



WASFAA Spring Conference

Shore up your Knowledge

April 21-23, 2010

Wednesday, April 21, 2010

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|-------------------|---|--|---|---|--|---|--|
| 9:30am - 3:00pm | Registration | | | | | | |
| 10:30am- 12:00pm | Executive Committee Meeting (Island Room) | | | | | | |
| 12:30pm - 2:30pm | Lunch Introduction to Charity (<i>The Red Shield Free Clinic</i>) Introduction of guests - MASFAA update by James Brooks, MASFAA President State Update by Connie Hutchison, HEAB Federal Update by Angela Smith, FSA/ED (Salon A) | | | | | | |
| 2:30 pm - 3:30 pm | Exhibits Open (Lakeside Terrace) | Direct Loan Transition Angela Smith, FSA/ED (Salon A) | Collaborating to Provide Meaningful Work Study Positions in the Community Sara Beth Holman, Lawrence University (Salon D) | New Member Session Vicki Gack, Ripon College (Salon E) | Loan Forgiveness & Discharge Nancy Masten & Lori Yaun, GLHEC (Salon F) | Sailing Smoothly through Database Matches & Conflicting Information Ben Dobner, GLHEC (Salon G) | |
| 3:30pm - 4:00pm | | Break/Check -In | | | | | |
| 4:00pm - 5:30pm | | User Group Various Systems (Salon B) | User Group PowerFAIDS Vatistas Vatistas, Carthage College (Salon D) | User Group Banner Jessica Rafeld, Lawrence University (Salon E) | User Group PeopleSoft Anne Podgorak, UW Superior (Salon F) | User Group Datatel Vicky Somers, Alverno College (Salon G) | |
| 5:30pm - 8:30pm | Dinner Individually | | | | | | |
| 8:30pm -10:00pm | President's Dessert Reception (Lakeside Terrace) | | | | | | |

Thursday, April 22, 2010

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|--------------------|---|---|--|---|---|---|--|
| 8:00 am - 11:00 am | Registration | | | | | | |
| 8:00 am - 9:00 am | Breakfast (Salon A) | | | | | | |
| 8:30am- 9:30am | FFELP Wind Down Updates Lenders (Salon A) | | | | | | |
| 9:30am - 10:30am | GAP Analysis Presentation WASFAA Adhoc GAP Analysis Committee (Salon A) | | | | | | |
| 10:30am-10:45am | Exhibits Open (Lakeside Terrace) | Break | | | | | |
| 10:45am - 12:00pm | | One-On-One with Angela Smith, FSA/ED (Salon B) | Where are My Loans? Michelle Hermes, Ripon College (Salon C) | Customer Service- Learning to Listen Judy Deuster, Discover Loans (Salon D) | State/Federal GI Benefits update Jim Schmidt, UWM (Salon E) | Wading your Way Through Verification Susan Neppel, GLHEC (Salon F) | Federal Student Aid Reform: Will it Change Behavior? Anne Sturtevant (Salon G) |

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|------------------|---|---|--|---|--|---|--|
| 12:00pm - 1:30pm | <p style="text-align: center;">Lunch <i>Improving College Access and Success through Federal Student Aid Reform</i> Anne Sturtevant, Director, Enrollment Services & Access Initiatives, College Board Student Success Barry Polster, Lakeland Student (Salon A)</p> | | | | | | |
| 1:30pm - 1:45pm | Break | | | | | | |
| 1:45pm - 3:00pm | Exhibits Open (Lakeside Terrace) | One-On-One with Angela Smith, FSA/ED (Salon E) | IB What? Helping Students Wade Through the Waters of IBR Nancy Masten and Ben Dobner, GLHEC (Salon B) | Ebbing the Flow: Responding to Rising Tide of Defaults Amy Kerwin and Susan Neppel, GLHEC (Salon C) | WI GI Bill and Supplemental Payments Adam Pfost Jill Bangart UW Colleges (Salon D) | Preferred Lender Arrangements and HEOA Bill Henderson Jill Gosse Sherry Nelson WASFAA Loan Concerns (Salon G) | What is WEOP? Sharon Hunter and Mike Prasher, DPI-WEOP (Salon F) |
| 3:00pm - 3:30pm | | Break Last chance to buy raffle tickets! | | | | | |
| 3:30pm - 5:00pm | Sector Meeting Associate Members (Salon F) | Sector Meeting Career Colleges/Proprietary (Salon B) | Sector Meeting Private Colleges (Salon C) | Sector Meeting Technical Colleges (Salon D) | Sector Meeting UW System (Salon G) | | |
| 5:00pm - 6:00pm | | | | | | | |
| 6:00pm - 9:00pm | Dinner and Awards Banquet (Salon A) | | | | | | |

Friday, April 23, 2010

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|-------------------|--|---|---|--|---|
| 8:00 am-9:00am | Committee Meeting <i>Outreach and Early Awareness</i> (Salon B) | Committee Meeting <i>Pre-Collegiate</i> (Salon D) | <i>This session starts at 8am</i> <i>Preparing an Audit Ready FISAP</i> Marilyn Krump and Laurie Grigg, UW Colleges (Salon E) | Committee Meeting <i>Loan Concerns</i> (Salon F) | Committee Meeting <i>Fall Conference Committee</i> (Salon G) |
| 9:00am - 10:15am | Making the Wisconsin Access Challenge Grant Work for You Jill Hassenfelt Maria Bundy (Salon B) | Federal Policy Making – Regs 101 Nancy Masten, GLHEC (Salon D) | | Year Round Pell Angela Smith, FSA/ED (Salon F) | Federal Loan Servicing Roger Eldridge Brett Lindquist GLHEC (Salon G) |
| 10:15am - 10:30am | Break | | | | |
| 10:30am - 12:00pm | <p style="text-align: center;">Brunch <i>Role of the Inspector General and Current Investigative Trends</i> David T Skonieczny, Assistant Special Agent in Charge, US DOE Dan Pavlokovic, Special Agent, US DOE</p> <p style="text-align: center;">Business Meeting (Salon A)</p> | | | | |
| 12:00pm - 1:30pm | WAICU Meeting (Salon D) | | | | |

Please watch for an e-mail with a link to complete evaluations for the conference and interest sessions.



**2010 WASFAA Spring Conference
April 21st - 23rd 2010
Blue Harbor Resort
Sheboygan Wisconsin**

Day 1 General Session

Red Shield Free Clinic (Salvation Army) - Overview of Charity Organization

**Introduction of MASFAA President, James Brooks and MASFAP President, Jason Crowe.
MASFAA update** - James Brooks, Director of Financial Aid, University of Missouri

Federal Update

Angela Smith, Training Officer, FSA/ED

State Update

Connie Hutchison, PhD., Executive Secretary.

Day 2 General Session Morning

GAP Analysis.

Steve Schuetz, VP of Admissions, Financial Aid, Marketing and Communications, Ripon College
Maria Bundy, Director, College Access Advising, Great Lakes Higher Education Guaranty Corporation

Description: With the shared goal of improving the lives of youth and adults in Wisconsin through education, a group of individuals from across the WASFAA spectrum got together to develop a survey to get a better picture of what college access looks like in our state. Our hope is that the information collected in the survey will result in improved coordination of efforts and resources among the many and varied programs that are committed to helping individuals access higher education within Wisconsin. In this session we will discuss how the survey process worked, share our preliminary results and talk about the next steps. Ultimately, we all share the same goal of providing the best services possible to students and families to assist them in achieving their goal of higher education and a brighter future.

Day 2 General Session Afternoon

Improving College Access and Success through Federal Student Aid Reform.

Anne Sturtevant, Director, Enrollment Services & Access Initiatives, College Board

Description: Many have argued that the federal student aid system needs to be simpler. The Rethinking Student Aid Study Group, tasked with designing a clear, predictable, and student-focused federal aid system, issued policy recommendations intended to close the gaps in college enrollment and graduation rates between students from low-income backgrounds and those from more affluent circumstances. This overview will cover current and proposed changes in the federal system, including a shortened FAFSA and fewer data elements available to determine who receives need-based institutional and state grants. Hear the latest developments and potential implications for institutions as they attempt to steward the distribution of their resources in parallel with a remodeled federal process.

Student Success.

Barry Polster, Lakeland College Undergraduate/Graduate Student

Description: Mr. Polster will share his college journey, including the various diversions that could have steered him away from completing his degree. The presentation will also cover the various forms of aid that were extended to him.

Day 3 General Session

Role of the Inspector General and Current Investigative Trends.

David T. Skonieczny, Assistant Special Agent in Charge, US DOE
Dan Pavlovic, Special Agent, US DOE

Description: This presentation will provide a brief overview of the creation of the U.S. Department of Education's Office of Inspector General's Investigative Division (ED/OIG/IS) and its mission and performance objectives. The history of The Inspector General Act will be explored and the important role it played in the creation of ED/OIG/IS. The current ED/OIG Organizational Structure will be discussed as well as each of its components: Investigations, Audit, Inspection and the Hotline Complaint System.

The second half of the presentation will focus on the Investigative Services and the authority ED/OIG have to perform their function within our agency. The discussion will include current investigative trends, specific case examples and ways financial aid professionals can identify fraudulent activity to make a referral to our agency.

Breakout Sessions

Direct Loan Transition.

Angela Smith, Training Officer

Institution: FSA/ED

Description: This session will focus on three words: “preparation, NOT obligation” specifically, what will you do to prepare now that legislation passed enacting 100% Direct Loan participation. This session will introduce concepts, terminology, and other information needed to understand how the program works and how to manage and administer the program at a school.

Collaborating to Provide Meaningful Work Study Positions in the Community.

Sara Beth Homan, Director of Financial Aid

Institution: Lawrence University

Description: Financial Aid/Student Employment, Volunteer Centers, Career Centers, Student and Off Campus Programs are all interested in helping students have meaningful learning experiences beyond the college campus. This common goal provides a great opportunity for collaboration which is essential during challenging economic times. In this session, we will explore how the financial aid and student employment offices can collaborate with other on-campus offices to provide learning experiences, enhance the community service component of the federal work study program, create and improve relationships in the community, and provide additional financial aid to students through an educational award.

I Joined WASFAA. Now What?

Vicki Gack, Financial Aid Counselor

Donna Dahlvang, Director of Financial Aid

Institution: Ripon College
UW Superior

Description: Please join the membership committee in welcoming you or come refresh yourself with an overview of the WASFAA 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 with 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 with WASFAA.

Loan Forgiveness and Discharge.

Nancy Masten, Policy Supervisor

Lori Yaun, Policy Analyst

Institution: Great Lakes Higher Education Guaranty Corporation

Description: There are a variety of loan forgiveness and discharge programs that are often out-of-sight, out-of-mind when financial aid is discussed. Come to this session to weed through the details and

become familiar with what's offered at the federal level, which will help you in counseling your students.

Sailing Smoothly through Database Matches and Conflicting Information.

Ben Dobner, Training Specialist

Institution: Great Lakes Higher Education Guaranty Corporation

Description: Ever wonder what happens to all of the data a student enters on the FAFSA? This session will describe the various database matches an applicant's data sails through as well as what corrective actions you must take when ISIR comes through rejected or with a comment code. We will also discuss how to wade through the murky waters of conflicting information. You will leave this session with a better understanding of what conflicting information is and what actions are required when you receive it.

One-On-One with Angela Smith.

Angela Smith, Training Officer

Institution: FSA/ED

Description: Here's an opportunity to come in and ask a question OR just come and listen to others.

Where are My Loans?

Michelle Hermes, Associate Director of Financial Aid

Institution: Ripon College

Description: After years of telling students to borrow from the same lender to simplify repayment and avoid defaulting, students are suddenly faced with multiple servicers when they enter repayment. I would like to take this opportunity to discuss how we as financial aid counselors explain to students who is servicing their loans. What resources can we give to students to help prepare them for the repayment process?

Learning to Listen.

Judy Deuster, Educational Loans Relationship Manager

Institution: Discover Student Loans

Description: Increase your level of listening efficiency to ensure clear communications that drive exemplary performance and engaging relationships. Identify barriers that hinder effective listening. Create a plan to improve your listening effectiveness.

State/Federal GI Benefits Update.

James Schmidt,

Institution: University of Wisconsin, Milwaukee

Description: Get the latest news, updates, and trends relating to the most popular and not so popular military education benefit programs available to veterans and their dependents from state and federal sources.

Wading your Way Through Verification with Both Oars in the Water.

Susan Nepl, School Trainer

Institution: Great Lakes Higher Education Guaranty Corporation

Description: The Department of Education requires you to verify a large segment of your financial aid applicant pool. Do you know how to steer your way through the verification process? We'll provide you with an in-depth understanding of current Department of Education requirements and show you how to review each process so that you avoid the shallows and don't get stuck in the weeds. Participants will be able to better understand the principles of verification to include knowing when verification is required, what data elements must be verified, and how to resolve and document your findings in accordance with prescribed Title IV deadlines.

Financial Aid Reform: Will it Change Behavior?

Anne Sturtevant, Director, Enrollment Services & Access Initiatives

Institution: College Board

Description: The College Board's Rethinking Student Aid study group recommended far-reaching changes to the federal student aid system based on a set of common principles and informed by existing research. But what do students and parents think about these proposals? If implemented, would they make a difference in students' academic preparation, in their choice of colleges, in their ability to progress and succeed academically? This session will share the results of a comprehensive research project completed in fall 2009 to understand underrepresented students' and parents' perspectives about the Rethinking Student Aid study group's recommendations. Which recommendations do they think are most important? Which recommendations are they worried about? Would these changes have influenced their behaviors around preparing for, applying for and paying for college?

IB What? Helping students Wade Through the Waters of IBR.

Nancy Masten, Policy Supervisor
Ben Dobner, Training Consultant

Institution: Great Lakes Higher Education Guaranty Corporation

Description: Income-Based Repayment (IBR) offers students fair and manageable payments but also creates new terms to understand and procedures to follow. Don't let your students be wept away by the undertow! This session will provide all of the information you need to understand IBR. You will also obtain information on how to effectively communicate to your students how IBR works so that they are equipped with the knowledge they need to make informed repayment decisions.

Ebbing the Flow: Responding to the Rising Tide of Defaults.

Amy Kerwin, Chief Guaranty Officer
Susan Neppl, School Trainer

Institution: Great Lakes Higher Education Guaranty Corporation

Description: Help your borrowers stay afloat and reach the shore to successful repayment. Borrowers often feel they are swimming in murky waters when it comes to student loan repayment. They feel they are drowning in debt and are uncertain where the tides will take them. In this session you will learn how to reframe your default prevention activities to impact borrowers long before they go adrift. We will provide you with the information and tools you need to develop an innovative and tailored approach to default prevention that helps borrowers avoid delinquency and stay on a course to successful repayment.

WI GI Bill and Supplemental Payments.

Adam Pfost, Policy Analyst
Jill Bangart, Financial Aid Coordinator

Institution: University of Wisconsin Colleges

Description: The changes to the Wisconsin GI Bill that went into effect in Fall 2009 created new administrative challenges for University of Wisconsin and Wisconsin Technical College institutions. The creation of a supplemental payment required new interoffice processes and communication. This session will provide a brief overview of the supplemental payment and an opportunity for financial aid officers to dialogue about the process.

Preferred Lender Arrangements and HEOA.

Jill Gosse
Bill Henderson
Sherry Nelson

Institution: WASFAA Loan Concerns Committee

Description: The WASFAA Loan Concerns Committee will provide a basic outline of how the private loan process is affected by HEOA. Should your office have a Preferred Lender Agreement (PLA)? Come and learn your options and why you may chose to or chose not to have a PLA.

What is WEOP?

Sharon Hunter WEOP Supervisor
Mike Prashner Education Specialist

Institution: DPI- WEOP

Description: Come learn about the services that WEOP provides through a variety of early awareness programs that target 6-12th grade students, schools targeted for programs, as well as services for adults and the TIP award process.

Making the Wisconsin Access Grant Work for You.

Jill Hassenfelt, College Access Advising Supervisor
Maria Bundy, Director, College Access Advising

Institution: Great Lakes Higher Education Guaranty Corporation

Description: The goal of the College Access Challenge Grant is to help students and their families plan, prepare, and understand the options to pay for college. Attend this session to meet some of the College Access Advisors, see pieces of their presentations, and discuss how they can work with you.

Federal Policymaking—Regs 101.

Nancy Masten, Policy Supervisor

Institution: Great Lakes Higher Education Guaranty Corporation

Description: This session will give you a crash course on how we get from the “idea” to “regulation” by reviewing the federal policymaking process. We will also discuss negotiated rulemaking and review the

formal protocols and procedures, deliberations, and what it means to reach a consensus. You'll come away with a good understanding of how the Department of Education and the financial aid community work together to develop regulations, and resources you can use to understand them.

Preparing an Audit-Ready FISAP.

Marilyn Krump, Director, Student Financial Aid
Laurie Grigg, Controller

Institution: University of Wisconsin Colleges

Description: This session will take participants through each section of the FISAP and provide samples of supporting documents that will make your audits far less painful for you and the auditors. We will demonstrate how to use Excel Pivot tables as a time-saving tool. The session will also emphasize the benefits of a good, on-going working relationship between the business office and the financial aid office. This session is designed for Business Office and Financial Aid personnel who are responsible for completing the FISAP or for those who simply find satisfaction in completing this type of project.

Year Round Pell.

Angela Smith, Training Officer

Institution: FSA/ED

Description: The HEOA authorized schools to disburse up to two Pell Grants in a single award year beginning with the 2009-2010 year. Final regulations related to this were published in the Federal Register on October 29, 2009. This session will focus on issues related to processing Year-Round Pell and discuss sample scenarios.

Federal Loan Servicing.

Roger Eldridge, Vice President of Marketing, Midwest

Institution: Great Lakes Higher Education Guaranty Corporation

Description: Interested in getting the latest on Federal Loan Servicing? This session provides an update on Federal Loan Servicing past, present and future. Learn more about the servicing of the federally owned PUT Loans. We will also review the latest from Washington on pending student loan reform legislation.