



Jenny Grist Mill, Plymouth, MA



Grace Trail, Plymouth, MA



Burial Hill, Plymouth, MA



Long Beach, Plymouth, MA



Leyden Street, Plymouth, MA

MASFAA 2021 CONFERENCE PROGRAM

WEDNESDAY, NOVEMBER 17TH

5:00 PM - 8:00 PM

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| Conference Registration and Vendor Set-Up | Foyer Atlantic Room |
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THURSDAY, NOVEMBER 18TH

7:00 AM - 1:00 PM

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| Conference Registration | Foyer |
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7:30 AM - 9:00 AM

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| Vendor Hours with coffee | Atlantic Room |
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8:00 AM - 9:00 AM

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| Breakfast | Ballroom |
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9:00 AM - 10:15 AM

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| Welcome & Opening Keynote | Ballroom |
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10:25 AM - 11:25 AM

Session 1

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|--|-----------|
| A. The New/Newer Financial Aid Administrators Tool Kit | Wampanoag |
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| B. Public Service Loan Forgiveness (PSLF): What's Changing, What's Staying the Same? | Standish |
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11:25 AM - 11:45 AM

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|--------------------------------|---------------|
| Break with Snacks/Vendor Hours | Atlantic Room |
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11:45 AM - 12:45 PM

Session 2

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|---|----------|
| A. Confidence, Conflicts, and Escalation Oh My! | Standish |
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|---|-----------|
| B. "You Don't Have to Do It All" – Part I | Wampanoag |
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| C. Best Practices in Comparing and Searching for Private Loans | Carver |
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12:15 PM - 12:45 PM

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|--------------|---------------|
| Vendor Hours | Atlantic Room |
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12:45 PM - 1:45 PM

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| Lunch | Ballroom |
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1:50 PM - 2:50 PM

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| NASFAA Federal Update | Ballroom |
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3:00 PM - 4:00 PM

Session 3

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|--|-----------|
| A. Discussing Cost: Simple Strategies to Reassure Families of your Institution's Value | Wampanoag |
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| B. Professional Judgement - Authority, Implementation, and Documentation | Standish |
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|---|--------|
| C. Advancing Your Career in Financial Aid | Carver |
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4:10 PM - 5:10 PM

Session 4

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| A. The 2020 Tax Return - Changes and Challenges in Financial Aid | Wampanoag |
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| B. Take Control of Your Projects | Carver |
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| C. Supporting DACA Recipients and Undocumented Youth in 2021 | Standish |
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5:10 PM - 5:20 PM

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| Charity Representative Introduction | Ballroom |
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5:10 PM - 7:00 PM

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| President's Reception and Awards (Cocktail Hour) | Ballroom |
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FRIDAY, NOVEMBER 19TH

7:00 AM - 10:00 AM

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|-------------------------|-------|
| Conference Registration | Foyer |
|-------------------------|-------|

7:30 AM - 9:00 AM

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| Breakfast | Ballroom |
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7:30 AM - 10:00 AM

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|--------------------------|---------------|
| Vendor Hours with coffee | Atlantic Room |
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9:00 AM - 9:15 AM

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| EASFAA Update | Ballroom |
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9:15 AM - 10:00 AM

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| Negotiated Rulemaking Update | Ballroom |
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10:10 AM - 11:10 AM

Session 5

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| A. Don't Take the Bait | Standish |
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| B. Understanding Credit & Private Student Loan Underwriting | Wampanoag |
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| C. A Win-Win - How To Develop Mutually Beneficial Vendor Relationships | Carver |
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11:10 AM - 11:25 AM

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| Break with Snacks/Vendor Hours | Atlantic Room |
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11:25 AM - 12:25 PM

Session 6

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| A. "You Don't Have to Do It All" – Part II | Wampanoag |
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| B. Lost in Translation: The Unspoken Challenges Faced by International Students in the US | Standish |
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| C. Equity in Aid | Carver |
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12:00 PM - 12:25 PM

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| Vendor Hours | Atlantic Room |
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12:25 PM - 1:25 PM

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| Lunch | Ballroom |
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1:35 PM - 2:35 PM

Session 7

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| A. RFI to a PLA and Everything In Between | Carver |
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| B. Getting Emotional About Money: The psychological impact of debt and tools to help your students cope | Standish |
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| C. Financial Education and Issues of Student Equity | Wampanoag |
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2:15 PM - 2:45 PM

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| Vendor Hours | Atlantic Room |
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2:45 PM - 3:00 PM

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| 50/50 Raffle and Closing Remarks | Ballroom |
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3:00 PM

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| Conference End | |
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MASFAA 2021 CONFERENCE PROGRAM

THURSDAY NOVEMBER 18, 2021

CONFERENCE WELCOME AND OPENING KEYNOTE

9:00 AM – 10:15 AM

Ballroom

The Art of Making Stuff Up: Building Companies and Cultures Through Improv



Norm Laviolette,
*Co-Founder/CEO/Executive Producer
of Improv Asylum and Laugh Boston*

Norm Laviolette is the co-founder of Improv Asylum and Laugh Boston, as well as CEO and Executive Producer for both organizations. For over 20 years, Norm has been an integral part of tens of thousands of shows, be it as an actor, director, or producer. A comedy entrepreneur, Norm leads Improv Asylum's national and global efforts in improv training, has helped launch multiple comedy clubs, and speaks around the world on improv, communication, and team building. Most recently, Norm opened Asylum NYC, a 150-seat comedy theater in Manhattan. Norm also jumped in the ocean for 365 days straight during the pandemic to raise money for artists hit hard by COVID. Norm's first book "The Art of Making Sh*t Up" was released in April of 2019.

In this session, Norm Laviolette not only talks about the art of improv, but demonstrates the techniques that professional improv comedians use to communicate, ideate and foster a culture of appropriate risk taking. Combining improv exercises with stories from 25 years in the comedy business, this interactive keynote will explore how purposefully going off script can lead to the innovations in both our careers and personal lives that we are all searching for.

SESSION BLOCK 1

10:25 AM – 11:25 AM

A – The New/Newer Financial Aid Administrators Tool Kit

*Presented by Cathy Kedski, Massachusetts Maritime
Academy*

Wampanoag Room

In this session we will explore resources, ways to connect with other FAO's, and general tips and tricks for newer folks to financial aid.

B – Public Service Loan Forgiveness (PSLF): What's Changing, What's Staying the Same

Presented by Betsy Mayotte, TISLA

Standish Room

The Public Service Loan Forgiveness program (PSLF) has proven to be challenging to many borrowers. As a result, the Department of Education has made several improvements over the past year and is working through negotiated rulemaking as we speak to make quite a few more significant changes. This session will outline the current rules, recent changes and what we can expect over the coming year.

SESSION BLOCK 2

11:45 AM – 12:45 PM

A – Confidence, Conflicts, and Escalation, Oh My!

*Presented by Julie Lawton, Cognition Financial and
Wynette Zuppari, Brown University*

Standish Room

The pandemic has left us all feeling a little rattled. In this session we will have fun discussing ways to bring our Confidence Back! Additionally, we will learn strategies to deal with escalated issues and approach intense customer situations.



(L-R) Saquish portion of Duxbury, Bug Light and boats overlooking Plymouth Bay, Plymouth, MA

MASFAA 2021 CONFERENCE PROGRAM

SESSION BLOCK 2

11:45 AM – 12:45 PM

B – “You Don’t Have to Do It All” – Part I

Presented by Sarah Bergeron, Assumption University and Monica Blondin, Assumption University (MASFAA Past President)

Wampanoag Room

Have you been looking to offer or expand a financial education program on your campus, but you do not feel comfortable presenting on the topics yourself? In this session, we will illustrate how you do not have to do it all yourself! Come hear from two seasoned financial aid professionals who have implemented well rounded financial education programs on their college campuses by tapping into external resources from community partnerships. During the session, attendees will hear from a few external community partners who present on financial education topics.

You will leave the session with a list of potential external community partners and their financial education topics which can be used to assist you in meeting your financial education program goals.

Make sure to attend part II of our session “You Don’t Have to Do it All” – Part II to learn about internal campus partnerships and their resources.

C – Best Practices in Comparing and Searching for Private Loans

Presented by Scott Orris, ELM Resources

Carver Room

Navigating the financial aid process can be a daunting task. Coming together as a financial aid community to share best practices, we can take a proactive approach in providing families with detailed information that will allow them to make an informed decision on a product that fits their specific needs. Come join us for this informative session as we take a look from the student and parent perspective when searching for a private loan. Group-share some key guidelines and tools to help your school develop a plan to move forward.

NASFAA FEDERAL UPDATE

1:50 PM – 2:50 PM

Inside the Beltway Update

Presented by Rachel Gentry, NASFAA

Ballroom

This NASFAA Federal Update will provide an overview of the latest happenings in Washington, including a high-level landscape of the current political climate in D.C. with a focus on federal financial aid policy and how it has impacted students and institutions in recent years. Overall trends in student aid will be discussed including recent legislative and regulatory activity, reauthorization proposals and predictions for how student aid funding will fare in future budget negotiations. Movement within the Department of Education concerning negotiated rulemaking and updates from Federal Student Aid (FSA) will also be discussed. The session will also provide an overview of NASFAA-led projects, services, and advocacy efforts. Lastly, while the COVID-19 pandemic is still in effect, updates related to funding or relief measures will also be covered.

SESSION BLOCK 3

3:00 PM – 4:00 PM

A – Discussing Cost: Simple Strategies to Reassure Families of your Institution’s Value

Presented by Maureen Fagen, Sallie Mae, and Stephanie King, Bay Path University. Moderated by Lisa Talbot, Sallie Mae

Wampanoag Room

Many students and families will consider financing a portion of their college education. In this session, Sallie Mae and a financial aid professional will discuss resources to help financial aid and student account professionals have an honest discussion about the college investment. Attendees will come away learning how to convey value beyond price, how families share in the responsibility to pay for education and building confidence to discuss payment strategies for student success.

MASFAA CONFERENCE 2021

SESSION BLOCK 3

3:00 PM – 4:00 PM

B – Professional Judgement – Authority, Implementation, and Documentation

Presented by Amy Staffier, Simmons University (MASFAA President Elect)

Standish Room

As financial aid professionals, we are allowed to make adjustments, on a case-by-case basis, to the cost of attendance or the values of the data items required to calculate the EFC. In this session we will discuss the authority we have and, through case studies, the various ways to use professional judgement to best help the students and families we work with.

C – Advancing Your Career in Financial Aid

Presented by Tony Erwin, Blue Icon Advisors, Donna Kendall, Bentley University, and Ebony Marsala, Boston College (MASFAA President)

Carver Room

Financial aid leaders are critical to achieving the enrollment goals at most institutions but there is a growing gap between supply and demand for qualified and engaged financial aid professionals to fill leadership roles. How do financial aid administrators prepare themselves for advancement? Do they focus on technical skills, compliance, and advanced degrees/certifications or soft skills and volunteerism? Join this panel discussion to explore the kinds of skills and experiences institutions are looking for when hiring or promoting for senior financial aid roles. The panelists will share their leadership journeys and will offer practical advice to help advance your career in financial aid.



Plymouth Town Square, Plymouth, MA

SESSION BLOCK 4

4:10 PM – 5:10 PM

A – The 2020 Tax Return – Changes and Challenges in Financial Aid

Presented by Robert Weinerman, Iron Bridge Resources Wampanoag Room

In this session we will look at the 2020 tax return and changes to the tax code that will change the way we review files for the 2022-2023 academic year.

B – Take Control of Your Projects

Presented by Wynette Zuppari, Brown University Carver Room

Many of us serve in a project management role, despite not being an official “project manager”. This has become more and more frequent in our operations due to limited resources. The use of project management software and tools play a huge role in boosting collaboration and workplace productivity. Join this session to learn some tips and tricks on planning, organizing, controlling and monitoring your projects. This includes use cases of various methods and tools.

C – Supporting DACA Recipients and Undocumented Youth in 2021

Presented by Jillian Glaze, Bunker Hill Community College

Standish Room

Students begin their college search unsure and in need of guidance. This is especially true for our students that are DACA recipients or may be in an immigration status that does not qualify them for federal or state aid. How can we, as financial aid administrators, help guide these students as they begin their college careers? Come learn some of the strategies that Bunker Hill Community College has put into place to help connect students to resources for paying for college, as well as resources for college success. Please bring your institution’s best practices to share with your colleagues!

MASFAA CONFERENCE 2021

FRIDAY NOVEMBER 19, 2021

EASFAA Update

9:00 AM – 9:15 AM

Presented by: Jim Anderson, Montclair State University (EASFAA President) and Shawn Morrissey, UMass Medical (EASFAA Past President)

Ballroom

In this information session, the EASFAA President and Past President will share all of the latest and greatest news from our regional association, EASFAA.

Negotiated Rulemaking 2021

9:15 AM – 10:00 AM

Betsy Mayotte, TISLA

Ballroom

This session will summarize the proposals being discussed during the current negotiations with the Department of Education. Learn how these could affect your institution and students.

SESSION BLOCK 5

10:10 AM – 11:10 AM

A – Don't Take the Bait

Presented by Scott Orris, ELM Resources

Standish Room

In this session, we will explore common hacks and scams including phishing, social engineering, and use of social media to exploit your personal information. Even though many people are targeted at home or in your personal social media accounts, the information these social engineers receive can carry over to the workplace and impact your customers. Join us as we explore ways to protect yourself through this interactive session.

B – Understanding Credit and Private Student Loan Underwriting

Presented by Donna Shelby and Jeff Bentley, Citizens

Wampanoag Room

Do you wonder what goes on behind the scenes when a student applies for a private student loan? Would your staff feel more empowered to discuss these loan options if they knew what is required in order to get approved? This session will dive into credit reports, credit scores, and all the other elements that make up loan underwriting.

C – A Win-Win: How to Develop Mutually Beneficial Vendor Relationships

Presented by Jim Anderson, Montclair State University (EASFAA President); Jennifer Trauman, College Ave Student Loans; Mark McGinnis, CampusLogic; and Tom Dalton, Edfinancial

Carver Room

Is there value in having relationships with your vendors? Should you be meeting with them? If so, how often? And what should you be talking about? What should you expect from them? And should they expect anything from you? How can you benefit from those relationships? Is there any benefit to your students?

Join us to discuss those questions and more as a panel of school administrators and vendors will discuss their interactions and relationships, as well as thoughts on their relationships. The purpose of this panel is to share insights into how to develop mutually beneficial relationships with vendors and make the most of the time spent with them.

SESSION BLOCK 6

11:25 AM – 12:25 PM

A – “You Don’t Have to Do It All” – Part II

Presented by Sarah Bergeron, Assumption University and Monica Blondin, Assumption University (MASFAA Past President)

Wampanoag Room

Have you been looking to offer or expand a financial education program on your campus, but you do not feel comfortable presenting on the topics yourself? In this session, we will illustrate how you do not have to do it all yourself! Come hear from two seasoned financial aid professionals who have implemented well rounded financial education programs on their college campuses by tapping into internal campus partners.

You will leave the session with a list of presentation topics and potential internal campus partners who can assist you in meeting your financial education program goals.

Make sure to attend part I of our session “You Don’t Have to Do it All” – Part I to learn about external community partnerships and their resources.

MASFAA CONFERENCE 2021

SESSION BLOCK 6

11:25 AM – 12:25 PM

B – Lost in Translation: The Unspoken Challenges Faced by International Students in the US

*Presented by Julie Moreno, MPOWER Financing
Standish Room*

Ever wonder how many international students come to the U.S. every year? What countries do these students come from? How do they get financing? International students coming to the U.S. face struggles such as culture shock, academic difficulties and financial distress. This session will shed light on these challenges and provide financial aid administrators with tools to assist their international students with overcoming these obstacles.

C – Equity in Aid

*Presented by Keisa Davis-Rezendes, Bunker Hill Community College and Jillian Glaze, Bunker Hill Community College
Carver Room*

Many schools have made the practice of equity in all areas an important cornerstone of institutional mission. This session will discuss the application of equity to the professional judgment review process at a large urban community college. It will discuss the thought process that led to the collection and review of 5 years' worth of professional judgment data. It will also describe how that data review inspired changes to professional judgment policies and practices in order to meet student needs at multiple levels.

SESSION BLOCK 7

1:35 PM – 2:35 PM

A – RFI to a PLA and Everything In Between

*Presented by Presented by Donna Shelby, Citizens and Jeff Bentley, Citizens
Carver Room*

Do you need to do an RFI or RFP in order to establish a list of recommended private student loan lenders? What is a PLA (Preferred Lender Arrangement) anyway? This session will dive into the rules and regulations of PLA's including the history of why these rules were established and what other schools are doing to ensure their students and families have easy access to private loan options.

SESSION BLOCK 7

1:35 PM – 2:35 PM

B – Getting Emotional About Money: The psychological impact of debt and tools to help your students cope

*Presented by Jennifer Trauman, College Ave Student Loans
Standish Room*

This session will focus on varying views of money management, how they're formed and the psychological impact of debt. We will discuss how to incorporate emotion into your counseling, how to connect students with available campus resources and money management strategies your students can implement during school and beyond graduation.

C – Financial Education and Issues of Student Equity

*Presented by Tami Gilbeaux, Inceptia
Wampanoag Room*

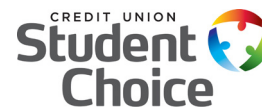
As financial education advances, we can see that not all financial conversations are created equal. Our students can face issues of social injustice or inequity, which may inhibit their ability to fully engage with our efforts. This intersectionality of finance and inequality makes it incumbent upon us to address these barriers to move the discussion forward.

Attendees will learn about issues regarding the gender pay gap, the racial wealth divide, and food insecurity and homelessness by reviewing: an overview of leading data and research; identification of issues of inequity pertaining to race, gender, and socioeconomic status; and ideas and implementation strategies for incorporating these topics into financial education programs.

50/50 RAFFLE AND CLOSING REMARKS

Ballroom

THANK YOU SPONSORS!



MISSION

The Massachusetts Association of Student Financial Aid Administrators empowers its members to be educated, engaged, and effective professionals.

VISION

To be recognized as a model for leadership in financial aid.

MASFAA.ORG