



April 6-7, 2017 | Stoney Creek Hotel | Johnston

President's Welcome

From Chris Ditter

2016-2017 IASFAA President

Welcome to the Spring 2017 IASFAA Conference in my hometown of Johnston, Iowa. Our theme this spring is *We're All Winners in IASFAA*. Angie Carlson, Gary Adams and members of their respective program and site 'teams' have been hard at work to ensure you all experience an information-packed and enjoyable conference.

We kick off the conference with NASFAA Verification credential training by Randi Boelkes and Revae Nelson. This training is great way for members as well as non-members to earn NASFAA credentials so I hope many of you are able to take advantage of this opportunity. The conference program offers a 'winning' combination of general and interest sessions with a little something for everyone. Session topics range from SULA, Advanced SAP, PPY, Verification, Conflicting Information, all the way to Excel Basics.

I am pleased to welcome special guests Zack Goodwin, FSA Training Officer with the U.S. Department of Education and Sue Swisher, our MASFAA past President from Saint Xavier University in Chicago, Illinois. We are very fortunate to have them participate in our conference and share their knowledge and expertise with us. Please make sure to give them a warm Iowa welcome as you see them throughout the conference.

Make sure to stop by the exhibit area and also attend the Business Solutions Sessions offered by our associate members to learn what useful tools and resources they have available for you and your students. Please take the time to thank them as our association, offices and students would not be as successful without their continued support.

I encourage you to make the most of your Spring 2017 IASFAA Conference by attending some great sessions, networking, socializing, enjoying dinner with colleagues, and donating to a great cause.

Thank you for supporting IASFAA. Enjoy the conference!

Chris Ditter

2016-2017 IASFAA President

2016-2017 IASFAA EXECUTIVE COUNCIL

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Chris Ditter
Drake University

President-Elect

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Hawkeye Community College

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Drake University

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Iowa College Student Aid Commission

Carolyn Schwendeman
Luther College

Erick Danielson
ICAN-Iowa College Access Network

2016-2017 Program Committee

Angie Carlson (Chair) – Capri College
Julie Haack (Co-Chair) - St. Ambrose University
Gary Adams - Iowa Student Loan
Marsha Boender - Iowa Student Loan
Mary Bloomingdale – North Iowa Area Community College
Shelly Brimeyer - University of Iowa (The)
Christine Ditter - Drake University
Emily Dougill - Iowa State University
Sarah Freestone – Southwestern Community College
Erin Gjerde-Bailey - Wells Fargo EFS
Sheila Goodwin – Drake University
Mary Jacobsen - iLink Service Center
Jobyna Johnston – Allen College
Rachel Moser - Luther College
Shelby Reed – Briar Cliff University
Kelsey Ryder - University of Iowa (The)
Jennifer Schroeder - Iowa State University
Carolyn Schwendeman - Luther College
Mary Jo Smith - Retired
Laura Steinbeck - Sallie Mae
Denise Stowman - Drake University
Julia Sullivan - Iowa State University

2016-2017 Site Committee

Gary Adams (Chair) – Iowa Student Loan
Greg Geistkemper (Co-Chair) – St. Ambrose University
Erick D Danielson - ICAN-Iowa College Access Network
Kristi Fuller - Drake University
Brandi L. Miller - Drake University
Debbie J Murphy - Great Lakes Higher Education Corporation
Chad Olson - Iowa State University
Jennifer Schroeder - Iowa State University

Exhibitors

IASFAA appreciates the generous support we receive from our exhibitors. Please take the time to stop by their exhibits to thank them for their continued support of the association.



Debbie Murphy – dmurphy@glhec.org



A division of Aspire Resources Inc.

Mary Jacobsen - [mjacobson@AspireResourcesInc.com](mailto:mjacobsen@AspireResourcesInc.com)



Juan Perez – juanp@inceptia.org



Marsha Boender - mboender@studentloan.org



Laura Steinbeck – laura.steinbeck@salliemae.com



Erin Gjerde-Bailey - Erin.e.gjerde@wellsfargo.com



Sara Edwards - sara.edwards@citizensbank.com



Daniel Gonzales - daniel.gonzales@campuslogic.com



Denise Sullivan - denisesullivan@discover.com



Alan Ishida - aishida@asa.org

IASFAA's Charity Efforts Spring 2017

LOOKING FOR DOOR 1, DOOR 2, or DOOR 3?

The Program Committee has selected CTE Hope as our spring charity. As stated on their website, "We exist to provide HOPE to individuals and families who have had concussions and other head injuries by providing education and awareness to the public and supporting research that pertains to the diagnosis, management, treatment, and healing necessary to prevent the long-term effects of head traumas and concussions that can lead to Chronic Traumatic Encephalopathy (CTE). We provide support and hope to those who suffer from early symptoms. We are an advocate, a voice, seeking preventative measures so that athletes, parents, trainers and coaches have the best information at those critical moments to keep athletes safe."

More information about CTE Hope can be found on their website <http://www.cte-hope.org>.

We will be raising donations for CTE Hope by having a Mystery Auction!

The mystery auction will be on Thursday night after dinner. IASFAA's auctioneer, Aaron Steffens, will be looking for audience participation. Please bring wrapped items for the membership to bid on and plan to stay for all the fun on Thursday night!

Mark Your Calendar for the IASFAA 2018 Spring Conference Celebrating 50 Years of IASFAA

April 4-6, 2018

[Stoney Creek Hotel & Conference Center](#)

Johnston, IA

IASFAA Spring 2017 Agenda

Thursday, April 6, 2017

7:30 am – 8:00 am	Newcomers Reception <i>Pioneer</i>				
7:30 am – 8:00 am	Breakfast (for those staying overnight at hotel only)				
7:30 am – 2:00 pm	Conference Registration <i>Northwoods Conference Center</i>				
8:00 am – 8:40 am	IASFAA President's Welcome and Charity Introduction <i>Northwoods Conference Center</i>				
8:45 am – 9:45 am (Interest Sessions)	150% Subsidized Usage Limit Applies <i>John Deere</i>	Excel Basics <i>Pioneer</i>	The game of <i>LIFE</i> – Financial Literacy on Your Campus <i>Meadows</i>		
9:45 am – 10:15 am	Break – Exhibit Hall Open <i>Loose Moose</i>				
10:15 am – 10:45 am (General Session)	State Update <i>Northwoods Conference Center</i>				
10:45 am – 11:00 am	Break				
11:00 am – 11:20 am (Business Solutions Sessions)	Thank You Notes with Gary and Matt <i>Pioneer</i>	What's New for Great Lakes in 2017 <i>Meadows</i>	iLINK Tips and Tidbits <i>John Deere</i>		
11:25 am – 11:45 am (Business Solutions Sessions)	Wells Fargo Resources Update <i>Pioneer</i>	5 Must Haves for Modern Financial Aid <i>Meadows</i>			
11:50 am – 1:30 pm	Luncheon Includes: IASFAA resources session, introduction of newcomers, and Awards Presentation <i>Northwoods Conference Center</i>				
1:30 pm – 1:45 pm	Break				
1:45 pm – 2:45 pm (General Session)	Transition to the Iowa College Aid Processing System <i>Northwoods Conference Center</i>				
2:45 pm – 3:15 pm	Break – Exhibit Hall Open <i>Loose Moose</i>				
3:15 pm – 4:15 pm (Interest Sessions)	FA 101: Strong Spinners Only: Getting a Grip on Student Loan Forgiveness Programs <i>John Deere</i>	Panel Discussion Covering Professional Judgment, Dependency Status, Conflicting Information and 399 <i>Pioneer</i>	Advanced SAP <i>Meadows</i>		
4:15 pm – 4:30 pm	Break – Exhibit Hall Open <i>Loose Moose</i>				
4:30 pm – 5:15 pm (Sector Meetings)	Community Colleges <i>Pioneer</i>	Regents <i>Meadows</i>	Private <i>John Deere</i>	Associate Members <i>Northwoods Conference Center</i>	Proprietary <i>Pines</i>
5:30 pm – ???	Dinner, Mystery Auction, Game Night <i>Northwoods Conference Center</i>				

Friday, April 7, 2017

7:30 am – 8:00 am	Breakfast (for those staying overnight at hotel only)		
8:00 am – 9:00 am (Interest Sessions)	TEACH Grant <i>John Deere</i>	Reading Through the Lines: Completing Verification Using Federal Income Tax Return Transcripts <i>Pioneer</i>	FA 101 – Where Do I Go? <i>Meadows</i>
9:00 am – 10:15 am	Presentation of Charity Check MASFAA Update IASFAA Business Meeting Ceremonial Passing of the Gavel <i>Northwoods Conference Center</i>		
10:15 am – 10:45 am	Check Out Break		
10:45 am – 11:45 am (General Session)	Federal Update <i>Northwoods Conference Center</i>		

IASFAA 2017 Spring Conference Agenda

Wednesday, April 5, 2017

2:00 pm – 4:30 pm

Pre-Conference Workshop
NASFAA Credential Training: Verification

Northwoods Conference Center

Thursday, April 6, 2017

7:30 am – 8:00 am

Newcomer Reception

Pioneer

All new IASFAA members and/or first time conference attendees are invited to attend this session. During this session, you will learn about IASFAA, including the benefits of IASFAA membership, getting conference tips, and meeting several IASFAA Executive Council Members.

7:30 am – 2:00 pm

Conference Registration Open

Northwoods Conference Center

8:00 am – 8:40 am

IASFAA President's Welcome
Charity Introduction

Northwoods Conference Center

8:45 am – 9:45 am

Interest Sessions

1. 150% Subsidized Usage Limit Applies

John Deere

Presenter: **Zack Goodwin** – Training Officer, US Department of Education

This session will outline institutional requirements for reporting to both the Common Origination and Disbursement (COD) system and to the National Student Loan Data System (NSLDS), and will address how

the Department monitors compliance with the 150% Direct Subsidized Loan Limit requirement. Information on the new 150% edits implemented in October 2016 will be reviewed. We will also discuss ways in which schools can counsel students who are approaching the 150% Direct Subsidized Loan borrowing limit.

2. Excel Basics

Pioneer

Presenter: **Marc Handel** – Senior Research and Data Analyst Manager, Iowa Student Loan

If you struggle with creating formulas, formatting and displaying data within Excel, then this session is for you. Find out the tricks that will put time back into your day.

3. The game of LIFE – Financial Literacy on Your Campus

Meadows

Presenters: **Gisella Baker** – Director of Financial Aid, Hawkeye Community College

Shelly Brimeyer – Financial Literacy Specialist, University of Iowa

Laurie Butz – Student Empowerment Coach, Grand View University

Kelsey Ryder – Financial Literacy Specialist, University of Iowa

Laura Steinbeck – Director of Business Development, Sallie Mae

You may be asking how to start a financial literacy program or, if you have a program, how other schools are engaging students and facilitating their programs. This session will share results from a regional school survey on financial literacy programs in the Midwest. A panel of school presenters will share their experiences and outcomes with their individual financial literacy efforts.

9:45 am – 10:15 am **Break – Exhibit Hall Open and Snack Break**

Loose Moose

10:15 am – 10:45 am **State Update**

Northwoods Conference Center

Presenter: **Todd Brown** - Director of State Student Financial Aid Program, Iowa College Student Aid Commission

Hear the latest and greatest from our state officials during the State Update from ICSAC. You won't want to miss this session!

10:45 am – 11:00 am **Break**

Northwoods Conference Center

11:00 am – 11:20 am

Business Solutions Sessions

1. Thank You Notes with Gary and Matt

Pioneer

Presenters: **Gary Adams** – Lender and School Services Liaison, Iowa Student Loan

Matt Brown – Communications, Program and Research Liaison, Iowa Student Loan

Come see Iowa Student Loan's version of Jimmy Fallon's Thank You Notes. This session will provide attendees the opportunity to be simultaneously informed and entertained.

2. What's New for Great Lakes in 2017

Meadows

Presenter: **Debbie Murphy** – Senior Marketing Associate, Great Lakes

Great Lakes turns 50 this year. Be sure to attend this session to learn about the exciting things Great Lakes will be introducing to schools in 2017.

3. iLink Tips and Tidbits

John Deere

Presenter: **Mary Jacobson** – iLink Manager, iLink

Hear answers to the common questions received by iLink Support Analysts. Also learn some helpful tidbits that could streamline your processing.

11:25 am – 11:45 am

Business Solutions Sessions

1. Wells Fargo Resources Update

Pioneer

Presenters: **Erin Gjerde-Bailey** – Market Relationship Manager, Wells Fargo

Come to this session to see all of the free resources that Wells Fargo provides to High Schools, Parents, Students and our Communities. A brief product overview will also be included.

2. 5 Must Haves for Modern Financial Aid

Meadows

Presenter: **Daniel Gonzales** – Regional Director, CampusLogic

Fact: Students are glued to their mobile devices. Fiction: Financial Aid isn't mobile. Rather than waiting for students to look up from their gadgets, Financial Aid Offices need to get in front of them where they live: their phones. Modern Financial Aid is the solution. In this interactive session you'll experience first-hand how paperless file review, automated student follow-up including SMS/text-messaging and email, and automated file indexing and imaging can change your institution's entire approach to financial aid. Hear about the dramatic impact personalized mobile-optimized web-form wizards, automated updates, e-signature, and secure document upload from any device will have on your student experience.

11:50 am – 1:30 pm **Awards Luncheon**

Northwoods Conference Center

- Lunch
- IASFAA Resources
- Introduction of Newcomers
- John E Moore Award
- Outstanding New Professional
- Outstanding Committee Member
- Student Success Story
- President's Award

John E Moore Award - Named in honor of John E. Moore, the "father" of IASFAA, who convened a meeting of some 30 financial aid people in Des Moines on May 14, 1968 that set the stage for the creation of IASFAA. John, now retired from the University of Iowa, was IASFAA's first president 1968-1969. This award goes to a Financial Aid Office demonstrating the highest standards of service and commitment to

their students and community. Nominations are restricted to schools with at least one current IASFAA regular member and recipient selection is made by the Awards Committee. The previous year's recipients are not eligible.

Outstanding New Professional – The Outstanding New Professional Award recognizes the achievements of a financial aid professional that has been in the financial aid profession for five years or less, but has already made significant contributions to IASFAA or the financial aid profession. Both nominators and nominees must be current IASFAA members (regular, associate, or lifetime), and prior recipients are not eligible for nomination.

Outstanding Committee Member – This award was established to not only honor the outstanding accomplishments of a particular individual but also to recognize the participation and contribution of all IASFAA members who serve on IASFAA committees. Nominations for this award are made by current committee chairs and submitted to the Awards Committee for recipient selections. Both nominators and nominees must be current IASFAA members (regular, associate or lifetime), and prior recipients are eligible for nomination.

Student Success Story – The Student Success Story of the Year Award recognizes a single recipient who symbolizes the importance of financial aid in achieving a post-secondary education. Both the achievements of the nominee and the use of financial aid in the pursuit of his/her educational goals should be addressed by nominators. Nominees must have recently graduated or be in the final year of their program at the institution of the nominating IASFAA member, and must have received Title IV federal student assistance while enrolled.

President's Award – The Presidential Award is an award recognizing a significant contribution to the Association by either an individual or a committee during the President's term in office. The selection of a recipient is optional and is made at the President's discretion. Recipients must be current IASFAA members (regular, associate, or lifetime), and prior recipients are eligible for selection. Upon notice from the President, the Awards Committee prepares the award for presentation by the President at the spring conference.

Menu: Taco Buffett – seasoned ground beef, blackened chicken, tortillas, fresh fried tortilla chips, refried beans, and standard taco toppings. Soda/water provided.

1:30 pm – 1:45 pm **Break – Exhibit Hall Open** *Loose Moose*

1:45 pm– 2:45 pm **Transition to the Iowa College Aid Processing System** *Northwoods Conference Center*

Presenter: **Todd Brown** - Director of State Student Financial Aid Program, Iowa College Student Aid Commission

This session will review the transition from the State of Iowa Scholarship and Grant reporting system to the Iowa College Aid Processing System, including information on how to access your 2017-2018 rosters.

2:45 pm – 3:15 pm **Break – Exhibit Hall Open and Snack Break** *Loose Moose*
Assorted cookies and soda/water provided

3:15 pm – 4:15 pm

Interest Sessions

1. FA 101: Strong Spinners Only: Getting a Grip on Student Loan Forgiveness Programs *John Deere*

Presenters: **Matt Brown** – Communications, Program and Research Liaison, Iowa Student Loan
Julie Voss – Student Financial Aid Programs Specialist, Iowa College Student Aid

Get set, IASFAA! It's time to 'Come on Down'! From the Stoney Creek Inn in Johnston, home of Iowa's favorite Financial Aid conference and the world's most awesome professionals, it's time to *Get a Grip on Student Loan Forgiveness Programs*. Maybe one of these federal or state options will help your students, if the price is right. Come spin the wheel with us to find out!

2. Panel Discussion Covering Professional Judgment, Dependency Status, Conflicting Information and 399 *Pioneer*

Presenters: **Sue Swisher** – Executive Director of Financial Aid, St. Xavier University
Gisella Baker – Director of Financial Aid, Hawkeye Community College
Ean Freels – Financial Aid Director, Des Moines Area Community College
Seth Gage – Assistant Director of Financial Aid, Wartburg College
Zack Goodwin – Training Officer, US Department of Education

This session will discuss new issues associated with PPY, such as 399s, professional judgments, and dependency overrides. Come hear what your peers are doing during this year of change!

3. Advanced Satisfactory Academic Progress *Meadows*

Presenters: **Randi Boelkes** – Financial Aid Coordinator, Mercy College of Health Sciences
Brittany Peterson – Financial Aid Advisor, Iowa State University

This advanced SAP session will provide in-depth information about SAP regulations to aid you in evaluating your school's SAP policy, while giving you the opportunity to discuss best practices.

4:15 pm – 4:30 pm **Break – Exhibit Hall Open**

Loose Moose

4:30 pm – 5:15 pm **Sector Meetings**

- Community Colleges
- Regents
- Private Colleges
- Associate Members
- Proprietary

Pioneer

Meadows

John Deere

Northwoods Conference Center

Pines

5:30 pm - ??

Dinner, Mystery Auction, and Game Night

Menu: Roasted tri-tip steak, market salad, green beans with toasted almonds, roasted garlic mashed potatoes, south union bakery garlic focaccia, soda/water

Friday, April 7, 2017

8:00 am – 9:00 am **Interest Sessions**

1. TEACH Grant

John Deere

Presenter: **Zack Goodwin** – Training Officer, US Department of Education

Have you considered offering the Teacher Education Assistance for College and Higher Education (TEACH) Grant at your institution? If your school already offers it, would a refresher on the TEACH program be helpful? In this session we will review the ‘mechanics’ of administering the TEACH Grant program, including institutional and student eligibility, awarding funds, counseling requirements, and the grant-tracking process.

2. Reading Through the Lines: Completing Verification Using Federal Income Tax Return Transcripts

Pioneer

Presenters: **Merrie Frentress** – Scholarships and Verification Coordinator, Drake University
Nadine Torsrud – Financial Aid Analyst, Hawkeye Community College

Gone are the days of using the easy to read Federal 1040 forms to complete the verification process. Though many students and parents utilize the IRS DRT, there are still some who must provide a copy of the federal income tax return transcript. This session will help to provide information on what lines of the federal income tax return transcript to use to complete the verification process and what information is acceptable in lieu of the federal income tax return transcript.

3. FA 101: Where Do I Go?

Meadows

Presenters: **Korrie Price** – Financial Aid Advisor, Des Moines Area Community College
Alyssa Dick – Financial Aid Specialist, Des Moines Area Community College

Do you struggle helping students and their parents recover FSA IDs, utilize the DRT, or order tax transcripts? Come to this session for some practical advice. We will walk through the financial aid from the student’s perspective, and offer some tips and tricks to make the process more user-friendly.

9:00 am – 10:15 am

Northwoods Conference Center

Presentation of Charity Check
MASFAA Update
IASFAA Business Meeting
Ceremonial Passing of the Gavel

10:15 am – 10:45 am **Check Out Break**

10:45 am – 11:45 am **Federal Update**

Northwoods Conference Center

Presenter: **Zack Goodwin** – Training Officer, US Department of Education

11:45 am **Lunch Box to Go**

Grilled chicken BLT, Mediterranean veggie wrap, turkey and Havarti, gorgonzola pasta salad, soda/water

2017 - 2018 IASFAA Committees

IASFAA's success as an organization can be attributed to the volunteer efforts of our colleagues who dedicate time and effort to provide programs and services to our members. If you would like to serve on a committee (or committees) you may volunteer online www.iasfaa.com or please contact the chair(s) listed below.

Association Communications: To gather and publish news of interest to the IASFAA membership.

Chair: Kelsey Ryder, kelsey-ryder@uiowa.edu

Awards: To coordinate award presentations at the IASFAA conferences that recognizes contributions of IASFAA members.

Chair: Randi Boelkes, rboelkes@mercydesmoines.org

Community Outreach: To provide information on financing higher education to communities other than the financial aid community.

Chair: Matt Falduto, matthew.falduto@kirkwood.edu

Electronic Services: To provide technological support and services including membership, directory and newsletter to IASFAA.

Chair: Mary Jacobsen, mjacobsen@aspireresourcesinc.com

Exhibitor Relations: To coordinate all exhibitor efforts associated with IASFAA sponsored activities.

Chair: Angie Carlson, acarlson@capricollege.com

Federal & State Issues: To monitor and alert the membership of timely legislative and/or regulatory issues and to encourage student aid advocacy.

Chair: Barb Hoffman, bhoffman@coe.edu

Leadership Symposium Task Force

Chairs: Aaron Steffens, stefaa01@luther.edu and Jen Sassman, Jennifer.sassman@wartburg.edu

Professional Development/Training: To promote the professional growth and development of IASFAA members through training opportunities.

Chair: Marsha Boender, mboender@studentloan.org

Program: To plan and coordinate the IASFAA conference.

Chair: Julie Haack, haackjuliea@sau.edu

Site Selection: To select and coordinate site arrangements for the fall and spring IASFAA conferences. Site works closely with the Program Committee and Executive Council to facilitate successful IASFAA conferences.

Chair: Greg Geistkemper, geistkempergregoryj@sau.edu

50th Anniversary Task Force

Chairs: Lois Mulbrook and Susan Ladd, susan.ladd@drake.edu