

# Financial Aid Leaders Forum

February 11, 2026

Sponsored by — Capin Crouse

Presenters — Patricia Willhite and Lisa Saul



## ***Sharpening Your Edge for Effective Leadership of Financial Aid***

**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 your institution in safe waters.



**7:00 – 8:00 Forum Breakfast — Regency Foyer**

**8:00 – 8:15 Welcome & Introductions**

### **8:15 – 9:30 Session 1: Fiduciary Responsibility**

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 and reportable findings
- Top findings in student financial aid auditing
- ED program reviews

**9:30 – 10:15 Refreshment Break — Regency Foyer**

### **10:15 – 11:45 Session 2: Understanding a Uniform Guidance Audit**

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:

- Prepare each day as a whole institution
- Develop and complete interim and annual closed checklists
- Internal audits
- Key Items to avoid
- Focus on institutional data security

**11:45 – 12:00 A word from our Sponsor**

**12:00 – 1:00 Buffet Lunch — Regency Foyer**

### **1:00 – 2:15 Session 3: Breaking News Roundtable**

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 2026 term and fall 2026. Participants will discuss:

- Audit threshold impacts
- Changes in loan amounts
- Impacts of budget adjustments from the government
- Demographic shifts
- Open discussion

**2:15 – 3:00 Refreshment Break — Regency Foyer**

### **3:00 – 4:15 Session 4: Putting Together the Puzzle Pieces**

The objective of the institution is to educate future leaders. This requires a cohesive collaboration between departments to effectively accomplish the mission. In this session, participants will discuss:

- Professional resources to gain knowledge
- Departmental integration strategies
- Adequate resource requirements
- Cohesive vision

**4:15 – 4:30 Wrap Up**

**6:00 – 8:30 Connections Dinner — Ballroom B/C/D**

Thanks to Our Sponsor

