



**WASFAA Fall Conference Agenda
Chula Vista Resort
November 4-6, 2009**

It's a Jungle Out There.... Come join your safari guides and colleagues at the Fall 2009 WASFAA Conference as we navigate this complex journey toward the promise of simplification.

Wednesday, November 4, 2009

9:00 AM – 2:30 PM	Registration	<i>North Ballroom Entry</i>
9:00 AM – 11:30 AM	Executive Committee Meeting	<i>Meeting Room A/C</i>
11:30 AM – 12:30 PM	Committee Meetings Professional Development Membership Pre-collegiate	<i>Meeting Room B Santa Fe 3010 Meeting Room D</i>
11:30 AM – 4:00 PM	Exhibit Area Open	<i>North Ballroom</i>
12:30 PM – 2:15 PM	Welcome, Lunch, General Session Presenter: Matthew Berrafato, Elephant Hunting Moderator: Lynne Siewert, Senior Advisor, UW Madison	<i>North Ballroom</i>
<p>It's a Jungle Out There—How to Handle Being Overwhelmed and not Lose Your Focus and Life Balance. Join our keynote speaker in his role of "The Elephant Hunter" as he shares this unique and exciting concept, empowering people to identify their life's passion while charting a course to begin moving closer to a healthy life balance and the realization of their dreams.</p>		
2:15 PM – 2:30 PM	Break	<i>North Ballroom</i>

2:30 PM — 3:30 PM **Interest Sessions**

• **Elephant Hunter**

Meeting Room A

Presenter: Matthew Berrafato

Moderator: Kelly Vander Wyst, Student Loan Officer, AnchorBank

Join our luncheon presenter as he continues to show us ways to keep our focus and balance in our lives.

• **New Member Session**

Meeting Room B

Presenter: Heather Stein, Asst. Director, Milwaukee School of Engineering

Moderator: Mark Levine, Asst. Director, UW Milwaukee

Please join the membership committee in welcoming you or come refresh yourself with an overview of the organization. Come hear about the birth of WASFAA, our mission to our members and the community, future goals of the organization and potential involvement opportunities. We will introduce the different committees within WASFAA, their functions and how you can join their team. It's a great opportunity to meet the membership committee members and ask questions regarding how you can make a difference within WASFAA.

• **HEOA Checkup**

Meeting Room C

Presenters: Ben Dobner, Training Consultant, Great Lakes and

Wendy Hilvo, Asst. Director, Cardinal Stritch University

Moderator: Paul Baldrige, Sr. Customer Relations Specialist, Great Lakes

It's time to do an HEOA checkup! It has been a little over a year since the Higher Education Opportunity Act was signed into law, so let's take some time to ensure your campus is in compliance. Join WASFAA's Federal Issues Committee co-chairs as they walk you through the new disclosures and requirements that were required upon the signing of the act. They will also discuss some of the changes and requirements that HEOA requires as of July 1, 2010. You will leave the session knowing what is required of you and practical ideas on how to update your policies and procedures to ensure you are meeting the compliance requirements of this extensive piece of legislation

• **Private Loans**

Meeting Room D

Presenters: Jill Gosse, Senior Account Executive, Sallie Mae and

Sherry Nelson, Educational Lending Coordinator, UW Credit Union

Moderator: Lloyd Mueller, Exec. Director, Milwaukee Institute of Art & Design

Alternative/private student loans will be subject to recently passed Regulation Z requirements effective February 2010. Changes will affect both students and schools. Join members of WASFAA's Loan Concerns committee to learn more about how the entire loan cycle will change, including application process, disclosures, approval, certification, and disbursement.

3:30 PM — 4:00 PM

Break/Check In

4:00 PM — 5:30 PM	Sector Meetings	<ul style="list-style-type: none"> • Associate • Career Colleges/Proprietary • Private • Technical Colleges • UW System 	Meeting Room D Santa Fe 3010 Meeting Room C Meeting Room B Meeting Room A
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6:00 PM -- 7:30 PM	President's Reception	Grand Ballroom Lobby
<p>It's a jungle out there! Please join WASFAA President Steven Schuetz and the Fall Conference Committee for a mixer and swing through the jungle of veterans and monkey around with new members. Complimentary hors d'oeuvres will be served and a cash bar will be available. Test your knowledge and find out if you are "Smarter than a Veteran WASFAA Member" by participating in an optional trivia game."</p>		

8:00 PM – 11:00 PM	Game Room/Charity Fund Raising Activity	South Ballroom
<p>After dinner on your own, join new and veteran WASFAA members for an evening of games and 'networking' as we celebrate 10 years of WASFAA generosity and raise funds for the conference charity. We have adopted the same 'original' charity for this conference as the one selected in 1999. Central Wisconsin Community Action Council (CWCAC) is a non-profit agency that operates food pantries in Adams, Columbia, Dodge, Sauk and Waushara Counties. A non-perishable food donation is suggested. Cash bar available.</p>		
Guitar Hero / Rock Band / Wii Action Sports Board Games		South Ballroom South Ballroom

Thursday, November 5, 2009

6:45 AM – 7:15 AM	Morning Walkers	Meet in Lobby
7:30 AM – 8:30 AM	Breakfast	North Ballroom
7:30 AM – 10:30 AM	Final Conference Registration	North Ballroom Entry
8:00 AM – 3:30 PM	Exhibit/Raffle Areas Open	North Ballroom
8:15 AM – 8:30 AM	Leadership Graduation Ceremony	North Ballroom
<p>Presenter: Debbie Duff, Director, Mount Mary College and WASFAA Professional Development Committee co-chair</p>		
8:30 AM – 10:00 AM	General Session – Federal Update	North Ballroom
<p>Presenter: Jamie Malone, Training Officer, U.S. Department of Education Moderator: Sue Minzlaff, Assoc. Director, UW Milwaukee</p> <p>Always one of the most important and informative sessions at the conference, this session will provide up to date information on Department of Education activities and initiatives from a conference favorite.</p>		
10:00 AM – 10:15 AM	Break	North Ballroom

- **Creating an Inclusive Workplace**

Meeting Room A

Presenters: Terry Ruzicka, Special Assistant to the Vice Provost, UW Madison and Michelle Kelley, Assistant Registrar, Enrollment Services UW Madison
Moderator: Connie Hutchison, PhD., Executive Director, Higher Educational Aids Board

The Inclusivity Task Force in the Division of Enrollment Management (DEM) at the UW-Madison is working to create an increasingly inclusive, respectful organizational community by collaborating with individuals from throughout the division. This session will introduce the concept of inclusivity and the initiatives being launched in DEM to enhance workplace satisfaction and mutual respect. The session will also include an activity and discussion to help participants think about what inclusivity means and how to incorporate the philosophy and practice into day to day life. We hope this session sparks continuing conversations and perhaps new ways of thinking about how we interact with one another, listen to each other and contribute to a respectful community.

- **Need Analysis Using Federal Methodology**

Meeting Room B

Presenter: Triena Bodart, Asst. Director, UW Milwaukee
Moderator: Mike Huser, Counselor, UW Platteville

Have you ever wondered how the age of the parent affects the Estimated Family Contribution? Exactly how do the assets play into the formula? Whether you are a novice or an old hand, this session will provide a wealth of information – and perhaps a hand calc or two.

- **Professional Judgment: Crucial Tool to Help During Tough Times** **Meeting Room C**

Presenters: Ben Dobner, Training Consultant, Great Lakes, Lynne Siewert, Sr. Advisor, UW Madison, and Steve Midthun, Director, Milwaukee School of Engineering
Moderator: Liz Tucker, Director, UW Platteville

Today's economy is wreaking havoc on many families' finances. Professional judgment can be a crucial tool for providing financial assistance to students with special situations. You can help them get the aid they need in some cases by making adjustments to the elements that affect a student's Expected Family Contribution (EFC). With the help of case studies, you'll learn what actions are permissible, what type of documentation you should maintain to support your actions, and, finally, the importance of having a policy on professional judgment in place. THIS WILL BE REPEATED FRIDAY MORNING, ALTHOUGH PRESENTERS MAY CHANGE.

- **Networking 101**

Meeting Room D

Presenters: Amanda Wilson, Community & Campus Relations Coordinator, UW Credit Union and Nicole Charles with Keller Williams Realty
Moderator: Kelly Vander Wyst, Student Loan Officer, AnchorBank

Attend this professional development session to overcome your fear of networking and learn ways to make networking work for you. Whether you're networking to advance your career or just looking for ways to be more comfortable in a group of strangers, this session will provide you with useful tips to use in a variety of situations.

- **Preparing for an Audit**

Santa Fe 3010

Presenter: Michiale Schneider, Training Consultant, Great Lakes
Moderator: Jane Lemke, Account Exec., Wells Fargo, EFS

Do you feel stressed when it's time for your annual A133 audit? Would being selected for a program review cause you anxiety? This session will explain what you can do to be well-prepared and proactive, and limit your liability. We'll cover who's involved, where to start, what to expect, how to address deficiencies, and why it's important. You'll leave this session with a more organized approach and a thorough understanding of audits and program reviews.

11:15 AM – 12:15 PM

Interest Sessions

- **One on One with Jamie Malone**

Meeting Room A

Presenter: Jamie Malone, Training Officer, U.S. Department of Education
Moderator: Beatriz Contreas, Director, UW Oshkosh

Format – Q & A - Are there questions about Reauthorization for which you are still searching for answers? Here's your opportunity to receive answers to those questions as well as other questions you may have - ACG/SMART? Lender Lists? Get the answers directly from the Department of Education. If you like, you can just sit back and listen to the discussion.

- **Credit Card Use**

Meeting Room B

Presenter: Lisa Mitchell, President, Central Region, Sallie Mae
Moderators: Jill Gosse, Senior Account Executive, Sallie Mae

Are students at risk of overpaying for college due to increase in use of credit cards? Despite the credit freeze, college students last year used credit cards more than ever before, including charging tuition and other direct education expenses. This session will demonstrate the importance of educating college students about using credit effectively, weighing their spending decisions and considering their source of borrowing. The report, "How Undergraduate Students Use Credit Cards: Sallie Mae's National Study of Usage Rates and Trends, 2009," is the fifth in a series conducted since 1998 through the company's affiliate Nellie Mae which analyzes the credit card use of student loan applicants. Join us for an interactive dialogue on how parents, educators, and financial institutions can together take action to respond to college students' need for responsible credit options.

- **Direct Loan Insight**

Meeting Room C

Presenters: Sara Beth Holman, Director, Lawrence University; Tara O'Neil, Assoc. Director, Marquette University; and Julimar Rivera, University Services Associate, UW Whitewater
Moderator: JoAnn Moller, Financial Aid Specialist, Blackhawk Technical College

Considering a conversion to the Direct Loan Program? Let your Wisconsin colleagues who have experienced the program first-hand provide valuable information about their conversion to the Direct Loan Program, as well as their day-to-day experiences. They will fill you in on the "need to knows" and answer your many questions.

- **Using Technology for Policy & Procedure Manuals**

Santa Fe 3010

Presenter: Melissa Haberman, Compliance and Training Coordinator, UW Colleges
Moderator: Jacqueline Fairbairn, Director, Policy and Regulations Compliance, Great Lakes

This session will provide informative tips on the policy and procedure manual process from blank page to finished manual. Session attendees will receive guidance on how to get past the first stages of implementation, track the status of documents, and format an electronic manual. The use of technology is heavy in this session as offices are moving to paperless resources.

- **VA Education Benefits and the New Post 9/11 GI Bill**

Meeting Room D

Presenter: John Johnson, Education Liaison Rep., U. S. Department of Veterans
Moderator: Michelle Hermes, Assoc. Director, Ripon College

The presenter will describe the primary Veterans Affairs education GI Bill entitlement programs, the delivery process to students and institutions on benefit payments, and tuition direct payments to colleges and universities for those students. Also provided will be an overview of the flow of student applications, claims processing, payments of tuition and fees to institutions, and cause and effect on results of student veteran overpayments. Additional information will be presented which emphasize continued monitoring and reporting practices to ensure student veterans are receiving accurate benefits. Handouts will be provided.

12:30 PM – 1:30 PM

Lunch

North Ballroom

1:15 PM – 2:30 PM

Washington Update
Featured Speaker Brett Lief, President, NCHHELP
Moderator: Jo Woodward, Conference co-chair

North Ballroom

Brett Lief, President of the National Council of Higher Education Loan Programs (NCHHELP) will provide us with his thoughts on what is happening in Washington on student finance matters, with a focus on federal and alternative student loans. Brett will provide his views on whether current student aid policies are likely to continue and what students, families and schools might expect in the future.

2:30 PM – 3:00 PM

Break/Last Chance to Buy Raffle Tickets

North Ballroom

3:15 PM – 4:30 PM

Interest Sessions

- **One on One with Jamie Malone**

Meeting Room A

Jamie Malone, Training Officer, U.S. Department of Education
Moderator: Paul Baldrige, Sr. Customer Relations Specialist, Great Lakes

Format – Q & A - Are there questions about Reauthorization that you are still searching for answers to? Here's your opportunity to receive answers to those questions as well as other questions you may have - ACG/SMART? Lender Lists? Get the answers directly from the Department of Education. If you like, you can just sit back and listen to the discussion.

- **Opening Doors to College for Foster Youth**

Santa Fe 3010

Presenter: Christine Lenske, Independent Living Coordinator, Wis. Dept. of Children and Families

Moderator: Lynn Becker, Advisor, UW Milwaukee

Children in foster care face greater educational challenges than their peers who were not placed in foster care. A statewide group of public, private and technical college staff have joined with secondary school educators and social services staff to connect with and open doors to higher education for these youth. Financial aid officers can play a significant role in helping these youth pursue postsecondary education by understanding the barriers and how to connect these youth to scholarships, targeted financial aid information, forms and additional resources (health care, housing, support, etc). This advisory group provides training related to foster youth topics that are connected to the Higher Education Opportunity Act, scholarship opportunities and recommended strategies to ensure Wisconsin's commitment in serving these youth beyond the federal expectations.

- **How America Pays for College**

Meeting Room B

Presenter: Lisa Mitchell, President, Central Region, Sallie Mae

Moderator: Kristi Cellitti, Advisor, UW Milwaukee

In this year of unprecedented economic turbulence, with the cost of college still increasing, families achieved their dream of sending their children to college. *How?* This session will focus on how families in AY 2008-2009 met the expense of college. Data important to financial aid, admissions and other offices across your campus will be reviewed. The timely results of Sallie Mae's annual study, "How America Pays for College," conducted by Gallup will highlight differences from 2007-08 including in the ways parents contribute, how students borrow, and any impacts the cost of attendance has had on school selection.

- **Customer Service in Turbulent Times**

Meeting Room C

Presenters: Karla Weber, Advisor, UW Madison and

Keyimani Alford, Asst. Director, UW Milwaukee

Moderator: Ruth Schulze, Sr. Student Services Coordinator, UW Milwaukee

It's been a rough year for everyone and as financial aid administrators, we've heard it all. But how do you respond to families that are dealing with job/business loss, foreclosure, and in some cases bankruptcy? This session will focus on modifying and improving your customer service skills to deal with these types of situations.

- **Study Abroad**

Meeting Room D

Presenters: Heidi Johnson, Sr. Advisor, UW Madison and

Coral Taylor, Counselor, Marquette University

Moderator: Anna Kerns, Advisor, UW Madison

Join us for a panel discussion on financial aid for your study abroad population. We will discuss student advising for study abroad participants. We will also cover financial aid options for study abroad; awarding and disbursing of financial aid and working collaboratively with the study abroad office on your campus.

5:45 PM

Dinner and Evening Activity
Busses depart for Chalet Lanes Bowling Alley

Join your WASFAA colleagues for a night of fun and networking. Back by popular demand is dinner in a basket with a night of bowling and karaoke. Last bus returns to Chula Vista at 11:30.

Friday, November 6, 2009

6:45 AM – 7:30 AM

Morning Walkers

Meet in Lobby

8:30 AM – 9:30 AM

Interest Sessions

- **Professional Judgment: Crucial Tool to Help During Tough Times** ***Meeting Room A***

Presenters: Ben Dobner, Training Consultant, Great Lakes, Lynne Siewert, Sr. Advisor, UW Madison, and Steve Midthun, Director, Milwaukee School of Engineering
Moderator: Heidi Johnson, Advisor, UW Madison

Today's economy is wreaking havoc on many families' finances. Professional judgment can be a crucial tool for providing financial assistance to students with special situations. You can help them get the aid they need in some cases by making adjustments to the elements that affect a student's Expected Family Contribution (EFC). With the help of case studies, you'll learn what actions are permissible, what type of documentation you should maintain to support your actions, and, finally, the importance of having a policy on professional judgment in place. (THIS IS A REPEAT FROM THURSDAY MORNING—ALTHOUGH PANEL MAY NOT BE THE SAME.)

- **Loan Repayment**

Meeting Room C

Presenter: Roger Eldridge, Vice President Marketing Midwest, Great Lakes
Moderator: Debbie Murphy, Sr. Marketing Associate, Great Lakes

Wonder what happens when your students leave school and enter repayment on their student loans? This session will help you guide your students to the successful repayment their student loans. Learn about the repayment period: repayment plan options within FFEL and FDL, deferment/forbearance, and consolidation. We will also highlight best practices for tracking down loans/Service providers amidst the current TIV lending environment in FFEL, Put, and FDL.

- **Year Round Pell Grant**

Meeting Room B/D

Presenter: Jamie Malone, Training Officer, U.S. Department of Education
Moderator: Karla Weber, Advisor, UW Madison

With the advent of the new year-round Federal Pell Grant, this session will focus on eligibility requirements and the calculation of the Pell award during Summer Sessions.

9:45 AM – 10:45 AM

Brunch
(Checkout is 10:30am)

North Hall Ballroom

10:15 AM – 11:30 AM **Business Meeting—Steve Schuetz, WASFAA President** *North Hall Ballroom*
Charity Presentation—Mary Jo Green, Supervisor, Mid-State Technical College
HEAB Update—Connie Hutchison, PhD., Executive Secretary
College Access Challenge Grants Update—Amy Kerwin, Chief Guaranty Officer, Great Lakes

11:30 AM – 12:30 PM **Transitioning to Direct Lending** *North Hall Ballroom*

Presenters: Roberta Johnson, Director, Iowa State University, DL Coalition Past Chair, and Wood Mason, Lead of the FSA OnBoarding Team and member of the FSA Direct Loan Transition Team

This session will provide important information for schools that are converting (or are considering converting) from the FFEL Program to the Direct Loan Program. The session will include a discussion of the responsibilities of a school that participates in the Direct Loan Program, the steps required for the conversion, as well as an overview of the processes and procedures used by Direct Lending schools in their interface with the Department.

12:30 PM **Closing – WASFAA President Steve Schuetz, VP of Admissions and Financial Aid, Ripon College**

Safe Travels. See you at the Spring Conference, April 21-23, 2010 at the Blue Harbor Resort in Sheboygan! Don't forget to complete your conference evaluations online when you get home.

2009 Fall Conference Planning Committee:

Sue Minzlaff and Jo Woodard, co-chairs

Kristi Cellitti

Jill (Nett) Gosse

Mary Jo Green

Michelle Hermes

Heidi Johnson

Debbie Murphy

Sherry Nelson

Lynne Siewert

Liz Tucker

Kelly Vander Wyst

Karla Weber

Dave Woodward