



FERPA FOR ADVANCEMENT: TRAIN YOUR WHOLE SHOP

April 18, 2017 :: 1:00 - 2:30 p.m. EDT

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Avoid costly mistakes by understanding how to share information under FERPA guidelines.
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OVERVIEW

Train your entire shop on important FERPA regulatory obligations to protect your institution from civil liability, negative publicity, and possible exclusion from federal aid programs. This program will cover:

- Which general shop information is covered under FERPA regulations
- How to determine if a particular piece of shop information is covered or exempt
- How the regulations have changed your shop's obligations
- Case studies for particularly troubling, yet common, information
- How the FERPA requirements fit into your greater regulatory obligations

Every staff member needs to be trained on FERPA. Add the recording to your training library to train new hires and give veteran fundraisers a refresher.

WHO SHOULD ATTEND

All U.S. advancement stakeholders who retrieve and/or use alumni data will benefit from attendance. Novice participants will leave able to ensure that all FERPA requirements are addressed in every data request. Decision-makers will walk away with key information to consider when forming shop policy. Both groups will gain from a discussion of common shop information issues through a case-study format.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/webcast/ferpa-advancement-train-your-whole-shop-april-2017



LEARNING OUTCOME

After participating in this online training, you will be able to comply more effectively with FERPA regulations in your advancement shop.

CONTACT US FOR MORE INFORMATION

Contact David Boggs, Associate Program Manager David.Boggs@academicimpressions.com or 720-988-1215 if you'd like additional information about the program.

AGENDA

Tuesday, April 18, 2017 :: 1:00 - 2:30 p.m. EDT

- ➔ **FERPA Definitions**
- ➔ **How Does FERPA Apply to Advancement?**
- ➔ **The Five Key Provisions to Know**
 - Excluded from the education record
 - Directory information
 - Legitimate educational interest
 - In connection with financial aid
 - Written consent
- ➔ **Other Important Considerations**
 - The definitions of “attendance” and “no longer a student”
 - Clarification of parental disclosures
 - Identification and authentication of identity
 - Data sharing
- ➔ **Looking at the Big Picture: Case Study Example**
- ➔ **Takeaways: Your Regulatory Obligations and Ethical Standards**



INSTRUCTOR

Alan S. Hejnal, Team Member, Best Practices in Records Management, Association of Advancement Services Professionals

An advancement professional for twenty-five years, Alan brings extensive experience to the subject of standards related to records management, gift recording and receipting, and reporting. Until recently he directed records management processes and data for the University of Oregon Foundation. Previously affiliated with institutions such as Claremont Graduate University, DePaul University, Marquette University, Gettysburg College, and the University of Richmond, he has managed efforts in gift processing, demographic data, reporting, and prospect research, has served as the liaison between advancement and information services, and has managed the implementation of advancement systems.

A regular conference speaker, Alan is the author of two chapters in the second edition of the CASE book, *Advancement Services: A Foundation for Fundraising*, and is a member of the Association of Advancement Services Professionals' Committee on Best Practices in Records Management.



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EARLY BIRD PRICING

Postmarked on or before April 11, 2017. After April 11, 2017, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

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