Hello WVASFAA Colleagues!

On behalf of the WVASFAA Conference Committee and Executive Committee, I would like to take this time to welcome you to the 2017 WVASFAA Spring Conference at Canaan Valley Resort in Davis, West Virginia, where we are celebrating 50 years – A Half Century Opening Doors to Educational Opportunities.

This week will allow us to celebrate our past 50 years, as well as continue to enhance our understandings, best practices and processes for our students’ futures. We will also receive countless opportunities to build our network of trusted colleagues to lean on as we all so often do. I encourage you to comb through this program with a keen eye – as our program and site committees have developed a strong agenda.

We would also like to welcome our Bursar and Business Office colleagues this year to our conference. We are hoping with the focus on the National Association of Student Financial Aid Administrators Credential Training, you will be better able to collaborate and plan with your Financial Aid Officers for the futures of both your students and institutions.

Finally, I would like to congratulate West Virginia on their continued success in earning national credentials. WV has been consistently ranked in the top 5 in the country on earned credentials with well over 550 to date and counting! The dedication shown by our state to keep learning and growing within our profession is being noticed regionally and nationally time and time again. Thank you for wanting to be the best for our students!

I cannot thank the Conference Committees and Executive Committee enough for the countless hours they devote to WVASFAA and making these conferences exceptional. As always, we thank our conference sponsors for their time and financial support in helping to keep our conferences affordable for our state employees and institutions.

Sincerely,

Katie Cooper
WVASFAA President
WVASFAA is a professional organization devoted to enhancing professional competency, assisting in the development of effective programs, facilitating communication, and providing training opportunities in the field of student financial aid services.

Our association was formed in 1967. In that time, we have had several name changes, a few constitutional revisions, and a significant impact on training in the financial aid profession. Financial Aid Officers had been meeting with the Student Personnel Administrators of West Virginia Association of Student Personnel Administrators (WVASPA) during their twice-a-year meetings.

The spring meeting of the Student Personnel Administrations in 1967 was held at the Clarksburg Branch of Salem College, Clarksburg, WV. Many of the institutional representatives responsible for financial aid were Deans of Students. The Deans of Students from Concord College (Kevin O’Sullivan) and West Virginia Institute of Technology (David Palmer), and the Scholarship/Veterans Coordinator from West Virginia University (Neil Bolyard) drafted a brief constitution for an organization, the West Virginia Collegiate Financial Aid Officers Association (WVCFAOA) on April 30, 1967.

It was a loosely defined organization with a minimal amount of structure. David Palmer was adamant that another formal organization was probably not really necessary and suggested that there be only two officers, a chairman and a vice chairman. There was no treasurer since no dues were proposed and no secretary since the drafting of the original constitution permitted the vice-chairman to take minutes should the group decide minutes were really necessary.

On Monday, May 1, 1967, representatives of seven public and two private institutions met and adopted the first constitution. The institutions represented were: Concord College, Glenville State College, Marshall University, Salem College, Shepherd College, West Virginia Institute of Technology, West Virginia State College, West Virginia University, and Wheeling College. Membership was institutional.

Following adoption of the constitution, those in the initial meeting elected David Palmer (West Virginia Institute of Technology) as the first Chairman and Freda Burkett (West Virginia State College) as the first Vice-Chairman.

The following year the group changed its name to the Council of West Virginia Collegiate Financial Aid Officers at the suggestion of the West Virginia Commission on Higher Education. The commission wanted to create a “super council” with representatives of all aspects of higher education as members, including groups like physical plant and central administration, as well as academic deans. There were councils representing all areas of student personnel: Financial Aid, Placement, Student Activities, Housing, Foreign Students, etc.

The spring meeting in 1969 was huge, involving all the councils, the meeting was held in Charleston. In 1969, the state legislature created the West Virginia Board of Regents and abolished the Commission on Higher Education. The council concept and joint meeting were abandoned in 1970.

While the financial aid group met in 1970, the constitution was revised extensively, with major changes, including a new name: The West Virginia Association of Student Financial Aid Administrators. Membership was changed from institutional to individual with dues established at five dollars annually. The Association membership continued to grow each year. Most of the activities were devoted to training for members and high school counselors. The first week-long workshop for new aid officers was conducted in 1972. This was continued for three years, then discontinued since the Mid-West Association’s Annual Workshop fulfilled the need for neophyte training.
One of the more significant contributions to training was the development of the first Chief Executive Officers Financial Aid Workshops ever held in the United States in 1978. The Chancellor of the Board of Regents of the State of New Jersey, the Executive Director of NASFAA, and a Vice President of Student Affairs from the University of South Carolina comprised the faculty of the workshop for Presidents and Chief Students Personnel Officers of colleges and universities throughout West Virginia. The organizers of the workshop received the cooperation and assistance of the Chancellor of the Board of Regents. The meeting had all public and private student personnel representative in attendance and all presidents but one, representing a private college. The program was expanded on a national scale and sponsored by NAUBO and NASFAA. Other significant training activities included the development of a policy and procedures manual by one of our financial aid officers (Ken Sears, our 1985/86 President) that was used to assist in the development of the NASFAA policy and procedures manual.

Our membership classification was expanded in the early eighties to include regular (practicing aid officers) and associated (individuals not at educational institutions or state agencies) categories.

As of 1985; three of our past presidents are Directors of Financial Aid in other states, Michigan and Missouri. Two of our former presidents are executives, one with Sallie Mae and another with WVELS. One has returned to the ministry. One works as an executive for a large Stafford Loan lender. Six are in other areas of education on campuses; eleven are still in financial aid.

In 1985, through the effort of Neil Bolyard, the Association incorporated so that should any issues of legal liability arise, it would be the organization that was responsible as opposed to the officers and individuals. In September 1986, Ken Sears, at the direction of the membership, in order to clarify our tax status and in preparation for the 1987 MASFAA conference, applied for and obtained tax exempt status for WVASFAA.

In October 1987, under the leadership of Elaine Chiles, WVASFAA had the honor of hosting the MASFAA Annual Conference at the Charleston Civic Center and Charleston Marriott Hotel. This was no ordinary MASFAA conference as it was a celebration of MASFAA’s twenty-fifth anniversary. It was a great conference and an accomplishment in which our Association can certainly take pride.

In October 1992, the Association conducted its 25th Anniversary Celebration at the Charleston Marriott following the 6th running of the Collegiate Chase, a 5-mile road race to encourage college attendance and to raise money for scholarships that was started in 1987 at MASFAA’s 25th Anniversary Celebration.

As of October 1992; eleven of the past presidents remain active in Financial Aid offices, eight in West Virginia, with one each in Michigan (M.S. McCann), Ohio (Carolyn Sabtino), and Missouri (Jo Ann Hunt). Two have retired, Jack Conrad and Dick Reese. Frank Julian is a professor at Morehead State in Kentucky, Tom Hillyard is in Admissions at Marietta College, Ohio. Nate Jackson has a Ford Agency in Elkins. Dennis Montrella works with Society Bank in Cleveland, while Dencil White continues with Sallie Mae in Washington, D.C. Elaine Chiles (twice past president) heads the WVELS office in Charleston. Phil Sutphin is Dean of Instruction at a community college in Mississippi. Bud Hall is in Student Affairs at Wheeling Jesuit, and Nora Hart works in the health profession in Beckley.

Of the 23 past presidents, 17 attended the 25th anniversary party. All were present except David Palmer, Jack Conrad, Frank Julian, Joe Summers, Jo Ann Hunt, and Phil Sutphin.
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Welcome to West Virginia Association of Student Financial Aid Administrators

2017 Spring Conference

**Conference Registration:**
Conference registration is in the Aspen Area of Canaan Valley Resort, 230 Main Lodge Road, Davis, WV. Registration is open 10:00AM – 3:00PM on Wednesday, April 26, 2017 and 8:00AM – 3:00PM on Thursday, April 27, 2017. If your arrival is outside of these time frames, please seek out Jeanie Spitznogle, WVASFAA Treasurer.

**Name Badges:**
Name badges are required for admission to all conference sessions, meals and conference related functions. If you misplace your badge, visit the WVASFAA registration area during registration hours or contact Jeanie Spitznogle, WVASFAA Treasurer.

**Exhibitors:**
Be sure to visit the WVASFAA Exhibitors located in the Aspen Area.

**Dress:**
Dress for the Conference is business casual.

**Etiquette:**
Please refrain from talking during presentations or near the doorways of the session locations while sessions are taking place. Turn off electronic devices or select to have them vibrate while in attendance during sessions.

**Hotel Information:**
Canaan Valley Resort, 230 Main Lodge Road, Davis, West Virginia, 26260
Check-in time begins at 4:00PM and check-out is at noon. Late check-outs may be requested by dialing ext. 6797 from your guest room.

**In Room Amenities:**
Complementary high-speed internet access (WIFI) is available in all guest rooms, hotel public spaces and meeting rooms. 37” Flat screen TV’s, AM/FM alarm clock radio, hairdryer, iron and ironing board, individual climate control, refrigerator, microwave and coffee maker. No smoking or pets allowed in guest rooms.

**Resort Amenities:**
The Beech Club offers an indoor heated pool, whirlpool spa, fitness center and sauna, arcade, gift shop, golf clubhouse, golfing and sporting clay range.
2016-2017 WVASFAA Executive Board

Katie R Cooper, President
Director of Financial Aid
West Liberty University
Phone: (304) 336-8131
katie.cooper@westliberty.edu

JoAnn L Ross, President-Elect
Director of Financial Aid
WV State University
Phone: (304) 204-4361
jross15@wvstateu.edu

Kathy J Bialk, Past President
Director of Student Financial Assistance
Marshall University
Phone: (304) 696-2281
bialkk@marshall.edu

Danielle M Duvall, Secretary
Financial Aid Counselor
Shepherd University
Phone: (304) 876-5728
dduvall@shepherd.edu

Jeanie W Spitznogle, Treasurer
Financial Aid Counselor
Fairmont State University
Phone: (304) 367-4838
jspitznogle@fairmontstate.edu

Matthew P Nettleton, Associate Member Representative
Strategic Business Director
Inceptia
Phone: (260) 578-6157
mattn@inceptia.org

Thomas C Baker, Auxiliary Member Representative
Senior Vocational Rehabilitation Counselor
WV Division of Rehabilitation Services
Phone: (304) 647-7515
thomas.c.baker@wv.gov

WVASFAA
2016-2017 WVASFAA Committees

**Spring Conference**
JoAnn Ross, Program Chair, West Virginia State University
Chester Priest, Site Chair, KHEAA
Carla Strawn, PNC Education Lending
Candi Frazier, West Virginia University

**Long Range Planning**
Carla Strawn, Chair, PNC Education Lending

**Nominations and Elections**
Kathy J. Bialk, Chair, Marshall University

**Membership/Newcomers Reception**
Alicia Nickolich, Chair, Fairmont State University

**Policies, Procedures, and Constitution & By-laws**
Candi Frazier, Chair, West Virginia University

**Awards**
JoAnn Ross, Chair, West Virginia State University

**Diversity and Inclusion**
Consuela Phillips, Chair, Valley College

**Financial Aid Training for Counselors**
Karen Martin, Chair, WV Higher Education Policy Commission

**Professional Development & Training**
Brian Weingart, Chair, WV Higher Education Policy Commission

**Social Outreach & Promotion**
Sarah Musgrave, Chair, Marshall University

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**Tuesday, April 25th, 2017**

6:00PM-7:00PM
**Executive Committee Dinner**
Location: Hickory Room

6:30PM-8:30PM
**Executive Committee Meeting**
Location: Hickory Room

**Wednesday, April 26th, 2017**

7:00AM-8:00AM
**Executive Committee Breakfast**
Location: Hickory Room

8:00AM-10:00AM
**Exhibitor Set-Up**
Location: Aspen Area

10:00AM-3:00PM
**Conference Registration**
Location: Aspen Area

11:00AM-11:45AM
**Newcomer’s Welcome Reception**—All Welcome!
Location: Spruce

12:00PM-1:00PM Lunch
**Welcome to our 50th Anniversary Luncheon**
Location: Maple/Balsam
Opening Remarks: Introduction of WVASFAA Executive Committee, Special Guests, and New Members
Speaker: Katie Cooper, West Liberty University
*Baked penne pasta with Italian sausage, onions & peppers, florentine ravioli with alfredo and stuffed manicotti with marinara, served with vegetable medley, garlic bread, garden salad, chef choice of dessert, coffee and ice tea.*
WVASFAA Spring Conference Agenda

1:00PM-2:00PM Opening Session:

**Washington Update**

Location: Maple/Balsam  
Presenter: Megan McClean Coval, NASFAA  
Moderator: Katie Cooper, West Liberty University

This NASFAA Federal Update will provide a high level landscape of the Washington political climate with a particular focus on federal financial aid policy over the past year and how it has impacted students and institutions. Overall trends in student aid will be discussed including an overview of reauthorization proposals and predictions for how student aid funding will fare in the upcoming years. The session will also provide an overview of NASFAA-led projects, services, and advocacy efforts.

2:00PM-5:00PM Exhibits Open  
Location: Aspen Area

2:00PM-2:30PM Break  
Don’t Forget to Visit with our Exhibitors!  
Location: Aspen Area

2:30PM-3:30PM Interest Sessions:

**FA 101 - Financial Aid Basics**  
Location: Elm  
Presenter: Danielle Duvall, Shepherd University  
Moderator: Chris Baker, WV Division of Vocational Rehabilitation Services

Are you a Vocational Rehabilitation Counselor or Bursar/business officer who wants a better understanding of financial aid? Are you new to the financial aid profession? We will examine a broad overview of the financial aid process and allow time for questions and answers at the end.

**Required Eligibility Updates to Department of ED (PPA and ECAR)**  
Location: Spruce  
Presenter: Thomas Ratliff, MASFAA President, Indiana Wesleyan University  
Moderator: Susan George, West Virginia Wesleyan College

They don’t need updating very often, but when they do it really matters and it normally all rests on the Financial Aid leader’s shoulders. Come learn about the requirements and share some best practices associated with updating your institution’s contractual agreements necessary for Title IV Aid eligibility: Program Participation Agreement (PPA) and Eligibility and Certification Approval Report (ECAR).

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**Don’t forget to stop by the Hospitality Suite!**
Working with Millennials and Beyond
  Location:  Willow
  Presenter:  Joe Fries, Sallie Mae
  Moderator:  Consuela Phillips, Valley College
  Millennials are the largest generation on our planet today. As a result, they will have a tremendous influence over norms, expectations and behavior. This session will highlight the financial and buying habits and expectations of millennials and will review some recommendations in engaging them. This session will also touch on the emerging Generation Z influences and behaviors.

3:30PM-4:30PM Interest Sessions:
  Protect Yourself Professionally:  What Not to do on Social Media
    Location:  Spruce
    Presenter:  Sarah Musgrave, Marshall University
    Moderator:  Melissa Smith, West Virginia Rehabilitation Center
    Social media is fun. Social media is a great way to connect and re-connect. Social media is a platform for information sharing and voicing your opinions. Social media is public and there can be backlash. This session will point out behavior that could have professional repercussions.

  Degree Pursuant Courses; Impact on Financial Aid Eligibility
    Location:  Willow
    Presenter:  Sandra Oerly-Bennett, West Virginia University
    Moderator:  JoAnn Ross, West Virginia State University
    With the release of Banner 8.29, institutions will have a mechanism to determine which courses are degree pursuant. This session will include a discussion of the potential impact for federal and state programs, how college courses completed while in high school, dual degree, double majors, 3+2 and 4+1 programs may impact eligibility and the challenge of communicating this change to students and your institution.

  Clock Hour Issues
    Location:  Elm
    Presenter:  Diann Clothier, Student Financial Aid Consultant
    Moderator:  Charlotte Lake, United Technical Center
    Join with your colleagues from other clock hour schools for an open forum on issues related to clock-hour institutions. Don’t forget to bring questions and topics you would like to discuss.

5:00PM Evening Event
  Pizza Party
    Location:  Maple/Balsam
    Presentation of NASFAA Credentials, Privilege Walk Exercise, Un”wine”d with your colleagues after a long day of training. Don’t forget to stop by the Hospitality Suite!
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Thursday, April 27th, 2017

7:00AM-8:30AM Breakfast

**Breakfast Buffet**

- Location: Maple/Balsam
  
  *Scrambled eggs, breakfast potatoes, bacon or sausage, sausage gravy, fresh biscuits, assorted danishes, assorted cereals, orange juice, coffee, tea and milk.*

8:00AM-3:00PM Conference Registration Open

- Location: Aspen Area

8:00AM-12:00PM Exhibits Open

- Location: Aspen Area

8:30AM-9:30AM General Session:

**West Virginia State Update**

- Location: Maple/Balsam
- Presenter: Brian Weingart, WV Higher Education Policy Commission
- Moderator: Tom Ilse, Bluefield State University

One of our favorites is back to provide us with an update on what is happening in Charleston with state level programs. Hold on to your seats this may get interesting.

9:30AM-9:45AM Break

**Don’t Forget to Visit with our Exhibitors!**

- Location: Aspen Area

9:45AM-10:45AM Interest Sessions:

**Administrative Capability**

- Location: Spruce
- Presenter: Kathy Bialk, Marshall University
- Moderator: Chad Halstead, WV Division of Vocational Rehabilitation Services

This session focuses on administrative capability provisions and examines what a school should do to demonstrate its continued compliance as a participant in the Title IV Programs. In addition, this session is designed with the necessary tools, equipment and subject matter expertise to assist you through understanding and applying administrative capability. Participants will receive a voucher for the associated credential test complimentary.

Don’t forget to stop by the Hospitality Suite!
Legislation, Regulations and You
Location: Willow
Presenter: Megan McClean Coval
Moderator: Raina Chezem, ELM Resources
Wondering about the differences between legislation and regulation? How are each made, governed, and enforced? How do they impact the day-to-day work you do as a financial aid administrator? This session will provide a “101” on development and implementation of legislation and regulation, and how it pertains to you and your role!

Providing the Best Service to Students with Disabilities
Location: Elm
Presenter: Mary Ellen Schubert, Davis & Elkins College
Moderator: Hannah Lilly, WV Division of Rehabilitation Services
This session will include an overview of the ADA as amended 2008 and provide practical counseling techniques and strategies that you can use to work with students with disabilities to provide them with the best customer service experience.

10:45AM-11:45AM Interest Sessions:
Cash Management
Location: Spruce
Presenter: Tresa Weimer, Fairmont State University
Moderator: Alicia Frey, West Virginia Northern Community College
This session provides an overview of the various methods for drawing down Title IV funds and the program-specific requirements for disbursing federal aid. You will also be introduced to cash management notification and authorization requirements. Participants will receive a voucher for the associated credential test complimentary.

Don’t Judge a Book by Its Cover
Location: Willow
Presenter: JoAnn Ross, WV State University & Consuela Phillips, Valley College
Moderator: Sharon Howard, WV School of Osteopathic Medicine
We encounter the word “diversity” in many different ways within our work lives. But what judgments do we really make and what leads us into forming these opinions? Come join this interactive session that uses three different exercises to help you identify your own judgment patterns and how this might impact your work life.

Don’t forget to visit our Exhibitors!
Comment Code 399/Resolving Conflicting Information
Location: Elm
Presenter: Megan Nicholson, West Virginia University
Moderator: Julie Leach, Huntington Junior College
Comment code 399s can be confusing. This session will provide guidance on when a Comment Code 399 will be generated, what to do to resolve and the potential impact to the student.

12:00PM-1:30PM Lunch
Luncheon
Location: Maple/Balsam
Virginia baked ham, oven roasted turkey breast, roast beef and salami topped with cheddar, swiss or provolone, lettuce, tomatoes, sliced onions and pickle spears, assorted breads, rolls, cole slaw, chef choice of dessert, iced tea & coffee.

MASFAA Update
Presenter: Thomas Ratliff, MASFAA President, Indiana Wesleyan University
Moderator: Katie Cooper, West Liberty University
Presentation of MASFAA State Leadership Award & 50 Seconds for the 50th-Spotlight on Our Exhibitors.

1:30PM-5:00PM Exhibits Open
Location: Aspen Area

1:30PM-2:30PM Interest Sessions:
R2T4
Location: Spruce
Presenter: Mary Blizzard; Bridge Valley, Eastern, & Mountwest Community & Technical Colleges
Moderator: Tiffany Haynes, West Virginia State University
This session provides an overview of the provisions and examines how to handle a student's Title IV funds when they withdraw from school before completing the payment period or period of enrollment. Participants will receive a voucher for the associated credential test complimentary.

Effectively Preparing Students for Repayment
Location: Elm
Presenter: Eric Meadows, West Virginia University
Moderator: Kathy Bialk, Marshall University
According to a survey conducted by Brookings in 2014, just 38 percent of students with loans were able to identify how much they had borrowed. Nineteen percent underestimated the amount they borrowed. How can aid administrators help educate students on the impact of borrowing? This session will provide helpful tips and initiatives that one school is doing to help educate students on student loan borrowing and repayment processes.
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Banner Bits and Bytes
Location: Willow
Presenter: Dianne Sisler, WVNET & Nadine Hamrick, Marshall University
Moderator: Jeff Scott, West Virginia University at Parkersburg
Get the latest update from the Ellucian Conference from Dianne and Nadine, including the new release of 8.29, program of study and self-service reimagined.

2:30PM-2:45PM Break
Don’t Forget to Visit with our Exhibitors!
Location: Aspen Area

2:45PM-3:45PM Interest Sessions:
Consumer Information
Location: Spruce
Presenter: Mary Blizzard; Bridge Valley, Eastern, & Mountwest Community & Technical Colleges
Moderator: Debbie Turner, Concord University
This session goes through what an institution's disclosure and reporting disclosures are, when and how reports and disclosures are to be made, as well as best practices for compliance with consumer information regulations. Participants will receive a voucher for the associated credential test complimentary.

How to Effectively Jump Start New Financial Aid Employees
Location: Elm
Presenter: Thomas Ratliff, MASFAA President, Indiana Wesleyan University
Moderator: Alisha Nickolich, Fairmont State University
This session will offer attendees insight in to how to effectively integrate new employees in the current office dynamic and make them feel welcomed, wanted, and as though they belong to the existing Financial Aid Team from their very first day. Additionally, this session will focus on developing an efficient and effective training program for new hires.

Loan Rehabilitation: A Second Chance for Borrowers
Location: Willow
Presenter: Candi Frazier, West Virginia University
Moderator: Lake Tackett, Huntington Junior College
The consequences of student loan default can be devastating to your borrowers. Do you know how to educate them about ways to rehabilitate their loans after default? This session will provide you with a better understanding of the process for rehabilitating loans after default.

Don’t forget to stop by the Hospitality Suite!
3:45PM-4:45PM Sector Breakout Sessions:

**2 and 4 Year Public Institutions**
Location: Spruce
Facilitator: Tresa Weimer, Fairmont State University

**Community & Technical Colleges**
Location: Willow
Facilitator: Trish Harmon, New River Community & Technical College

**Private Colleges**
Location: Front of Maple/Balsam
Facilitator: Susan George, West Virginia Wesleyan College

**Clock-hour Schools & Colleges**
Location: Elm
Facilitator: Charlotte Lake, United Technical Center

**Associate Members**
Location: Aspen Area
Facilitator: Matt Nettleton, Inceptia

**Auxiliary Members**
Location: Back of Maple/Balsam
Facilitator: Chris Baker, WV Division of Vocational Rehabilitation Services

5:30PM Evening Event
**Cocktail Hour and 50th Anniversary Dinner**
Location: Maple/Balsam
Florentine stuffed flank, herb roasted chicken, tossed salad, fresh seasonal vegetable, rolls, butter, coffee, ice tea and chef choice of dessert.
Presentation of Awards, Recognition of Years of Service, 50th Anniversary Slide-Show, Silent Auction, Raffle for Door Prizes, Introduction of Past Presidents & Special Guests, Celebration Toast.

Until 11:00PM
**DJ - Dance and Karaoke**
Location: Laurel Lounge
Friday, April 28th, 2017
8:00AM-9:00AM Breakfast

Breakfast Buffet
Location: Maple/Balsam
Scrambled eggs, breakfast potatoes, bacon or sausage, sausage gravy, fresh biscuits, assorted danishes, assorted cereals, orange juice, coffee, tea and milk.

9:00AM-10:00AM General Session:
Federal Update
Location: Maple/Balsam
Presenter: Craig Rorie, US Department of Education
Moderator: JoAnn Ross, West Virginia State University
This session will cover information on current issues for Title IV student aid programs; including updates on the Department’s activities and initiatives and any on-going and upcoming regulatory efforts.

10:00AM-10:45AM Closing Session:
Business Meeting
Location: Maple/Balsam
Presenter: Katie Cooper, WVASFAA President, West Liberty University
WVASFAA Members general business meeting, Passing of the Gavel, Announcement of door prize winners and silent auction winners.

10:45AM-11:00AM
Hotel Check-out
We look forward to seeing you at the next conference, drive safely!

Save the Date and please join us for the 2017 Fall WVASFAA Conference on November 1st-3rd, 2017 at Four Points Sheraton, Charleston, WV.
cuLearn is a network of credit unions that offers student loan solutions.

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We are thankful for our Exhibitors!

Stop by the Aspen area to say hello.