IASFAA Program Committee Meeting

Hosted at Allen College in Waterloo

Thursday, January 22 (10 a.m. to 2 p.m.)

Conference Dates: April 16 & 17, 2015

Stoney Creek – Johnston, IA

**Attendees: Members Calling In:**

Julie Dunn, Loras College Rick Johnson, TG

Carolyn Schwendeman, Luther College Denise Stowman, Drake University

Chad Olson, Iowa State

Mary Jacobsen, iLink

Debbie Murphy, Great Lakes

Mary Jo Smith, Retired

Shena Thompson, AIB

Maria Upmeyer, iCAN

Angela Carlson, Capri

Terri Gronau, University of Dubuque

Kathie Aswegan, Allen College

Minutes presented to Program Committee by Debbie Murphy and Terri Gronau

Julie Dunn began the meeting by thanking Debbie Murphy for stepping into the co-chair position of the Program Committee. Debbie is replacing Karen Snyder in this position.

**CONFERENCE CALL SCHEDULE LEADING UP TO THE CONFERENCE**

Our first conference call will be Friday, Jan. 30th at 10:00 a.m. All subsequent calls will be every other Friday after that.

Call Instructions:

* Dial the toll free number and follow the prompts:
* Toll Free Number: 866-685-1580
* Conference Code: 5152423376

**CONFERENCE THEME**

* The idea was thrown out that we wanted the Spring IASFAA Conference to be a lead-in (pre-quel) to the Fall MASFAA Conference Theme which is “Growing Connections for Success”.
  + Suggestions made:
  + “Spring Has Sprung”
  + “Cultivating Connections”
  + “Sewing Seeds for Success”
  + “Planting Seeds for Success”

**Winning Theme:** “Planting Seeds for Success”

* The next step is to plan a logo for the Spring Conference. The MASFAA log is 3 puzzle pieces on top of each other with a sprout coming through the top. For IASFAA we would like to play off of this logo and perhaps take the puzzle pieces and scatter them with a seed being planted. Mary Jacobsen will speak with Tara at aspire to see what can be created. A back-up plan is to check with Simpson College who created the MASFAA log to see if they can create something for IASFAA too. Julie Dunn will run the idea by Julie Haack.
* An idea of using pots w/seedlings as center pieces was thrown out. More ideas to follow.

**PRE-CONFERENCE DISCUSSION**

* Concern was raised regarding the cost of putting on a pre-conference and the low number of attendees.
* Pre-conference is offered every other year when IASFAA Leadership isn’t having their conference
* It was suggested that the Pre-Conference start a little bit later on Wednesday afternoon. Has been starting at 12:30, suggestion was that it start at 2:00pm instead.
* Topic selected from the NASFAA Core -- <http://www.nasfaa.org/mkt/training/core/2014-15_CORE_Modules.aspx>
* Kathie A indicated she would be willing to present.
* # 14: CORE Toolkit - Provides general reference documents in three areas: **Cash Management** – listing of requirements for requesting, maintaining, and disbursing Title IV aid funds as well as notification and authorization requirements; **Program Participation Agreement** – chart identifying conditions which trigger a reporting requirement, the effect the condition has on the institution’s Title IV eligibility, and when these changes should be reported; and **Reporting, Disclosure, and Recordkeeping** – chart outlining reporting, disclosure, and recordkeeping requirements related to the administration of the Title IV student aid programs. (NOTE: this module does not contain an Instructor Guide or PowerPoint as the handouts are self-explanatory.)

**GENERAL SESSIONS**

* Chad Olson threw out the prospect of getting “Pete the Planner” for a general session on Financial Wellness at the spring conference. He is a radio show/podcast host and is rather expensive; however, Iowa State is going to be hosting him in the Spring and Chad is going to check into what the cost would be to perhaps piggyback him into our spring conference. Chad will report back to committee once he has more information on this.
* Susan Ladd from Drake University had sent an e-mail to Julie Dunn with a perspective speaker for General Session, or a lunch speaker. Susan heard on a talk radio show about the high school principal from Marshalltown High School – Aiddy Phomvisay. Mr. Phomvisay is a refuge from Laos and a strong advocate of student’s attending college to obtain an education. If we decide to reach out to him as a lunch speaker it will have to be on Thursday since that’s the only lunch on the schedule for this conference. Matt from Marshalltown Community College may have a connection. Julie Dunn will follow-up to see if Mr. Phomvisay is available.
* Department of Ed, Federal Update – Debbie Murphy will see if FSA has anyone available to speak at the spring conference.
* Julie Dunn said that Val Meyers – State Exchange Michigan Rep has offered to present at our conference. Julie will follow-up to find out her area of expertise and type of session that she would fall into.
* Julie stated that since we had a fairly inexpensive conference in the fall, that that would perhaps allow us to spend a little more for this conference.
* NASFAA Update – Debbie Murphy asked if we had checked their travel calendar yet to see if they are even available. She said they do offer a “Skype in” option. Is this something that we would consider?

**ROUNDTABLE “Speed Discussions” SESSIONS/TOWN HALL MEETINGS**

* Concern was voiced by several members of the committee that the roundtable sessions didn’t allow adequate time for discussion. At past conferences there was only 10 minutes for each topic and that wasn’t enough time to have a thorough discussion at your table before you had to move onto the next table. The suggestion was made that if we are to continue these types of sessions, we need to allow 20 minutes per discussion before moving onto another topic/table.
* This discussion led to…..the suggestion that we pare down some of the interest sessions from an hour and 15 minutes to one hour. There were several sessions at our last conference that were over in 20-30 minutes and this left a lot of idle time. By shortening some of the interest sessions, we can add more time to roundtable sessions OR…..
* We could replace the Roundtable Sessions with a Town Hall Meeting format (idea introduced by Debbie Murphy). The Town Hall format would allow us to take 3-4 topics that woudn’t have enough information to have an entire interest session on, but would allow for the entire room to weigh in on the topics and hear what everyone else has to say.
* The three topics that were thrown out as a suggestion for a Town Hall Meeting were:

1. FSA User ID issues
   1. Concerns
   2. Procedures
   3. Best practices of communicating this new process to families
2. Unusual Enrollment Process
3. Title IX
   1. Also add into this: Violence Against Women Act

* The idea behind the Town Hall concept is that no one will feel that they are missing out on conversations from other tables and that it gives everyone the change to hear all of the feedback, not just a small representation. Angie threw out the idea of having a “plant” in the room that would initiate the first question on each topics if necessary in order to generate discussion. There would be a moderator facilitating the session and introducing each topics. We should come up with 1 or 2 additional topics in case the first 3 don’t have enough conversation to fill the allotted time.

**INTEREST SESSIONS**

Per surveys from last conference, people want more advanced topics that appeal to the more seasoned Financial Aid professionals. Sessions at the last conference ran very short for the most part and members felt this was due in part to the level of information being more towards newer FAOs. This is where it was reiterated that perhaps we cut down the time allotted for some of the interest sessions to an hour; allowing more time for other types of meetings (Town Hall/General Sessions/Business Solutions, etc.)

Some guidelines for Associate Members presenting an interest session was also discussed:

o If an associate member is presenting an interest session, the requirement is that they must also be exhibiting as well.

o The interest session must be neutral and completely stripped of any branding and be strictly informational.

We have time slots for 12 interest sessions.

Proposed Interest Sessions were:

* Violence Against Women Act (suggested to be moved to Town Hall Mtg as part of Title IX discussion; see notes above)
* Unusual Enrollment History (also moved to Town Hall venue)
* Title IX (Town Hall venue)
* FSA ID Changes; best practices in communicating changes to families (moved to Town Hall venue)
* Identity Theft w/IRS (Mary Jo will check with the Attorney General’s office to see if there would be someone available to facilitate this)
* Compliance and Program Review (Mary Jacobsen said she has a meeting coming up with her Compliance Officer and will bounce ideas off of them)
* How to Have a Conversation w/State Officials
* Administration of Campus Based Funds
* Technology and Social Media
* Privacy and Protection of Information Responsibilities (especially pertaining to social media and cell phone technologies)
* Top 10 Audit Findings
* Veterans Benefits, Veteran Friendly
  + Maria from iCan and Denise Stowman will work together on finding someone that could facilitate this. One suggestion was Vickie at Kirkwood who has received honors for her works with the Veterans Affairs office.
* How America Pays for College
* Enrollment Reporting Issues – CIP and loan processing (Tim Kremer has stated that he would be willing to present this session, or co-present w/Angela Carlson from Capri)
* Business Solution Sessions will be offered, w/4 different conference rooms available = 8 breakouts available.
  + Sessions will be offered to paid exhibitors on a first come – first serve basis
  + There is no additional fee for the Business Solution Session.

**Additional interest session topics discussed after lunch break**

* Study Abroad
* Consumer Information

**Entertainment ideas:**

* Scavenger hunt – everyone loved it in the fall.
  + The committee liked the idea of doing it again if we don’t have the mystery auction
    - Mary J volunteered to coordinate the hunt if we have it.
* Game night
  + Might be good if we are able to have the mystery auction

**Awards:**

When: lunch or dinner on Thursday?

* Committee suggested that the awards be given at Thursday dinner.
  + Mary Jo is in support of that and will take that back to the awards committee

What:

Awards being given:

* Student success story
* Committee Member of the Year
* Jon Moore Award
* Outstanding Young Professional of the Year
* President’s Award given during business meeting

**Charity:**

* “I Have A Dream” –program in Des Moines
  + Forwarded to Gary Adams from Matt Brown
  + Like the idea of the high school being pulled in especially with the potential of the Marshalltown High School principal being there.
    - What are the funds being used for?
      * Appears to be for: starting savings programs, academic assistance and college planning
* Iowa Combat Veterans
  + Would be able to do a presentation.
  + Have some great programs.

Maria will research suggestions and report back to the group on Friday, January 30, 2015 conference call

How to raise funds for the charity?

* Prefer the Mystery Auction
  + Aaron Steffens
  + Mary’s dad? – Mary will check to see if her dad would be available on Thursday, April 16th.
* Silent auction
* Asking folks who aren’t able to attend to contribute, send $$

**To Do List**

Assignments were made:

* Moderator Packets: Shena (noted there is no need for certificates of appreciation)
* Meals: Chad O.
* Coordinate with Exhibitor Relations Chair: Kathie A
* Software Meetings: Still need a coordinator to assign facilitators for each session **Terri G. from University of Dubuque can take this on if no one else has yet.**
* Registration Table: Carolyn and Kathie A.
* Newcomers: Jennifer Schroeder
* Charity Event: Maria
* Create Save the Date/Conference Announcements: Mary J and Carolyn
* Conference Evaluation: Debbie M
* VIP Gifts: Mary Jo
* Pre-conference workshop: Kathie
* Decorations: Carolyn (ideas shared – seeds, plantings from DMACC)

**ALSO**….since I (Terri Gronau) had to leave the meeting early and wasn’t in on the “To Do List” activities, please let me know where I can help out. Also….whomever was the coordinator for the Software Meetings last time….I would appreciate any tips on this job so that I don’t drop the ball on anything.

If anyone has any corrections/additions they see that need to be made to these minutes, please contact Terri Gronau immediately at [tgronau@dbq.edu](mailto:tgronau@dbq.edu). I will make corrections immediately and get them resent asap.

Thanks for a great meeting.