



2019 Annual OASFAA Conference Program

Wednesday, February 6th, 2019

Newcomer Welcome Session - Gallery

11:00 am - 11:55 am

Jess Kelly, Assistant Director Of Financial Aid at Reed College
Debbie O'Dea, Financial Aid Counselor at Southern Oregon University

If this is your first OASFAA Conference, welcome! Please join us to learn more about the conference you're attending, the organization you're apart of, and make connections with some seasoned OASFAA Members

Presidents Welcome and Luncheon - Long House

12:00 pm - 1:00 pm

Building a Connection to Diversity, Equity and Inclusion - Long House

1:00 pm - 2:00 pm

Hanif Fazal, CEO and Co-Founder at Center for Equity and Inclusion

Conversations about diversity, equity, and inclusion are taking place in classrooms, campuses and throughout our communities in a myriad of ways. Join Hanif Fazal as he invites OASFAA attendees to learn about DEI principles, the impact that a commitment to equity can have on the students we serve and the ripple effect this work can have for individuals and communities alike. Hanif will take participants on a personal and professional journey in which equity and inclusion has been an essential component; so that participants can build a personal, cultural and institutional understanding of DEI.

Intersession Break & Visit with Corporate Partners - Council House

2:00 pm - 2:15 pm

Take a break and visit with the Corporate Partners!

Breakout Session #1

2:15 pm - 3:05 pm

OSAC Update for 2019 - Cedar Tree

Susan Degen, HECC Office of Student Access and Completion

OSAC Update of key agency programs as well as agency proposals for new/expanded programs and legislation for the 2019 session.

OnBoarding: Prepare Your New Employee for Success - Gallery

Ashley Munro, Associate Director of Financial Aid at University of Alaska Fairbanks

Filling a vacant position in the financial aid office is not an end point- it's just the beginning. It can take a full cycle for a new employee to feel comfortable in the position. This session will explore tips for managers to make new employees feel welcome and prepared to tackle their responsibilities. We'll discuss our experiences as new financial aid employees and review some thoughts of new staff in offices across the university to find out what keeps a new employee engaged and what gets them ready to flee.

The ABC's of Gen Z: Adapting Financial Aid Practices for Effective Outcomes - Pine

Mike Lubben, Senior Vice President of Business Development at Inceptia

Gen Z, the next generation of students, is more tech savvy and digitally driven than its predecessors - an area in which many campus departments are still getting up to speed. Learning their language and finding the right balance of electronic and interpersonal interaction will present challenges as FAOs adapt to these bright young minds; this session will help you prepare for that. Through research, and best practices from the University of Illinois, this session covers, understanding the Gen Z mindset, communication and engagement strategies, and tips from the University of Illinois to easily meet Gen Z where they are.

Students and Credit: Consumer Credit Management - Lincoln

Ciel Senechal, Campus Development - West Region at College Ave Student Loans

Did you know that 83 percent of students with only student loans on their credit file are in deferment? Or that late payments and collection accounts can remain on a credit report for up to 7 years? In this session, attendees will learn what the average student's credit profile looks like, what students need to know about credit, and how to help students build their credit history. We will also discuss hot topics including fraud, data breaches, and credit protection, and will provide attendees with valuable tips, tools, and resources to help students and families.

College Planning - Sitka

Raymond Yee, Director of Sales at Sallie Mae

Insights into the college financial planning process that come from the How America Pays for College 2017 study are included in this session and how those findings relate to college planning, the value of planning for how to pay for college vs. not planning. The session will also walk you through the 1-2-3 approach to paying for college.

Intersession Break & Visit with Corporate Partners - Council House

3:05 pm - 3:30 pm

Take a break, grab a snack, and visit with the Corporate Partners!

Breakout Session #2

3:30 pm - 4:20 pm

OSAC Update for 2019 - Cedar Tree

Susan Degen, HECC Office of Student Access and Completion

OSAC Update of key agency programs as well as agency proposals for new/expanded programs and legislation for the 2019 session.

Internal and External Threats Facing Title IV Institutions - Gallery

Adam Shanedling, Special Agent in Charge at US Department of Education Office of Inspector General

Special agents from the Office of Inspector General (OIG) will discuss internal and external financial aid fraud and cyber security threats currently facing institutions of higher education. The presenters will discuss real case examples of these threats, and how OIG's investigative mission to combat fraud and abuse in federal student aid programs can help your organization safeguard those programs by identifying and detecting fraud. The presenters will illustrate complex and common fraud schemes, brief you on indicators that can help you detect internal and external fraud, discuss the criminal and civil remedies sought by the OIG, and inform you concerning how to report potential fraud to the OIG. A question and answer period is planned as part of this presentation.

Engaging Communication with GenZ - Pine

Rob Smith, AVP Growth and Development at ELM Resources

What comes after GenZ? Many of us are still reacting or preparing for GenZ, and they are already on your campus. How about the next generation? Come find out what changes you should be making to best interact with this group, and how we may be able to prepare for the group coming up behind them.

Default Prevention on limited resources - Lincoln

Greg Kerr, Senior Sales Manager at ECMC

Helping students navigate the complexities of paying for school is all of our mission. Oftentimes, when they need help the most is when they are overwhelmed and slip into delinquency. How can we lend a helping hand when we are already dealing with a full workload? We will be discussing some ways to do this while maintaining your sanity and without breaking the budget.

Engaging Students with Technology: What Happens When Siri & Alexa meet Financial Aid? - Sitka

Dianne Fulmer, Director of School Partnerships & SVP School Partnerships at FATV

Looking for innovative, leading edge ways to engage with your students? Come learn how artificial intelligence is helping campuses answer student questions. In a 24/7/365 world, students expect consistent answers all day every day through their phones, tablets, laptops and other media. This session will explore utilizing technology to assist in engaging with your students. It will include audience participation that will share their experiences & successes when it comes to engaging students.

President's Reception - Long House

5:30 pm - 7:00 pm

Anastacia Dillon, Financial Aid Director at Lewis & Clark College

Come meet current OASFAA President Anastacia Dillon and the rest of your Executive Council, mingle with your colleagues and our Corporate Partners and sample some of Salishan's finest cuisine at a brief get-together before heading out to dinner.

Two Tickets to Paradise - Presidents Sunset Suite

8:00 pm - 12:00 am

Anastacia Dillon, Financial Aid Director at Lewis & Clark College

Join current OASFAA President Anastacia Dillon for some drop-in casual conversation, meet new people, catch up with old friends and wind down after a long day. The Presidential Sunset Suite is located in rooms 182, 183, 184.



Thursday, February 7th, 2019

Breakfast - Long House

8:00 am - 8:45 am

WASFAA Update - Long House

8:45 am - 9:15 am

Ashley Munro, Associate Director of Financial Aid at University of Alaska Fairbanks

Intersession Break & Visit with Corporate Partners - Council House

9:15 am - 9:30 am

Take a break and visit with the Corporate Partners!

Breakout Session #3 - Segmental Meet and Greet

9:30 am - 10:20 am

Gather with your colleagues from across the state to discuss what is happening in your sector and how OASFAA can better support you.

Community College Meet & Greet - Cedar Tree, Kate Hoerauf, Asst Director at Chemeketa Community College

Proprietary Schools Segmental Meet & Greet – Gallery, Tracy Reisinger, American College of Healthcare Sciences

Public 4 Year Meet & Greet - Pine, Debbie O'Dea, Financial Aid Counselor at Southern Oregon University

Private 4 year Meet & Greet - Lincoln, Russell Seidelman, Assistant Director of Financial Aid at University of Portland

Corporate Partners Meet & Greet - Council House, Greg Kerr, Senior Sales Manager at ECMC

Breakout Session #4

10:30 am - 11:20 am

Year Round Pell - Cedar Tree*Rick Renshaw, Federal Student Aid Training Officer at US Department of Education*

Come and hear an overview of the provisions governing year round Pell Grants. This session will include a review of the statutory and regulatory provisions, examples of determining award amounts, and related COD operational reminders. Please register for the Federal Training Sessions at <https://cvent.me/nG9rv>

Trends in Higher Education - Gallery*Ciel Senechal, Campus Development - West Region at College Ave Student Loans*

This has been a volatile year for higher education. Sliding enrollments, an increasingly diverse student population, concerns about cost and access, and an emphasis on value and job placement have become increasingly important factors for colleges and universities. Come hear the latest statistical trends on these and other topics impacting higher education. You will be armed with information you can take back to your campus as you plan for future initiatives to attract, retain and fund students.

Coaching students on Financing College and Managing Debt - Pine*Diana Hoff, Executive Director of the Renaissance Foundation at The Renaissance Foundation*

Share Best Practices around coaching students on Financing College and Managing Debt

How to Make Student Communications Stick - Lincoln*Matt Bernard, Account Development Director at CampusLogic*

Communicating effectively with students requires first getting their attention - but that's exceedingly more and more difficult. A consistent message paired with a multi-channel approach can help. Join us to learn the channels that drive student engagement at the right moment in the financial aid lifecycle. Work through a sample scenario where the end product is a consistent message ready to put into five channels simultaneously. Leave with immediately implementable tips you can use to optimize your communications and drive results.

Intersession Break & Visit with Corporate Partners - Council House

11:20 am - 11:40 am

Take a break and visit with the Corporate Partners!

Breakout Session #5

11:40 am - 12:30 pm

SULA Update - Cedar Tree*Chuck Hirman, Direct Loan Division at US Department of Education*

The 150% subsidized loan limitation (SULA) has been in place since 2013/14. Schools definitely have the basics down as subsidized reporting improves with each passing year. But we still see certain topics often cause misunderstandings and a fair amount of misreporting. This session is designed to explore the misunderstandings and misreporting. It will also tackle two of the more tricky situations we often encounter: what to do when a student's remaining eligibility is under a full year, and what caused a loss of subsidy. Bring your SULA questions to discuss because if something is confusing you it's probably confusing others too.

VA Education Benefits - Gallery*Jeff DeMott, Financial Aid and Veteran Services Coordinator at Portland Community College*

This session will discuss the basics of VA Education Benefits that could help in Financial Aid. Topics will include how benefits relate to FAFSA, recent legislation, SAP, Tuition Assistance, Scholarships and more.

Live Entrance and Exit Counseling - Pros/Cons - Lincoln*Hali Lingren, Financial Aid Representative at Klamath Community College*

This session will go over why KCC switched to live counseling and how it has helped us and our students. Pros and cons for giving live in person counseling, examples of our slides and our processes.

Financial Flight Plan: Peers Helping Peers - Pine

Kiara Galicinao, Financial Aid Counselor at University of Oregon

Cassie Copeland, Financial Aid Counselor at Pacific University

Looking for a way to expand your campus' financial literacy efforts? A peer-to-peer connection is invaluable for ensuring relevant and relatable content delivery. The University of Oregon's Financial Flight Plan (FFP) has recently implemented a Peer Financial Education Program to further support students and their financial wellness. Collaborating with Oregon Community Credit Union (OCCU), FFP has been able to extend its outreach into local high schools to focus on college preparation and financial wellness at early stages. This session will explore peer-to-peer relationships, training curriculum, program implementation, community-campus partnerships, and assessment of program effectiveness.

Student Loan Counseling Strategies - Sitka

Greg Kerr, Senior Sales Manager at ECMC

Borrowing to pay for college is the easy part. But choosing the best repayment options can range from merely confusing to downright complex. Join us as we review the repayment options available under each program, look at the pros and cons of available programs, strategies to reduce the total amount of interest paid over the life of the loan and options for keeping repayment affordable.

Lunch - Long House

12:30 pm - 1:15 am

Meet the 2019 OASFAA Charity: Young Entrepreneurs Business Week - Long House

1:15 pm - 1:45 pm

Dawn Myers, Program Manager at Young Entrepreneurs Business Week

YEBW was founded in 2006 with a simple vision: Educate and inspire youth to become our future business leaders! High school students spend a full week on a college campus with hands-on learning to explore industries, careers and a look into college life after high school. YEBW incorporates inspirational speakers, interactive learning exercises and other professional growth activities in their program utilizing volunteers from the community including educators, executives and professionals to guide, coach and mentor high school students through business curriculum and competitions.

Intersession Break & Visit with Corporate Partners - Council House

1:45 pm - 2:00 pm

Take a break and visit with the Corporate Partners!

Breakout Session #6

2:00 pm - 2:50 pm

Writing Dollars Into Sense: Simplifying Financial Aid Materials for Prospective Postsecondary Students - Cedar Tree

Zachary Taylor, Research Assistant and PhD Student at The University of Texas at Austin

This hands-on session will inform financial aid practitioners of how to write simple financial aid materials. The presentation will discuss techniques of clear writing, how to publish web accessible websites, and how to provide polylingual materials for diverse audiences.

Virtual Financial Aid Nights - Gallery

Jenn Satalino, Director at The College Place Oregon

In September, OASFAA held our first Virtual Financial Aid Night for rural students and families in conjunction with Oregon GEAR UP and The College Place Oregon. We'll talk about what went well, what could be improved, and what we learned from the experience. We'll also listen to your input, solicit your suggestions and share our big goal for 2019 with you!

Exhausted to Exuberant: 3 Keys to Break Free From Burnout - Pine

Danielle Isaac, Life Mastery Consultant at Danielleisaac.com

Would you love to have more energy and vitality? Would you love to wake up feeling vibrant and ready for the day? During Danielle's talk you'll learn: The secret to feeling more vibrant and alive each day. The #1 reason why people struggle to feel energized and what you can do to overcome it. The simplest way for you to start feeling better quicker.

Mobile Financial Aid: What Your Students Really, REALLY Want - Lincoln

Matt Bernard, Account Development Director at CampusLogic

Students today are used to mobile, online communication they aren't used to waiting for information. Too often, complicated, manual, generic financial aid processes create barriers to student success. Don't believe us? Believe the 730 students we surveyed nation-wide. Hear about the improvements they want to see made to the FinAid process. Walk the student finance journey and identify points of friction at your institution—and brainstorm solutions.

Intersession Break & Visit with Corporate Partners - Council House

2:50 pm - 3:10 pm

Take a break, grab a snack, and visit with the Corporate Partners!

Breakout Session #7

3:15 pm - 4:05 pm

Top Ten Compliance Findings - Cedar Tree

Rick Renshaw, Federal Student Aid Training Officer at US Department of Education

This session will review the most recent survey of the "Top 10 Program Review and Audit Findings." Will offer suggestions to help you improve your school's program administration and compliance efforts. Please register for the Federal Training Sessions at <https://cvent.me/nG9rv>

Supporting Indigenous Students through the Waves of Higher Ed - Gallery

Luhui Whitebear, NAL Assistant Director at Oregon State University

Navigating the higher education experience can be challenging for many Indigenous students, particularly on a predominately white institution. Join Luhui in this session to learn more about the work being done at Oregon State University through the Native American Longhouse Eena Haws to help support Indigenous students. Topics covered will include mentoring, best practices, partnership strategies with other departments, and the nuances of maintaining cultural programs on campus as well as ideas financial aid offices can use to support Indigenous students.

Path to a Financial Wellness Center - Lincoln

Amanda Nguyen, Interim Director of Student Financial Aid and Scholarships and Director of Student Financial Services & the Financial Wellness Center at Portland State University

Beginning in 2010 the Student Financial Services at Portland State University began implementing strategic changes to promote financial transparency and education to the students. We will share the small and large projects leading up to the establishment of the Financial Wellness Center with Student Financial Services. Along the way we will touch on how buy-in was created across campus, the partnerships and outcomes, how the Financial Wellness Center works, and the steps taken to create a coordinated service network between Financial Aid, Registrar, Academic Advising and Student Financial Services.

Financial Flight Plan: Investing in Community - Pine

Kiara Galicinao, Financial Aid Counselor at University of Oregon

Cassie Copeland, Financial Aid Counselor at Pacific University

Collaborating with Oregon Community Credit Union (OCCU), the University of Oregon's Financial Flight Plan (FFP) has been able to extend its outreach into local high schools to focus on college preparation and financial wellness at early stages. This session will explore community partnerships, peer-to-peer relationships, training curriculum, program implementation, and assessment of program effectiveness.

Helping Undocumented & DACAmented Students Navigate Financial Aid - Sitka

Amy Keir, State Grants Administrator at Oregon Office of Student Access & Completion

Join professionals from the nonprofit, state, and campus levels as we delve into in-depth issues to help you support undocumented students in navigating the financial aid process. Learn tips, resources, and special considerations related to: filing the ORSAA, filing the FAFSA for mixed status families, applying for private scholarships (including OSAC and ECMC), institutional aid, and more. Bring your tough questions! Connect with other professionals in the field who are committed to serving this population.

Social Hour - Long House	5:00 pm - 6:00 pm
Surfs Up - Dinner - Long House	6:00 pm - 6:45 pm
Awards and Recognition - Long House	6:45 pm - 7:15 pm
Beach Party Bingo - Gallery	7:30 pm - 12:00 am
Karaoke - Attic Lounge	8:00 pm - 12:00 am



Friday, February 8th, 2019

Breakfast - Long House	8:00 am - 8:30 am
OASFAA Business Meeting - Long House <i>Anastacia Dillon, Financial Aid Director at Lewis & Clark College</i>	8:30 am - 9:00 am
Breakout Session #8	9:10 am - 10:00 am

Direct Loan Update - Cedar Tree
Chuck Hirman, Direct Loan Division at US Department of Education

Direct Loan processing at COD has had a period of relative stability but certain edits, whether rejects or just warnings, hit with a fairly high frequency. This session will cover the set-up of the 2019/20 award year in COD, address the most frequently hitting DL edits, and discuss some of the school stumbles reported to us by the COD reconciliation team, a way to see what caused a real mess with some schools so you can avoid the same mistakes.

Helping Undocumented & DACAmented Students Navigate Financial Aid - Gallery
Amy Keir, State Grants Administrator at Oregon Office of Student Access & Completion

Join professionals from the nonprofit, state, and campus levels as we delve into in-depth issues to help you support undocumented students in navigating the financial aid process. Learn tips, resources, and special considerations related to: filing the ORSAA, filing the FAFSA for mixed status families, applying for private scholarships (including OSAC and EMMC), institutional aid, and more. Bring your tough questions! Connect with other professionals in the field who are committed to serving this population.

PERSIST - a comprehensive guide for student success - Pine
Jenn Satalino, Director at The College Place Oregon

Do you want to impress your boss and show them how sending you to the conference was a good idea? Come back ready to start a conversation on how well your institution retains its students. In this hands-on session, we will show you how IPEDS data can help you assess current retention efforts, determine which students are succeeding or failing, recognize the predictors of dropping out, and define reachable retention goals. This session will look at the strengths and gaps in institutional practices that have been shown to be related to the success of all students, with a particular focus on the needs of low-income or first-generation college-going students. We will work in groups to identify whether the necessary building blocks are in place from which to implement effective retention programs at your institution.

Starfish on the Beach: Equity and Ethics in Financial Aid Awarding - Lincoln

Mike Johnson, Financial Aid Director at Columbia Gorge Community College

Many of you have probably read or heard the ‘Starfish Story’. In all versions, two strangers talk about whether it makes a difference to save one starfish by throwing it back into the water. The answer depends on one’s perspective – whether one looks at the starfish as individuals or as a population. This session will provide the opportunity to exchange ideas about how awarding financial aid is like saving starfish. On a beach covered with starfish, what criteria does one use to save them? When is it appropriate to focus on individuals, and when should you act primarily with the population in mind? How many do you need to save to have been successful? What constraints keep you from being able to save all of them, and what control do you have over those constraints? Does it matter how they ended up on the beach?

Making Financial Literacy Accessible: Creating Web Content for Students with Disabilities – Sitka

Zachary Taylor, Research Assistant and PhD Student at The University of Texas at Austin

On January 18th, 2018, US Congress amended Section 508 to hold all Title-IV institutions responsible for publishing web accessible websites and information for students with disabilities. This amendment occurred due to a litany of institutions facing discrimination lawsuits for failing to publish web accessible content. This session will provide an overview of the literature and hands-on training for auditing and publishing web accessible financial literacy information for students with disabilities. Practitioners will leave with free, simple tools to render their websites accessible for students with disabilities.

Federal Update - Long House

10:10 am - 11:15 am

Rick Renshaw, Federal Student Aid Training Officer at US Department of Education

Join us to get caught up on the latest happenings with the U.S. Department of Education. Questions are welcome! Please register for the Federal Training Sessions at OASFAA by going to this website <https://cvent.me/nG9rv>

Closing Remarks & Adjourn - Long House

11:15 am - 11:30 am

Anastacia Dillon, Financial Aid Director at Lewis & Clark College