MASFAA Conference Agenda 2022

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*Wednesday, November 16, 2022*

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**2:00 PM – 5:00 PM**
**Pre-Conference Verification Credential**
*Sponsored by the MASFAA PD&T Committee*

**2:00 PM – 4:00 PM**
**Executive Council Meeting**

**4:00 PM – 7:00 PM**
**Vendor Set Up**

**4:00 PM – 6:00 PM**
**Registration Open**

**7:00 PM**
Lantern Ghost Tour of Plymouth
Are you haunted by R2T4s and IPEDS? Is Financial Aid not scary enough for you? Join us on an optional Ghost Tour of Plymouth at MASFAA this year!
*Meet in the Hotel 1620 lobby at 6:45 pm. Cost: $15 per person, in addition to conference fees*

*Thursday, November 17, 2022*

**7:30 AM**
**VENDOR TIME WITH COFFEE**

**8:00 AM – 9:00 AM**
**BREAKFAST**

**9:00 AM – 10:15 AM**
**CONFERENCE WELCOME & OPENING KEYNOTE**

**MASFAA Welcome**
**Presented by Amy Staffier, MASFAA President, Assistant Vice President, Enrollment Student Services & Director of Financial Aid, Simmons University**

**Facilitating Healthy Work in the "New Normal"**
**Presented by Judy Hu, Assistant Professor of Psychology at Roger Williams University**
Before the COVID-19 pandemic, teleworking (working remotely) was considered an alternative work option that some employers/organizations offered as part of their work-life balance practices. Since 2020, a large proportion of U.S. workers have transitioned into teleworking without systematic preparation, precedence, or a timeline for return/recovery. In addition, organizations have become more flexible with hybrid work arrangements, allowing employees to work from home at least one day a week. This "new normal" inevitably poses challenges to workers, such as how to "seamlessly" change our roles as we move from the kids' room to the work room, how to draw lines between work hours and nonwork hours. This talk will introduce two key topics: 1) the idea of *work-family interface,* understanding how individuals may differ in terms of how one sets their boundaries between different life domains, and how to respond to misalignment between one's preference of work-family boundaries and how organizations expect one to enact work-family boundaries; 2) the idea of "*always on" culture due to electronic connectivity,* understanding how communication technology has extended our work hours, and even encroached our family/life domains, and how to cultivate better technological behaviors on our own and also within our workgroups.

**10:30 AM – 11:30 AM CONCURRENT SESSION BLOCK ONE**

**Satisfactory Academic Progress: A Persistence and Retention Tool**
**Presented by: Tayler Kreutter, Executive Director of Student Financial Services, Mount Holyoke College**
Come to this session to hear about the relationship between satisfactory academic progress, appeals, and student persistence. Together we'll discuss ways in which institutions can: coordinate outreach campaigns that monitor and support the academic success of all students, initiate academic progress reports and coordinate outreach to students who are flagged as being at risk, develop tailored support

services for specific groups of students, and the benefits of viewing satisfactory academic progress in a holistic way.

**Policy Roundtable - New England State Policy Trends, and Practitioner Observations**
**Presented by: Betsy Mayotte, President, TISLA**
**Anika Van Eaton, VP, Policy, uAspire**
**Ellen Anderson, Senior Assistant Director of Financial Assistance, Clark University**
*MASFAA's Government Relations Committee shares the financial aid policy changes and higher education funding and policy trends from the federal level, Massachusetts, and across New England to share the state and regional policy context.* MASFAA Government Relations Committee is excited to hear the concerns, questions, and observations of challenges or successes of financial aid administrators to help shape the MASFAA Government Relations Committee's work in 2023 to share the unique perspectives on financial aid and college affordability with the Massachusetts Legislature and other policymakers. We will hear from a panel of various state experts about current and future trends in state and federal financial aid policy and then open the floor up to you to find out your most pressing issues that could be solved legislatively!

**Working with Difficult People - When You're the Difficult Person**
**Presented by: Mike Goodwin, Assistant Director of Student Financial Services, Williams College**
Customer service challenges have grown in our post-COVID world, reshaping our student's and their family's behaviors. With the advent of "Karens" and "Normans", these demands of your time have raised the bar with expectations of 24/365 availability, demand for personal connections and accommodations, and curbside pickups. Are you and your office keeping up or hanging up? This interactive, humorous, and practical session will examine how the customer service experience has changed. We'll categorize the personalities of difficult people, using childhood characters from the Hundred Acre Wood and come to recognize that a "Karen" is nothing more than Pooh's friend Rabbit with a tuition bill to pay. Most importantly, we'll discuss strengthening our listening and empathy skills to understand how we can better help our families feel heard and understood.

**What your student borrowers need to know about Employer Student Loan Repayment Assistance**
**Presented by: Gail Walker, School Relations Director, RISLA**
Employer Student Loan Repayment Assistance is a tax-free, financial wellness employee benefit offering assistance in helping employees reduce financial stress in the form of employer contributions towards outstanding student loans. This session will provide you with information you need to know on this new CARES Act benefit, so that you can make your graduating class aware of another avenue to help reduce their student loan debt. A survey of recent graduates indicated that over 76% were not aware that employers could help their employees repay their student loans as a tax-free benefit. 92% of those surveyed stated that they would stay with their employer at least 3-5 years if they agreed to help pay off a portion of their student loans. 100% feel this would contribute to their future financial wellness.

## 11:30 AM – 12:00 PM Vendor Break with Snacks

## 12:00 PM – 1:00 PM Concurrent Session Block Two

**Strategies for Communicating with Autistic Students**
**Presented by: Anne Shore, Coordinator, Disability Services/Student Accessibility Services, Quinsigamond Community College**
**Tami Strouth, Coordinator, Student Accessibility Services Quinsigamond Community College**
This workshop will review strategies for supporting and communicating with autistic, college students. We will discuss the unique learning and communication challenges that many autistic students experience, which may impact their interactions with other students and staff. Basic social conventions, including implied rules, nonverbal cues, and other subtleties in communication can be a mystery to them. These challenges can lead to problematic social relationships, conduct issues, academic difficulties, and confusions with navigating various institutional systems, such as financial aid. We will discuss these challenges and offer strategies to support their learning and college experience.

**Emergency Aid in a Post-HEERF World**
**Presented by: Kathy Anderson, Associate VP, Student Financial Services, Berklee College of Music**
HEERF has been a lifeline for many students who otherwise may have had to drop out during the pandemic. What happens on campuses and our students when HEERF is no longer available? This session will go through the planning happening at Berklee College of Music, and give attendees a chance to discuss their own campus circumstances.

**That Was Due When? The Importance of an Operational Calendar**
**Presented by: Tony Erwin, Principal Consultant, Blue Icon Advisors, NASFAA Consulting**
We've all been there: a missed deadline, bills being sent without notice, not knowing when grades will post so we can run SAP. But developing an operational calendar for financial aid-related functions can help you stay on top of these things like a boss. Learn the benefits of having an operational calendar, and discuss what to include and who to involve when creating your own.

**How America Pays for College 2022**
**Presented by: Annat Shrabstein, Director, Consumer Research, Sallie Mae**
Join us for a discussion of findings of "How America Pays for College 2022" - Sallie Mae's annual national research study. We'll discuss the range of funding sources families rely on to pay for college--from scholarships to 529s, and from federal grants to private student loans--and evaluate trends that impact decisions about how to pay.

## 1:00 PM – 1:45 PM Lunch with Cape Kid Meals Introduction
## MASFAA Business Meeting

### 1:45 PM – 2:45 PM Office of the Inspector General

**Presented by: Jeffrey Yung, Special Agent, Office of Inspector General, Department of Education**
**Mark Deckett, Special Agent, Office of Inspector General, Department of Education**

### 3:00 PM – 4:00 PM Concurrent Session Block Three

**FAFSA Simplification: Iceberg or lighthouse in the sea of change?**
**Presented by: Gail Holt, Dean of Financial Aid, Amherst College**
The simplified FAFSA and changes to Federal Methodology are arriving soon and will impact need analysis and packaging policies. Data-driven decisions need to be made prior to implementation. Whether using the FAFSA and/or alternative (CSS Profile or an institutional aid application) to collect applicant-level data, how will the student experience change and how will aid budgets be used consistently and equitably to award financial aid? Whether you represent a private or public institution, and regardless of the amount of your institutional aid budget, ensuring you understand the impacts of the changes is critical to meeting institutional enrollment goals and maintaining an equitable awarding process. This session will highlight one school's experience in using the NASFAA Student Aid Index (SAI) Modeling Tool and will encourage you to consider how your budget and packaging may shift, depending on your institutional profile. This session will not focus on software solutions.

**Designing a Delightful Student (aka Customer) Experience**
**Presented by: Caroline Menendez, Director, School Partnerships, Ascent Funding**
Let's strive to delight and inspire the students we serve! Join us for an interactive working where we will share actionable steps and tools to help you and your team deliver improved, exceptional student experiences.

**Tales From The Road**
**Presented by: Donna Shelby, VP Relationship Manager, Citizens**
How well do you know your lender/sales representative? This session takes a lighthearted look at a day in the life of a sales rep and how some days result in interesting tales from the road. Each rep will share a funny (and/or interesting) story that has blazed a memory for them. Too shy to circle around the vendor area? Meet your rep here and have a great laugh - on them!

### 4:00 PM – 4:15 PM Visit with Vendors!

### 4:15 PM – 5:15 PM Concurrent Session Block Four

**What is the middle? A look at the changing landscape of what is "middle class" and the potential implications for higher education and financial aid.**
**Presented by: Ebony Marsala**
This session will look at trying to define the middle class in today's economy. Who fits in this category? Do we have suitable and sufficient policies to help this population? What will happen to them as we move to a more simplified FAFSA?

**A Novel Idea**
**Presented by: Sarah Bergeron, Associate Director of Financial Aid and Enrollment Operations, Assumption University**
**Lauren Sullivan, Director of Financial Aid, Bentley University**
'*Educated*' by Tara Westover*s is a universal coming-of-age story that gets to the heart of what an education is, what it offers, and how it can transform us. But the journey also comes with the challenges of attaining an education through an unfamiliar system. Join us for a book club discussion around 'Educated' where we'll consider how the author's experience might apply to the work we do and how we might reevaluate our approach to working with students. We encourage you to read the book ahead of time and come prepared with your thoughts. We will have the questions ready, we just need your participation! **Please note: This book does have references to emotional and physical abuse, child neglect, and mental illness?*

**Creating a Customer Service Team within Student Financial Services: "Your SFS Solution Starts Here"**
**Presented by: Christina Folsom, Associate Director of Customer Service, Northeastern University**
**Yiyen Lee, Assistant Director of Customer Service, Northeastern University**
Creating a Customer Service Team within Student Financial Services that can adapt and thrive in today's changing higher education environment. Please join our session to hear about our unique customer service team. We will provide a brief introduction to our formation, explain what makes our team successful, discuss some challenges we have encountered, and discuss areas of opportunity in the future.

**Heads Up Communication**
**Presented by: Julie Lawton, Manager, Business Development, Cognition Financial**
This presentation emphasizes Communication Skills at Work. We will learn the importance of communicating with Diplomacy & Tact, as well as becoming an effective team member. If time permits, we will also review phone etiquette skills.

## 5:30 PM – 7:00 PM President's Reception and Awards

## 7:00 PM – 8:00 PM Trivia

*Friday, November 18, 2022*

### 7:00 AM Registration Opens

### 7:00 AM Morning Yoga

### 7:30 AM – 9:00 AM Breakfast

### 9:00 AM – 10:00 AM Keynote

**Presented by: Natalie K. Hodge**

The College Hustle: How students really pay for their education.

For years, higher education has been marketed as a way out of poverty, but for some students, it's an introduction. I've worked with students from middle class households who sign up for public assistance to make ends meet. Others barber, braid hair and of course the classic college hustle, write papers - all to access the American dream.

We are engaged in a nationwide discussion about college debt with much focus on a college graduate's experience. While those stories can be quite compelling, we have not yet begun to unravel the complex journey of what students do to stay in school. From sleeping in cars to working three jobs, students hustle their way to a diploma. The stories are inspiring and heartbreaking.

How do they make it? How can we support? Is our system a way or a way deeper into poverty for students with limited financial resources?

### 10:10 AM – 11:10 AM Concurrent Session Block Five

Guts Over Buts: Overcoming inner fear and outer resistance

**Presented by: Natalie Hodge, Writer, Producer and Owner of Rudy's Girl Media**

*Biggest BUT in the World* author Natalie K. Hodge became intimately aware of the power of excuses during her tenure as a student affairs professional at four different college settings across the country. While higher education pushes people to think deeply about academic endeavors and strategies for student success, it can also be a ripe space for fears to manifest into inaction, poor execution and less than desirable outcomes. In her session, Guts over Buts, Natalie will provide attendees with strategies for addressing their own fears and resistance from students and professionals who are caught in a never-ending cycle of excuses. The interacting and enlightening session will guide participants from root cause identification to excuse elimination. Attendees should be prepared to engage transparently.

**Withdrawals, Modules and the Financial Aid Professional**

**Presented by: Erika Callahan, Coordinator of Financial Aid, Northern Essex Community College**

This session will discuss R2T4 policies and procedures, in particular the financial aid office's responsibility when a student withdraws from classes offered in modules. We will discuss what defines a module course/program; how to determine if a R2T4 calculation is required, and steps in the R2T4 calculation. We will also discuss when a student needs to affirm attendance in a future module if withdrawn. Finally, we will examine and discuss module case studies.

**Introduction to the 2021 Tax Forms and Tax Code**

**Presented by: Robert Weinerman, Director of Training, Iron Bridge Resources, LLC**

If you have not looked at the 2021 tax forms yet, you are in for a surprise. The IRS had expanded all three numbered Schedules (Schedules 1, 2, and 3) and each of these is now a two-page form. Also, the IRS has added a lot of new lines, especially to Schedule 1, and some of these lines may (or may not be) includable on the FAFSA.

**Making Finance Fun: How To Get Students EXCITED About Money Management**

**Presented by: Peter Beilagus, Wealth Educators International , LLC**

A recent Associated Press poll revealed money management issues are the #1 reason students drop out of college. With inflation on the rise, students and parents alike are asking The Big Question: Is College Worth It? In this fun and informative session, money management expert Peter Bielagus serves up financial tips and tricks that financial aid professionals can slip into existing programs, initiatives, and even conversations to help students prosper and parents rest easy. Peter doesn't just push financial information across the table, he gets students excited about money management. He will share the exact techniques he uses when speaking to students and parents at over sixty colleges per year. Learn how to create "viral" financial education events on campus, easily address parent concerns, and avoid the number one mistake educators make with financial education.

## 11:10 AM – 11:30 AM Vendor Break with Snacks

## 11:30 AM – 12:30 PM Concurrent Session Block Six

**Judge, jury, and executioner. Eliminating unconscious bias in financial aid decision making and policies.**

**Presented by: Ebony Marsala, Director of Financial Aid, Boston College**

As aid administrators, we have exceptional flexibility in how we define various elements as a part of our process. We establish the cost of attendance, create policies, establish funding limits, create timelines all while trying to balance institutional priorities and staff capabilities. However, do we often think about how these various decisions create systems for inequities or hardships for the various people that we serve? This session will try to look at some of those areas where unconscious bias may play a role in the work we do, and what can be done to eliminate or reduce that bias.

**Making Financial Literacy Stick**

**Presented by: Tayler Kreutter, Executive Director of Student Financial Services, Mount Holyoke College**

Do you have a financial literacy program at your institution? Are you still trying to get the idea to "stick" with your students? Come to this workshop where we will follow the SUCCESs™ model provided by Chip and Dan Heath in their book Made to Stick. Using this framework, we will share ideas and brainstorm ways to create an engaged and motivated audience on your campus for financial literacy.

**Care & Feeding of Your Career**

**Presented by: Katrina Delgrosso, Head of Mid-Atlantic Campus & Event Development College Ave Student Loans**

Who is responsible for your career? Where do you begin to assess what you want and need? What should you do now? Is it time to make a move? How do you go about moving on? Join us for this informative session for anyone at any stage of their career to learn proven tips to take stock of your career and plan to take it to the next level.

**The Five Dysfunctions of a Team: Achieve team success by understanding the causes of organizational politics and avoiding its pitfalls**

**Presented by: Jeff Bentley, Relationship Manager, Citizens**

The Five Dysfunctions of a Team session will teach an actionable model that can be learned today and applied tomorrow to help any financial aid team become stronger. It addresses common hurdles to building a cohesive team, describes how know if you are on a dysfunctional team, and provides ways to begin the process of having a better team. Learning to have a better team is a simple yet not easy. Organizational politics, poor communication, lack of trust, and simply being human make having a strong team challenging.

### 12:30 PM – 2:00 PM Lunch with NASFAA Inside the Beltway Presentation

**Presented by: Rachel Gentry, Assistant Director of Federal & State Relations, NASFAA**

### EASFAA Update

**Presented By Anne Mcdermott, Easfaa President, Director Of Financial Aid, Salve Regina University**

### 2:00 PM – 2:15 PM Vendor Visits

### 2:15 PM – 3:15 PM Concurrent Session Block Seven

**Thinking about Income Adjustment Professional Judgments**

**Presented by: Robert Weinerman, Director of Training, Iron Bridge Resources, LLC**

When a student or student's family experiences a change in income, or has large amounts of one-time income in their AGI, they reach out to financial aid administrators and ask for accommodation. Financial aid administrators have the authority to make adjustments to the data elements in the FAFSA to account for these situations. Professional judgment is a powerful tool that can be stressful to use and document.

**"Director of Financial Aid" - What's not in the Job Description?**
**Presented by:**
**Tayler Kreutter, Executive Director of Student Financial Services, Mount Holyoke College**
**Ebony Marsala, Director of Financial Aid, Boston College**
**Amy Staffier, Assistant Vice President, Enrollment Student Services & Director of Financial Aid; MASFAA President**
Are you thinking about your career path and might want to be a Financial Aid Director? Join us for a panel discussion with a group of Director's who have all made the transition within the past several years. They will provide insights, humor, and tangible takeaways for you as you navigate your career in Financial Aid. We want you to walk away with a better sense of what the role can look like, how it can differ by school, and also what is not in the job description. There will be plenty of time to ask questions and interact with the panel as well!

**Guiding Families Through the Maze of Loan Options**
**Presented by: Stephanie Wells, Director of College Relations, MEFA**
How can your office guide students and families through the maze of college financing, help them avoid hitting roadblocks, and lead them out of the maze to pay their bill while minimizing debt? Families rely on guidance from their college about the best payment options. With so many options and features available, it can be confusing and overwhelming for families trying to navigate through the maze and make the best loan decision for them. Join us for a discussion on the key decision points families are facing when making a plan to pay the college bill. We will share resources, tools, and tips to dispel myths and help families make the best loan decision that is right for their unique circumstance.

## 3:15 PM – 3:30 PM Raffle and Closing Remarks

## 3:30 PM Conclusion: Time to Set Sail!