2020 CASFAA Conference Session Offerings

Draft

(Session titles and descriptions subject to change)

Trying to decide whether the upcoming CASFAA Conference is in the cards for you? Will it be worth it to attend? Will you get your training dollars' worth? Well, to help you decide, consider these sessions that are in the works and note that you don't have to choose 6 or 7 sessions, you can attend all 34!

From the US Department of Education –

- Federal Update
- Administering Adds, Drops and Withdrawals
- R2T4 - Programs Taught in Modules
- Administering Disbursements
- Pell and Campus-Based Programs Overview
- SULA: Misunderstandings and Misreporting

From the California Student Aid Commission

- CSAC Program Updates
- Cal Grant 101
- California Dream Act Application and California Nonresident Tuition Exemption (Commonly Known as AB 540)
- Cal Grant Delivery System Modernization Project (GDSM) Updates

Customer Service and Professional Development

- Living in the Moment with Mindfulness
- Customer Service in Financial Aid - It Only Takes Five Seconds to Make a First Impression!
- How to Make Better Presentations and Be a Better Presenter - Including During Times of Trouble
- Charting Your Financial Aid Career Path

Management, Leadership or Global Thinking

- Strengths-Based Leadership
- College Affordability in the Time of COVID
- NASFAA Update
- WASFAA Update/CASFAA Business Meeting

Financial Aid Best Practices

- Federal Update and PSLF Issues
- The Philosophy of Need Analysis
- Pros and Cons of Income Share Agreements
- 10 Common Questions Schools Have About Federal Program Reviews
- Hand-Calc Hoedown! An Introduction to Federal Needs Analysis and the EFC Formulas
- 2019 Tax Returns and the 2021-2022 Need Analysis – What's New?
- Income Adjustment Professional Judgments
- Head of Household Deep Dive

Student Loans and Financial Literacy

- Delivering Financial Literacy Presentations in a Virtual World
- Understanding Credit

Advocacy

- Out for Safe Financial Aid Services for Our LGBTQIA+ Students
- DACA: What's Next?
- Project Implicit
- Scholar Retention Program: Financial and Holistic Support for Dismissed Students

Trending Issues

- Hits and Misses From the Pandemic. What Worked for Student Support When Schools Went Remote This Spring?
- Don't Take the Bait - Simple Tips and Tricks to Protect Your Staff from Common Hacks & Scams

With Descriptions

From the US Department of Education –

Federal Update

- Join this session for the latest from ED. What's changed? What's going to change? What clarifications need to be shared? How will this all affect you and your students?

Administering Adds, Drops and Withdrawals

- This session will address the administration of Title IV funds when a student adds or drops courses as well as student withdrawals (excluding R2T4 calculation). Discussion and case scenarios will be provided concerning Recalculation Rules and Census Dates in various situations. Also, this session will provide an in-depth explanation concerning student withdrawals on such topics as Schools Required to Take Attendance vs. Schools Not Required to Take Attendance, Official and Unofficial Withdrawals, Dates of Determination and Deadlines, and an overview of Enrollment Reporting Requirements.

R2T4 - Programs Taught in Modules

- This session will focus on the Return of Title IV (R2T4) funds when a student withdraws from a program that is either taught within modules or has modules in the program.

Administering Disbursements

- In this session we will discuss various aspects of properly disbursing Title IV funds including Title IV credit balances, early and late disbursements, post-withdrawal disbursements, and retroactive disbursements. In addition, we will review G5 drawdowns, G5 and COD interactions, and timely and accurate system reporting. We will also provide information regarding how to disburse or return funds if improper payments occur or if a student regains eligibility.

Pell and Campus-Based Programs Overview

- Come and hear an overview of the provisions governing Federal Pell Grants and Campus-Based Programs. This session will include a discussion of unchanged rules, changed rules, policy examples and the operational aspects of these essential programs.

SULA: Misunderstandings and Misreporting

- The Subsidized Usage Limit Applies (SULA) concepts have been in play for several years now. What happens when the limit kicks in or when the limit is exceeded? What are the consequences for the borrower? What are the consequences for the school? What and how do you count and track eligibility usage? We'll be covering these important topics and more!

<u>From the California Student Aid Commission</u>

CSAC Program Updates

- Attendees will receive the latest updates on the various Commission administered programs, projects, and initiatives, including any recent legislative changes for state financial aid directly from CSAC's executive team. Attendees will also learn about the latest efforts from the Commission to continue supporting California students amidst the COVID-19 pandemic.

Cal Grant 101

- This session will provide an overview of the Cal Grant program including general eligibility requirements, Cal Grant award cycles (Entitlement vs. Competitive), Cal Grant types (A, B, C), as well as the Cal Grant award sequence (from application submission to awarding).

California Dream Act Application and AB 540

- Which financial aid application should your students complete? The answer to this question and many more, can be obtained by attending this session. Attendees will receive an overview of the 2021-22 California Dream Act application and main eligibility requirements – AB 540, AB 2000 and SB 68. We will also provide answers to common questions such as: are U.S. Visa holders eligible to complete the Dream Act Application (CADAA)? What is the Selective Service registration process for CADAA applicants? What if a What if a Dream Act student completes FAFSA in error?

Cal Grant Delivery System Modernization Project (GDSM) Updates

- This session will go over the latest timeline of implementation of the new WebGrants platform, main improvements for system functionality and a demo of some of the new WebGrants screens.

<u>Customer Service and Professional Development</u>

Living in the Moment with Mindfulness

- In this busy world, our minds are constantly pulled in multiple directions. We have overbooked calendars and compound deadlines that can leave us feeling tired and stressed. While you may not be able to change the volume of responsibilities you have, you can change how you approach each day so that you're living in the moment and generating energy—not expending it. Join Tasha McDaniel, Ascendium Senior Trainer and Certified Wellness Coach, to learn how to implement mindfulness strategies into your daily routine. Specific topics include - What mindfulness can do for you; Ways to incorporate mindfulness into your life; and How to create a mindful work environment.

Customer Service in Financial Aid - It Only Takes Five Seconds to Make a First Impression!

- Learn strategies to engage students providing superior customer service. Today's students have a choice. Competition among colleges and universities continues to escalate. The service provided by the financial aid office can significantly impact a student's satisfaction with the institution as a whole.

How to Make Better Presentations and Be a Better Presenter - Including During Times of Trouble

- Whether you're a seasoned presenter or someone new to public speaking, our session will cover a number of easy-to-implement tips to creating better presentations and being a better, more effective presenter. Even during these trying times, presentation skills are core to keeping your in-person or online audience tuned into your presentation.

Charting Your Financial Aid Career Path

- Ready to take the next step in your career? Not sure what your next step is? Feel like you are wandering around looking for your north star? Join in this interactive panel session with experienced colleagues who have worked in a diverse set of institutions—two-year, four-year, graduate, public and private—who can provide guidance on building your Financial Aid career path. You will come away with a game plan about what you want to do next!

<u>Management, Leadership or Global Thinking</u>

Strengths-Based Leadership

- Do you ever wonder why some members of your team just can't seem to get along? Or why your former all-star is now floundering after their new promotion? The odds are it has something to do with their individual strengths. Come learn the benefits of measuring and educating yourself and your staff on Gallup's Strengths, and maximize your ability to help your team succeed.

College Affordability in the Time of COVID

- College affordability challenges have long burdened low-income and underrepresented students, and the COVID-19 pandemic has only exacerbated their impacts. Please join this session to learn more about the college affordability landscape and steps policymakers, financial aid professionals, higher education advocates, students, and others can take to support vulnerable students' higher education success.

NASFAA Update

- Join us for an update from NASFAA President Justin Draeger. He'll cover the important and salient issues facing higher education financing in these challenging times as well as the positions that NASFAA takes.

WASFAA Update, CASFAA Business Meeting

- Join us for an update from WASFAA President Anthony Marrone. He'll cover the important and salient issues facing WASFAA as well as the latest WASFAA activities. This session will continue with CASFAA's annual business meeting, including the passage of the leadership torch to CASFAA's next wave of leaders. This session concludes the 2020 Conference.

<u>Financial Aid Best Practices</u>

Federal Update and PSLF Issues

- What's the latest on the Public Service Loan Forgiveness (PSLF) Program and what else might we expect for the remainder of 2020 and beyond? It's been a year like no other and despite the many challenges, we continue to work together and ensure our students have what they need. Attend this session for an overview and discussion on the latest PSLF news as well as a brief federal update focusing on the Graduate/Professional sector.

The Philosophy of Need Analysis

- This session will explore the guiding philosophy around financial need analysis and the various assessment methods built from this viewpoint. Participants will delve into the tradeoffs between accuracy and access, and whether more complicated financial aid formulas are chasing after a false sense of precision. How can financial aid formulas be simplified? What are the major flaws in need analysis methodologies? How can a family increase their eligibility for need-based financial aid? Does the financial aid application process discriminate against low-income students? Join this engaging conversation to learn more.

Pros and Cons of Income Share Agreements

- Are you tired of having no answer to the constant student and family question, "what else is there?" When scholarships have dried up and grants are maxed, there are more options than traditional loans. Find out how one school is making strategic use of Income Share Agreements to help students complete their degree.

10 Common Questions Schools Have About Federal Program Reviews

- The U.S. Department of Education (ED) performs program reviews to identify whether a school is abiding by the provisions governing Title IV aid programs, and if not, ED can impose hefty financial fines and liabilities against the school. This danger of financial ramifications may lead schools to fear program reviews, but you don't have to. Learn about the types of reviews, potential triggers for being selected for a review, the financial ramifications, and more.

Hand-Calc Hoedown! An Introduction to Federal Needs Analysis and the EFC Formulas

- Ever wonder what goes into calculating an EFC? Did you know there are several formulas behind that scenes that determine a family's ability to contribute. In this session, you will learn what makes up the EFC calculation, the formulas behind the math, and you will practice a hand calculation. Bring your calculator and prepare to have fun in this introduction to Federal Needs Analysis.

2019 Tax Returns and the 2021-2022 Need Analysis – What's New?

- You know from doing COVID-19 appeals that the 2019 tax forms a different from the 2018 tax forms. This session will review the new tax forms and the implications of the changes on verification, conflicting information, and financial aid equity. What do you need to review on the tax forms? What changes did the Department make, and what changes did the not make that they probably should have, in response to the changes? And are there new pain points for applicants in the 2021-2022 FAFSA process?

Income Adjustment Professional Judgments

- Our students and their families continue to experience high levels of economic uncertainty and rely on us to take their hardships into account through our appeals processes. How do you handle requests from students whose families have experienced a reduction in income? This session will explore the adjustments you may choose to make to the FAFSA data elements when a student's or student's family member's income has changed. The session will be numbers focused – looking at both how to construct an estimated income, and how to adjust other FAFSA data elements, like the Income Taxes Paid, that are derived from the AGI.

Head of Household Deep Dive

- No matter how many times you attend a training on filing status.... No matter how many times you read IRS Publication 17…. No matter how many times you post a question to FINAID-L…. There's always a new Head of Household wrinkle, a new Head of Household explanation, a new tax preparer insisting that a tax return has been filed correctly using the Head of Household status. This session will cover all the Head of Household angles – undocumented person vs. nonresident alien, temporary absences vs. non-temporary absences, two heads-of-household in the same home, etc., with examples designed to help you become confident in your understanding of this complicated tax issue.

Student Loans and Financial Literacy

Delivering Financial Literacy Presentations in a Virtual World

- As the world has gone virtual, delivering compelling content has become increasingly challenging. To keep audiences engaged and focused, we'll share tips for engagement and best practices for presentation materials.

Understanding Credit

- This presentation is focused on all things credit, and is geared towards developing an understanding of credit with a focus on student loans, auto loans and credit cards. We will highlight credit basics, FICO Scores and their importance, credit reports, credit monitoring, credit knowledge and financial health tips. The session will also help you understand the components of a credit report and how to read it and tips on what to do to correct errors on the report. It will help you counsel students on the importance of establishing and maintaining a strong credit score and help you understand your own credit score.

Advocacy

Out for Safe Financial Aid Services for Our LGBTQIA+ Students

- Interested in advancing your awareness and understanding of gender-diverse communities?   Cultural awareness includes our ever-expanding gender diverse populations. Learn how to shift with the new generation entering as students, advancing an inclusive culture in our FA Offices, sensitivity in processing gender diverse students, and more.

DACA: What's Next?

- What's Next After the Supreme Court Ruling? Join this session to hear some student voices for open questions in a roundtable discussion.

Project Implicit

- Implicit Bias. What is it? How can someone's race, sex, age, and other characteristics influence the way we see and treat them even when we are genuinely trying to be unbiased? What concrete steps can we take to help prevent this from happening?

Scholar Retention Program: Financial and Holistic Support for Dismissed Students

- This session will cover the UCSB Scholar Retention Program (SRP), which is designed to support academically dismissed students as they navigate their re-entry process. We will discuss program structure, building networks with campus colleagues and future goals that focus on financial wellness and holistic support of this population.

Trending Issues

Hits and Misses From the Pandemic. What Worked for Student Support When Schools Went Remote This Spring?

- Join an interactive roundtable discussion of financial aid leaders who will share their experiences as their institutions went remote this Spring. What worked? What was less effective? What was learned? What did students appreciate the most? The lessons from this past Spring will be invaluable as schools identify best practices to support students in 2020-2021 and beyond. Come to learn and contribute.

Don't Take the Bait - Simple Tips and Tricks to Protect Your Staff from Common Hacks & Scams

- In this session, we will explore common hacks and scams including phishing, social engineering, and use of social media to exploit your personal information. Even though many people are targeted at home or in your personal social media accounts, the information these social engineers receive can carry over to the workplace and impact your customers. Join us as we explore ways to protect yourself through this interactive session.