



FINANCIAL AID LEADERS CONFERENCE

Advancing Biblical Higher Education for Kingdom Impact

PROGRAM SCHEDULE
MARCH 27-28, 2025

PRESENTERS: PATRICIA WILLHITE, SENIOR MANAGER (TX) | CAPINCROUSE
LISA SAUL, PARTNER AND UNIFORM GUIDANCE DIRECTOR (TX) | CAPINCROUSE

CONFERENCE OVERVIEW: The accurate and timely processing of institutional financial aid is a vital part of institutional effectiveness. Staying informed on changes in federal guidelines is not optional. Staying in compliance is vital. Survey the financial aid landscape with experts who can help you stay abreast of crucial information and keep you institution in safe waters.

THURSDAY | MARCH 27

9:00 — 9:15

WELCOME AND INTRODUCTIONS — DAVID MEDDERS, EXECUTIVE VP | ABHE

9:15 — 10:00

SESSION 1: FIDUCIARY RESPONSIBILITY

Overview: The US Department of Education communicates expectations of Federal Student Aid participants through regulations and the Program Participation Agreement. In this session we will discuss the fiduciary responsibility of management and governance as it relates to administration, compliance, and reporting. Participants will gain an operational understanding of:

- ▶ Basic requirements of program participation agreement
- ▶ Administrative capability
- ▶ The difference between exceptions v findings
- ▶ ED program reviews

10:00 — 10:30

Q & A DISCUSSION

10:30 — 10:45

REFRESHMENT BREAK

10:45 — 11:30

SESSION 2: BEST PRACTICES

Overview: The objective of a Student Financial Aid office is to distribute student aid efficiently and remain compliant with the PPA and regulations. In this session we will look at policies, practices, and procedures followed by high performing institutions. Participants will learn best practices and experiences from practicing professionals relating to:

- ▶ Professional resources
- ▶ Established processes and reviews
- ▶ Adequate resources
- ▶ Support from leadership

11:30 — 12:00

Q & A DISCUSSION

12:00 — 12:15

A WORD FROM OUR SPONSOR — CAPINCROUSE

12:15 — 1:00

LUNCH — CATERED IN THE ABHE DINING ROOM

1:00 — 1:45

SESSION 3: THINGS TO AVOID

Overview: Administering student financial aid programs can be complex and laborious. Regulations are voluminous and change regularly. Yet the top 10 findings are generally predictable and reoccurring. In this session we will look recurring reported findings identified by experienced auditors and the Top Ten Audit Findings as reported by FSA and the letters from ED describing required actions. Participants will be able to identify common findings and their root causes.

- ▶ Return to Title IV
- ▶ Third party recruiting
- ▶ Mandatory and discretionary triggers
- ▶ Letters from ED

1:45 — 2:15

Q & A DISCUSSION

2:15 — 2:30

REFRESHMENT BREAK

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THURSDAY | MARCH 27 (CONT'D)

2:30 — 3:15

SESSION 4: LEVERAGING A THIRD-PARTY SERVICER

Overview: Many higher education institutions supplement Student Financial Aid staff with third-party servicers. In this session we will consider practices and procedures utilized by institutions who leverage third-party servicers resources effectively. Participant will learn:

- ▶ Vendor selection
- ▶ Collaboration and clear delineation of responsibilities
- ▶ Protecting PII when using a third party
- ▶ ED's consideration

3:15 — 3:45

Q & A DISCUSSION

3:45 — 4:00

WRAP-UP

4:00 — 5:00

REFRESH & RELAX — HILTON GARDEN INN

5:00 — 6:30

DINNER OFF SITE

FRIDAY | MARCH 28

9:00 — 9:15

INSIGHTS FROM THE WORD | DAVID MEDDERS

9:15 — 10:00

SESSION 5: UNDERSTANDING A UNIFORM GUIDANCE AUDIT

Overview: Audits of federal financial assistance programs administered under Uniform Guidance are required of institutions administering Federal Student Aid. These audits are technical and compliance oriented. In this session, professional independent auditors will explain the process and share best practices to follow in preparing for a Uniform Guidance Audit. Participants will learn how to:

- ▶ Preparing each day
- ▶ Develop and complete interim checklists
- ▶ Develop and complete annual close checklists

10:00 — 10:30

Q & A DISCUSSION

10:30 — 10:45

REFRESHMENT BREAK

10:45 — 11:30

SESSION 6: BREAKING NEWS ROUNDTABLE

Overview: Current events often directly or indirectly affect higher education and the public's perception of the value of a college degree. In this session we will explore current events and the impact on enrollment and need for financial aid during the remaining spring 2025 term and fall 2025. Participants will discuss:

- ▶ 2024 election results
- ▶ Rollout of FVT, GE, and related party transactions regulations
- ▶ Demographic shifts
- ▶ Open discussion

11:30 — 12:00

Q & A DISCUSSION AND WRAP-UP

12:00 — 1:00

CLOSING LUNCH — ABHE DINING ROOM

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