool for student access, and the need for clarity concerning out-of-pocket costs, gapping and types of aid in financial aid award letters.

**Moderator:** Jacey Shillan, Fastweb.com

**Speakers:** Gregorio Alcantar, California State University, Northridge

Natasha Kobrinsky, Pepperdine University, Graziadio School of Business and Management

Kadar Lewis, Magic Johnson Foundation

Cynthia Neyra, Simon Family Foundation

Bob Patterson, Zinch

Vicki Wedmore, Scholarship Foundation of Santa Barbara

### The Value of Private Lender Lists and Keeping it Simple

Looking for ways to keep your private lender list simple? This session is designed to help you understand the regulatory requirements and steps needed to create a neutral lender list.

**Moderator:** Debby Unoura, Southern California Institute of Architecture

**Speakers:** Heather Garcia, Great Lakes

Kim Thomas, First Marblehead

Callie Woods, Discover Student Loans

Daniel Reed, Point Loma Nazarene University

Denise Pena, Dominican University

## Business Partner Solutions – B

10:15 AM – 11:30 AM

*Business Partner Solutions sessions are designed to give our attendees the opportunity to learn about our vendor partners' products and services. CASFAA does not endorse any products or services and is not responsible for the content of the Business Partners Solutions sessions.*

### ELM: The Elm Solution

Looking for a streamlined method for alternative loan processing? Are you currently using ELM's products and services? Are you interested in learning how ELM can help you manage your lender list information in a compliant, interactive way? This session explores ELM's industry leading products and services and how current and upcoming enhancements can alleviate your private loan processing workload and lender list maintenance.

**Speaker:** Julie Moreno-Rehder, ELM



## Business Partner Solutions – B

10:15 AM – 11:30 AM

Session B12 – Business Partner Solutions

Los Angeles

### TG: Successful Repayment – It's More Than Preventing Default

As we enter an era of greater accountability for successful student loan repayment, we must look beyond traditional methods of preventing default. Whether you're looking for innovative ways to help with default management, or are interested in learning how to enlist other stakeholders at your institution in promoting repayment success, TG can help. This session will include a discussion of some of the challenges involved in educating faculty and staff, working with student loan borrowers, and getting all parties working toward successful repayment. You'll learn how a comprehensive approach that addresses each stage in the life of a student loan can help you make more efficient use of scarce resources while allowing your team to focus on serving current students. Finally, it will discuss some of the tools and resources available to assist with your efforts.

Speaker: **Chris Scott**, TG

Session B13 – Business Partner Solutions

Newport Beach

### Veri-Tax: I Need Tax Transcripts NOW: Tips and Tricks of IRS Tax Transcript Retrieval

Discover the various methods of tax transcript retrieval and learn how to avoid common mistakes and overcome the challenges your financial aid department may encounter. Learn tips and tricks from Veri-Tax, the company who pioneered electronic IRS tax transcript delivery in 1999.

Speaker: **Maria Kirgan**, Veri-Tax

CASFAA Awards Luncheon	<b>11:30 AM – 12:45 PM</b> Marquis Ballroom
Exhibit Hall Open	<b>2:00 PM – 5:00 PM</b> Grand Ballrooms E and F

## Concurrent Interest Sessions – C

12:45 PM – 2:00 PM

Session C1

Salon A

### New Rules for Verification 13-14 and beyond

This session will cover the 2013-2014 Verification requirements, IRS Data Retrieval and updates on IRS related issues.

Moderator: **Brian Heinemann**, Cooper Mountain College

Speaker: **Virginia Hagins**, U.S. Department of Education, Federal Student Aid

Session C2

Salon B

### SAP 101 - A Whole New World - Rules & Further Guidance on an Old Topic

This session will define the components that make up a school's Satisfactory Academic Progress policy, including repeated coursework, maximum timeframe, financial aid warning, financial aid probation, and academic plans. It will also describe a school's

options in setting up their SAP, and the mechanisms that will trigger different SAP statuses for students. Checking SAP for clock hour programs will be included.

*Moderator:* **Maureen Mason-Muyco**, Solano Community College

*Speaker:* **Robert Vallas**, U.S. Department of Education, Federal Student Aid

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### Session C3

Salon C

#### Transitioning into a Clock Hour Program Environment – Part I

This is part one of a two part series. In addition to basic clock hour concepts, this session will cover payment periods, TIV program calculations, SAP (including the new pace examples), R2T4 highlights and other considerations. This is a great session for those who are new to clock hour programs and would like to ask a federal trainer questions on the issue.

*Moderator:* **Melissa Moser**, Orange Coast College

*Speaker:* **Suzanne Scheldt**, U.S. Department of Education, Federal Student Aid

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### Session C4

Orange County 3

#### Loan Servicing Update

The servicing landscape has changed dramatically and this session will assist schools in navigating a multiple servicer environment with a focus on understanding the various entities and their roles; our Not for Profit (NFP) servicers; and our strategy going forward as we transition the current federal portfolio.

*Moderator:* **Judith Witherspoon**, EdFinancial Services

*Speaker:* **Cynthia Battle**, U.S. Department of Education

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### Session C5

Salon D

#### Program Reviews & Audits

This session will give you an overview of the most common audit and program review findings, including approaches or solutions on how to avoid them at your institution. We will also discuss preparing for an audit at your campus.

*Moderator:* **Dennis Christich**, Inceptia

*Speaker:* **Linda Buchanan**, Corinthian Colleges, Inc.

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### Session C6

Orange County 4

#### CSAC Special Programs

This session is intended to provide an overview of specialized programs administered by the California Student Aid Commission (CSAC) such as the California Chafee Foster Youth Program (Chafee), the California National Guard Education Assistance Award Program (CNG EAAP) and other smaller specialized programs. CSAC staff will also cover recent legislative changes to the Assumption Program of Loans for Education (APLE) and the State Nursing Assumption Program of Loans for Education (SNAPLE). Participants will leave this session with a better understanding of other CSAC financial aid resources available to students.

*Moderator:* **TBD**

*Speakers:* **Gloria Falcon**, California Student Aid Commission

**Nati DeGroot**, California Student Aid Commission

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## Concurrent Interest Sessions – C

12:45 PM – 2:00 PM

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### Session C7

Salon G

#### Advanced PJ

Financial aid administrators have been given the authority through Professional Judgment to make case by case decisions regarding family circumstances. However many aid professionals hesitate to use professional judgment for fear that they may not do the right thing, their decision may not be upheld within the office, or that they're uncertain of the rules. Join this session to talk about the best practices in professional judgment and tackle some more complicated family circumstances such as bankruptcy, students supporting parents, cost of attendance adjustments and blended families. You'll leave this session confident to take on those complicated cases and make yourself a star in the office.

*Moderator:* **Margie Carrington**, CañadaCollege

*Speakers:* **Pat Hurley**, Assoc. Dean of Student Services, Glendale CC

**Maureen McRae**, Director of FA, Occidental College

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### Session C8

Salon H

#### Understanding Enrollment Reporting and Useful NSLDS Reports

Do you know the possible side effects of erroneous or non-reported enrollment changes? All schools are required to follow regulatory guidance that includes reporting timely and accurate enrollment information to the U.S. Department of Education. Enrollment reporting may not be one of your responsibilities on campus, but understanding the process may reduce its impact on your school's cohort default rate. Learn about the role of the Clearinghouse in this process. We will also explore how the various NSLDS reports may assist you in your default prevention efforts. Come join us to learn more about reducing default risk and minimizing technical defaults.

*Moderator:* **TBD**

*Speakers:* **Ruby Nieto**, ECMC

**Robert Haushalter**, National Student Clearinghouse

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### Session C9

Salon J

#### Yellow Ribbon Program

The Yellow Ribbon program allows IHL's to fund tuition and fee expenses that exceed amounts payable under the Post-9/11 GI Bill. This presentation will cover eligibility, requirements, considerations, and how to certify.

*Moderator:* **Kerri Helfrick**, Corinthian Colleges, Inc.

*Speakers:* **Shane Ferrebee**, San Diego Regional Veterans Affairs

**Robert Curry**, San Diego Regional Veterans Affairs

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### Session C10

Salon K

#### Creating a Training Program for Your Office – For Schools of all Different shapes & Sizes

Training is crucially important to the Financial Aid Office staff. Staff must follow complex regulations at the federal, state and institutional level. Keeping staff informed of new rules, or even old ones, ensures compliance, fewer audit findings, successful operations and excellent customer service. In this session, you will hear from two colleagues at very different types of schools and learn what they do on their campuses to train their staff.

Various approaches will be addressed, from staff training retreats to testing your staff on financial aid concepts and terms.

**Moderator:** **Melanie Saracco**, *Financial Aid Consultant*

**Speakers:** **Ron Day**, *NASFAA Chair*

**Kay Soltis**, *Pacific Lutheran University, WASFAA Past President*

## **Business Partner Solutions – C**

**12:45 PM – 2:00 PM**

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### **Session C11 – Business Partner Solutions**

*La Jolla*

#### **ECMC: ECMC and ECMC Solutions**

Join ECMC and our affiliate, ECMC Solutions, for an informative session highlighting ECMC's support of California students, our latest offerings in financial literacy, student loan counseling and default prevention tools and strategies for you and your students. Get ideas for incorporating our materials and webinars in your efforts; see a live demo of LoanTracker and more.

**Speakers:** **Jan Hines**, *ECMC*

**Dennis Zanchi**, *ECMC*

**Tommy Simms**, *ECMC Solutions*

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### **Session C12 – Business Partner Solutions**

*Los Angeles*

#### **College Board: A Better Way to Slice the Pie, College Board's CSS/PROFILE and Institutional Methodology (IM)**

As the availability of institutional funds becomes more limited due to budget cuts, a growing population of students is in need of financial assistance. As an institution, wouldn't you like to have a system to award aid built on principles of equity and fairness, and that uses a methodology that is rational and defensible? Join us for an overview of the CSS/PROFILE's Institutional Methodology (IM), the College Board's need-analysis system developed by financial aid practitioners to allocate need-based funds equitably. This session will discuss how IM differs from Federal Methodology (FM), and provide insights from current IM users and on how CSS/PROFILE helps them to meet their institutional goals.

**Speakers:** **Alicia Ortega**, *Educational Manager, Higher Education Services,*

*The College Board, Western Regional Office*

**Mary Booker**, *Director of Financial Aid, Pomona College*

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### **Session C13 – Business Partner Solutions**

*Newport Beach*

#### **Simple Tuition**

Discover how borrowers can qualify to have all or some of their student loan payments made by someone else. We'll help you understand these opportunities so you can help your students get out of debt faster. This session will discuss the Public Service Loan Forgiveness program, other loan repayment assistance programs, loan cancellation, and more.

**Speaker:** **Patrick Kandianis**, *Founder, EVP and Chief Sales Officer, Simple Tuition*

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**Break with Exhibitors****2:00 PM – 2:15 PM**Grand Ballrooms E and F

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## **Concurrent Interest Sessions – D** 2:15 PM – 3:30 PM

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**Session D1***Salon B*

### **Transitioning into a Clock Hour Program Environment – Part II**

This session is Part II of a two part session. In addition to basic clock hour concepts, this session will cover payment periods, TIV program calculations, SAP (including the new pace examples), R2T4 highlights and other considerations. This is a great session for those who are new to clock hour programs and would like to ask a federal trainer questions on the issue.

*Moderator:* **Melissa Moser**, Orange Coast College

*Speaker:* **Suzanne Scheldt**, U.S. Department of Education, Federal Student Aid

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**Session D2***Orange County 4*

### **FAFSA Application & Processing Update**

The session will provide an overview of the 2013-14 Free Application for Federal Student Aid and update of related application processing changes.

*Moderator:* **Melanie Saracco**, Financial Aid Consultant

*Speaker:* **Virginia Hagins**, U.S. Department of Education, Federal Student Aid

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**Session D3***Orange County 3*

### **Pell Grant Program Update**

This session will discuss recent changes to the Pell Grant Program and focuses on the new Pell Grant Lifetime Eligibility limits.

*Moderator:* **TBD**

*Speakers:* **Robert Vallas**, U.S. Department of Education, Federal Student Aid

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**Session D4***Salon A*

### **Satisfactory Academic Progress: Best Practices**

Assessment of a student's progression towards the completion of his or her academic program is a fundamental concept of Title IV. The changes made to the satisfactory academic progress regulations provided consistency in the assessment of satisfactory academic progress across the country. How has the blending of regulations, goals, and expectations of federal, state, and institution requirements worked? How can consumer information assist in notifying student populations of academic expectations? This session will provide a brief review of the regulations, discuss the impact of changes, and share best practices at an institutional level.

*Moderator:* **Laura Bouche**, BrightStar Education Group

*Speakers:* **David Tolman**, NASFAA

**Rhonda Mohr**, California Community Colleges Chancellor's Office

**Developing & Implementing a Financial Literacy Program**

The more a campus helps students understand debt and financial responsibility, the better the outcome for all parties involved. Find out about how to make a case for promoting financial literacy and where to look for partners on campus. Learn methods of delivery, student need identification, funding sources, evaluation techniques, and marketing ideas for launching a customized plan on your campus. Hear the details of current best practices of California schools. This session is sponsored by CLFE.

*Moderator:* **Kris Alban**, iGrad

*Speakers:* **Lynne Garcia**, Corinthian Colleges, Inc.

**Colleen MacDonald**, Simple Tuition

**Paul Mittlehammer**, Inceptia

**Dennis Zanchi**, ECMC

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**Tax Transcripts and Verification Requirements**

Take an in-depth look at the format of a Tax Return Transcript and other related IRS documents used in verifying FAFSA information. You will leave this session with tools to help you train office staff in processing Tax Return Transcripts and completing verification.

*Moderator:* **Brian Heinemann**, Cooper Mountain College

*Speaker:* **Cheryl Foster-Hunt**, USA Funds

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**The Dastardly 1098T Form – A Quick Insight from the Bursar Side of the House**

The 1098 what? 1098E? 1099? What exactly are “qualified educational expenses” anyway? Oh dear – come to this session to avoid the feeling of being Alice having fallen down the rabbit hole. This session will review the 1098T form and best practices at a high level to enable you to answer those commonly-asked questions you get between January and April of every year.

*Moderator:* **TBD**

*Speakers:* **Laurelle Swan**, ECSI

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**Collaborating with the Development Office**

Come to a panel discussion about coordinating and collaborating with your Development Office to maximize the limited endowed and restricted financial aid dollars. Share ideas on how these funds are awarded and coordinate with other forms of financial aid - is it stacked on top or part of other institutional funds. Tell us what has worked at your institution to get the most bang for your buck and to encourage future giving.

*Moderator:* **TBD**

*Speakers:* **Kay Soltis**, Pacific Lutheran University, WASFAA Past President

**Jack Edwards**, Stanford University, WASFAA President

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## **Concurrent Interest Sessions – D**

**2:15 PM – 3:30 PM**

Session D9

*Salon J*

### **College Completion Agenda – Latino Edition**

Last fall, the College Board released its College Completion Agenda: Latino Edition 2011. This compendium that includes a Progress Report, State Policy Guide, A Research and Context Brief and an interactive website aimed at providing the best data and policies for increasing college completion rates among this important demographic. The Latino Edition is based on the 10 recommendations issued in 2008 by the Commission on Access, Admissions and Success in Higher Education. State legislators, policymakers and educators play a large part in advancing each recommendation. Participants will explore the highlights of the 10 recommendations and will review Latino progress for each indicator. The session will also include some best practices and resources when working with undocumented students.

*Moderator:* **Robin Thompson**, Pitzer College

*Speaker:* **Alicia Ortega**, College Board

**Denise Pena**, Dominican University

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Session D10

*Salon K*

### **Loans 101: A Means to Achieving Post-Secondary Education**

This introductory session is intended for new financial aid administrators with little or no prior financial aid knowledge. You will learn the types of federal loans available to eligible students seeking a post secondary education. In addition, the importance of helping students perceive federal loans as an investment rather than a debt burden will be discussed. Although federal loans are the focus of this session, private alternative loans will also be mentioned.

*Moderator:* **Thalassa Naylor**, SallieMae

*Speaker:* **Gregorio Alcantar**, California State University Northridge

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## **Business Partner Solutions – D**

**2:15 PM – 3:30 PM**

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Session D11 – Business Partner Solutions

*Rancho Las Palmas*

### **ProEd Solutions: Outsourcing, Is it for you?**

Outsourcing various financial aid functions has become popular in recent years due to the overwhelming amount of responsibilities, rules and regulations financial aid professionals face. Cut backs on financial aid budgets and the ability to hire more staff comes at a time when workload has been increasing. The demand for increased student contact and quality customer service, both in person and on the phone, makes it almost impossible to get students' aid processed. Outsourcing can help alleviate some of this burden. This session will cover what functions are likely candidates for outsourcing. It will also discuss what to look for in companies providing this service, and what to avoid. In addition, the session will discuss opportunities for aid professionals for full or part-time work as a financial aid consultant.

*Speaker:* **Dr. Paul J. Gilroy**, ProEducation Solutions



**Great Lakes: Private Loans Fill a Need, We Make Processing Them Easier**

For many students, completing their college education would not be possible without private loans. However, changes in how loans are processed have made it more difficult for schools to guide students toward making smart decisions. Tools and personal service from Great Lakes can help.

Speakers: **Roger Eldridge**, Great Lakes  
**Heather Garcia**, Great Lakes  
**Sun Ow**, Great Lakes

**Discover: Learning to Listen**

The ability to effectively listen is a key component to a successful work and personal life. The ability to focus on others and the message they are attempting to deliver is vital to a productive exchange. Learning to Listen can help you by exploring “barriers” to effective listening and offers suggestions and tools to overcome these distractions. A quick survey is taken by each attendee and the results are examined and discussed during the session. Survey booklets will be available for the first 50 participants.

Speakers: **Callie Woods**, Relationship Manager, Discover  
**Cheryl Barnes**, Business Development Manager, Discover

**USA Funds: Building a Successful Default Prevention Plan**

A solid commitment to financial literacy and default prevention across your institution is key to promoting successful student loan repayment. Although default prevention plans will vary according to institutional goals, financial literacy education, regular contact with borrowers and support for at-risk students are among the best practices for successful default prevention. During this session, you’ll review the benefits of implementing a financial literacy education program, discover how to build an effective default prevention plan, learn helpful techniques for assisting your borrowers and hear about available tools and solutions that will assist your borrowers in successfully repaying their loans.

Speaker: **Dianne Fulmer**, Account Executive, USA Funds

Break with Exhibitors

**3:30 PM – 3:45 PM**  
Grand Ballrooms E and F



## **Concurrent Interest Sessions – E**

**3:45 PM – 5:00 PM**

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**Session E1***Salon J***Return of Title IV Funds – Basic Training for FAAs New to R2T4**

This session will cover the fundamentals of the Return to Title IV (R2T4) process. This is a high overview step by step approach to understanding the philosophy and “how to” approach of administering R2T4. This will be a great session for those administrators who are new to the process.

*Moderator:* **TBD**

*Speaker:* **Suzanne Scheldt**, U.S. Department of Education, Federal Student Aid

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**Session E2***Orange County 4***SAP 101 – A Whole New World – Rules & Further Guidance on an Old Topic** *(repeat)*

This session will define the components that make up a school’s Satisfactory Academic Progress policy, including repeated coursework, maximum timeframe, financial aid warning, financial aid probation, and academic plans. It will also describe a school’s options in setting up their SAP, and the mechanisms that will trigger different SAP statuses for students. Checking SAP for clock hour programs will be included.

*Moderator:* **Peggy Fiske**, Modesto Junior College

*Speaker:* **Robert Vallas**, U.S. Department of Education, Federal Student Aid

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**Session E3***Salon A***Perkins 101 – How DOES that Money Get Back into the Revolving Fund, Anyway?**

You’ve awarded the Perkins funds and your students are happy. What happens next? This session will explore at a high level the collections side of a Perkins Loan program, including the perils of moving from in-school to grace, due diligence, and some of those arcane regulations your colleagues struggle with. We will discuss issues such as commonly-used division of duties between Financial Aid and Student Accounts, how to choose a billing servicer, and other related topics

*Moderator:* **TBD**

*Speaker:* **Laurelle Swan**, ECSI

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**Session E4***Salon B***How to Leverage Social Media**

Come learn about the communication preferences of today’s college student. We will discuss how to successfully communicate with your students, along with how to do useful searches. We will take a closer look at Facebook, Twitter, and YouTube, with an eye toward how aid offices can use these forums to connect with and counsel students. Learn about ways to reach out to your existing students and also potential students which can help with your enrollment. A case study will be provided as a template to provide more insight.

*Moderator:* **Merilyn Sweet**

*Speakers:* **Jodi L. Miller**, Nelnet Partner Solutions

**California Dream Act**

Assembly Bills 540, 130, and 131, together they are the California Dream Act. A new student population will receive state student financial assistance. This session will outline the California Student Aid Commission's efforts in implementing a common Dream Act Application to supply student data to campuses.

*Moderator:* **Margie Carrington**, Cañada College

*Speakers:* **Bryan Dickason**, Manager Program Administration, CSAC

**Catalina Mistler**, Chief Program Administration & Services

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## Session E6

## Salon C

**Effective Communication: It's Not Always Easy**

Effective communication can seem easy for those of us that do it all day long-as easy as making a peanut butter and jelly sandwich, but often it is not easy, nor is it simple. With larger workloads, higher stress levels, and regulatory changes coming each year, effective communication is more important than ever, but often we devote even less energy, thought, and purpose toward it. This session will provide a brush up with some pointers and some candid discussion, as well as some humor!

*Moderator:* **Marcia Starcher**, Cal Poly Pomona

*Speaker:* **Kris Shear**, Santa Rosa Junior College

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## Session E7

## Salon G

**NASFAA Listening Sessions**

Members of the NASFAA's Reauthorization Task Force will conduct a listening session to gather information from the CASFAA Membership about topics that should be addressed in the next reauthorization of the Higher Education Act (HEA) scheduled for 2014. The Task Force will use the feedback from this and similar listening sessions conducted in 2012 to formulate recommendations for HEA reauthorization that will be presented in spring 2013 to NASFAA's Board of Directors for adoption to guide advocacy efforts when Congress takes up reauthorization.

*Moderator:* **Tim Bonnel**, California Community Colleges Chancellor's Office

*Speakers:* **Ron Day**, NASFAA Chair

**Pat Hurley**, Glendale CC

**Kay Soltis**, Pacific Lutheran University, WASFAA Past President

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## Session E8

## Salon H

**Navigating NCAA Division II Regulations in Financial Aid**

In this session we will review regulations and best practices for financial aid administrators working with NCAA Division II athletes. Some of the discussion will feature the period of the award, averaging, awarding initial offers, distinguishing between countable and exempt aid, and individual limits. Whether your school is a long standing, established NCAA Division II member or you're just beginning candidacy this is a great opportunity to share and brush up on tips when awarding athletes.

*Moderator:* **TBD**

*Speaker:* **Mollie Bohrer**, Cal Baptist

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## **Concurrent Interest Sessions – E**

**3:45 PM – 5:00 PM****Session E9***Salon K*

### **Federal Loan Servicer Panel Discussion**

This Session will be your opportunity to hear from a panel of Federal Loan Servicers. The panel will be asked to answer questions raised frequently from the financial aid community. The panel format will provide you with a comparison of processes, products and services. At the end of the session the audience will be given additional time to ask questions of the servicers.

*Moderator:* **Sun Ow**, *Great Lakes**Speakers:* **Jon Potter**, *NelNet***Bob Leary**, *Sallie Mae***Will Lindsey**, *PHEAA***Will Shaffner**, *MOHELA***Brett Lindquist**, *Great Lakes*

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**Session E10***Rancho Las Palmas*

### **How to Research a Question**

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 statutory, regulatory, and sub regulatory resources available. It also will provide tips for locating and using these types of resources.

*Moderator:* **TBD***Speakers:* **David Tolman**, *NASFAA***Ron Lee**, *USAF*

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**Session E11***La Jolla*

### **Graduate/Professional Best Practices**

This session will provide an opportunity for graduate and professional financial aid administrators to discuss a variety of topics and issues that affect graduate and professional students. This session will give folks an opportunity to talk about best practices that some institutions are implementing as well as guidance on how to update your current policies and procedures and provide the best resources to graduate and professional students.

*Moderator:* **Lily Marquez**, *Samuel Merritt University**Speakers:* **Jack Edwards**, *Stanford University, WASFAA President***Jamie Shrode**, *U.C. Berkeley, Hask School of Business***Dewayne Barnes**, *Stanford University School of Law*

# Business Partner Solutions – E

3:45 PM – 5:00 PM

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## Session E12 – Business Partner Solutions Los Angeles

### Inceptia: The Real Price of Student Loan Defaults

Student loan default isn't strictly a student issue, or a financial aid issue. It's a campus-wide issue that can soon become a nationwide issue. The price of the problem is simply too great to ignore. Learn how you can reverse the default outcome early through data analysis, effective financial education and communication strategies that put students, and your campus, on the right track for financial success.

Speaker: **Paul Mittelhammer**, *Inceptia*

## Session E13 – Business Partner Solutions Newport Beach

### First Marblehead: Private Loans – Everything you wanted to know but were afraid to ask!

Private student loans have changed considerably over the past several years – from both the point of view of the borrower and of the school. This session will give an overview of the evolution of private loans. As students are faced with difficult decisions on how to finance a college education we will look into trends in private loans today.

Speaker: **Kim Thomas**, *Relationship Manager, West Region, First Marblehead*

No-Host Cocktail Reception	<b>6:00 PM – 6:30 PM</b> Marquis Ballroom Foyer
Dinner and Dancing at the OzDust Ballroom	<b>6:30 PM – 11:30 PM</b> Marquis Ballroom

Tuesday, December 11, 2012

CASFAA Closing Breakfast and Annual Business Meeting	<b>8:00 AM – 9:00 AM</b> Marquis Ballroom
<b>Federal Update and Town Hall:</b> <b>Jeff Baker</b> , <i>US Department of Education</i>	<b>9:00 AM – 11:00 AM</b> Marquis Ballroom
Closing Remarks and Adjourn	<b>11:30 AM</b>

Safe Travels – See you in San Francisco in 2013!



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## Notes



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## Notes

