



## MASFAA Conference Agenda 2023

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*Wednesday, November 16, 2023*

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2:00 PM – 5:00 PM

### **Pre-Conference NASFAA Professional Judgment Credential**

**Presented by: Erica Lewis, Boston College & Mira Howell, Harvard University Kennedy School of Government**

**Emerson Room**

2:00 PM – 4:00 PM

### **Executive Council Meeting**

4:00 PM – 7:00 PM

### **Vendor Set Up**

**Ballroom Foyer**

4:00 PM – 6:00 PM

**Registration Open: Ballroom Foyer**

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*Thursday, November 16, 2023*

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

**8:00 AM – 9:00 AM BREAKFAST**

**9:00 AM – 10:15 AM**

**CONFERENCE WELCOME & OPENING SESSION**

**MASFAA Welcome**

**Presented by Jillian Glaze, MASFAA President; Senior Director of SFS Bunker Hill Community College**

**FAFSA Simplification Panel: [PLEASE CLICK SURVEY LINK BELOW TO PROVIDE QUESTIONS/FEEDBACK IN ADVANCE OF THE SESSIONS](#)**

**Panelists:**

**Laura Biechler, Bridgewater State University**

**Jillian Glaze, Bunker Hill Community College**

**Melissa Metcalf, Boston College**

**Jessica Sabourin, Worcester Polytechnic Institute**

Time to Simplify! Join us for a panel conversation on FAFSA Simplification.

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

**Artificial Intelligence (AI) and Machine Learning (ML): Financial Aid Office Friend or Foe?**

**Presented by: Karyn Wright-Moore and James "Jay" Burgess - Higher Education Assistance Group, Inc. (HEAG)**

Explore the benefits and risks of using Artificial Intelligence (AI) and Machine Learning (ML) technology in the administration and management of Financial Aid Programs. Consider how data elements from across the institution can be aggregated and analyzed to enhance service and compliance and proactively identify common audit findings like Conflicting Information or outdated Consumer Information. Understand the cross-functional requirements associated with the implementation of Artificial Intelligence and Machine Learning tools. This new-wave technology has the potential to transform the future of the Financial Aid Office. Knowledge is Power!

**Barriers and Biases commonly faced by Women in Higher Education. What Can Be Done to Provide More Support as More Women Seek Leadership Opportunities**

**Presented by: Valeria Harris, Harvard Graduate School of Education; Dr. Tracie Jones-Bennett, Deputy Director of the Institute for Equity and Community Office, MIT**

What can be done to provide more support as more women seek leadership opportunities. Women in higher ed are constantly managing barriers and biases that often may keep them in positions that does not align with their real talents and abilities. Higher education's history of excluding women contributes to the lack of diversity in its upper echelons of leadership, particularly at elite institutions. As a result, women seeking leadership opportunities not only need support and sponsorship, but also need to seek out self-care to take a holistic approach to feeding the mind, soul, and body.

**Reengaging Student Borrowers: Starting Over for the Best Possible Outcome**

**Presented by: Tami Gilbeaux, Inceptia**

As the resume repayment date draws closer, borrowers and schools will be dealing with a much different landscape of repayment than has been seen in past trends. The CARES Act has afforded some relief to all student loan borrowers by bringing them current and eliminating the need for payments. And, that's helping your CDR, for now. Understanding the ramifications of a mass resume date on student loan repayment can help you understand the impact it may have on your student borrowers and your school. In this express session, we will talk about the challenges this presents for students and schools along with recommendations on steps to take to ease the strain.

## **Level Up Your Customer Service**

**Presented by: Jeff Bentley, Citizens**

Create a positive office environment by understanding the importance of customer service and improving skills to deal with difficult scenarios.

**11:30 AM – 12:00 PM VENDOR BREAK WITH SNACKS**

**12:00 PM – 1:00 PM CONCURRENT SESSION BLOCK TWO**

## **The Impact of Mental Health on College Completion**

**Presented by: Maureen Fagen, Sallie Mae**

Four out of ten U.S. undergraduates never finish college. During this panel discussion, Sallie Mae will share findings from their recent How America Completes College research study on the mental health factors that impact a student's journey to college graduation. Our college and university panelists will share resources and support systems to identify and assist students of concern as they work towards achieving a college degree.

## **Combining Financial Aid and Admissions Offices**

**Presented by: Mira Howell and Katie Kelsall, Harvard University Kennedy School of Government**

This session will present the benefits of having one office that manages both admissions and financial aid. With many institutions moving towards a one-stop shop method for initial student questions, the trend to combine offices with a variety of functions is on the rise. Although there are many challenges as a result, even just combining admissions and aid can have significant benefits to the student experience and to building partnerships across a college or university. Some of the benefits discussed will include a better opportunity to balance admissions priorities with financial aid, honesty/transparency around financial fit, and improving the student experience. The transition from admissions to financial aid once a student is admitted can be jarring, so having roles that combine the two areas can be incredibly beneficial.

## **Working With Your Legal Team**

**Presented by: Monica Blondin, Assumption University**

Description to Come!

## **Beyond the College Bill: The Hidden Hurdles of Indirect Expenses**

**Presented by: Femi Stoltz & Anika Van Eaton, uAspire & A member of Benefits Trust Data**

New NPSAS data shows 4 million students are facing food insecurity nationally. With the focus on tuition and fees, students and families are often unprepared for the additional expenses they will encounter,

including school supplies, off-campus housing, transportation, and food outside of a meal plan. Join uAspire and Benefits Data Trust for a discussion on indirect expenses and meeting basic needs for low income students. Participants will explore uAspire's research on indirect expenses, learn about state-level initiatives to reduce campus food insecurity and discuss federal advocacy to increase benefits access for students. This session will highlight Benefits Data Trust's work to build institutions' capacity to find students who are eligible for SNAP and other public benefits through its new toolkit, as well as results from recent engagements with Maryland and Pennsylvania community colleges. Registrants will leave the session with a copy of uAspire's publication, "Beyond the College Bill" and Benefits Data Trust's "Benefits Access for Student Success: A Toolkit for Leveraging Data to Find Eligible Students".

#### **1:00 PM – 2:00 PM LUNCH WITH CHARITY INTRODUCTION**

#### **1:40 PM THE WILY NETWORK OVERVIEW PRESENTED BY: JUDI ALPERIN-KING**

#### **EASFAA UPDATE PRESENTED BY: DR. DANETTE BURGESS, EASFAA PRESIDENT**

#### **2:00 PM – 3:00 PM OVERVIEW OF CHANGES FOR THE 2024-2025 FINANCIAL AID CYCLE**

##### **Presented by: Robert Weinerman, Iron Bridge Resources**

We've been hearing about, studying, Zooming, and worrying about the impact of the FUTURE Act and the FAFSA Simplification Act for months now – and now it's actually happening. Let's take a broad overview of the two acts and how they are changing the way we will process federal applications going forward. We'll review the key changes made by the two acts, including the move from the Expected Family Contribution (EFC) to the Student Aid Index (SAI), changes to Pell Grant eligibility, and the impact of the transition from the IRS DRT to the FUTURE Act Direct Data Exchange (FADDX). We'll look at how the FADDX will impact V1 verification. And we'll review changes in the tax code and the use of tax returns as we move to tax year 2022 as the base year for 2024-2025.

#### **3:15 PM – 4:15 PM CONCURRENT SESSION BLOCK THREE**

##### **The 7 Disruptors to a Virtual Office and How to Overcome Them**

##### **Presented by: Sonia Maker, Ellucian**

Gen Z is the most cost-conscious and debt-averse generation ever. This makes the financial aid office one of the most critical functions of today's modern campus. However, the student's financial experience has been disrupted. And financial aid teams are buried in new administrative tasks. Staying on pace with Gen Z and all students requires tools that will increase enrollment, retention, and staff satisfaction, putting student financial success at the forefront of your institution. In this session, you'll learn about the top disruptors to student success. And you'll learn exactly what you need to do to change the score for your students and your financial aid team.

##### **Demystifying Veterans Education Benefits**

##### **Presented by: Andrea Davis, Harvard University & Stephen Pusateri, Simmons University**

Join us to learn more about the education benefits available to service members, veterans, and their spouses and dependents. We'll review federal and state benefits, Yellow Ribbon funding, and how these benefits interact with federal, state, and institutional aid.

## **Doing More with Less: How Restructuring and Organizational Change is the Key to Growth**

**Presented by: Tayler Kreutter, Mount Holyoke College**

Has your office been asked to take on a new initiative, work from another office on campus? What about all of our new federal regulations and systematic changes happening over the next couple of years? Are you being asked to do all of this "new" with the same team or less? Come to this session to learn about a unique approach to reorganizing and restructuring an office to do more. A proven strategy that requires only post-it notes, permanent markers and creative thinking; you can lead your teams to stronger and better work - with capacity to spare!

## **Financial Aid Jeopardy!**

**Presented by Julie Lawton, Cognition Financial**

This is Jeopardy! A fun interactive way to test your financial aid knowledge and learn something new! This information will directly assist you in the 2023-2024 academic year and beyond. Categories include FAFSA, Potpourri, Verification, Student Loans, and more. Join us in a game of Financial Aid Jeopardy where you will be split up into teams to see who takes home the win.

**4:15 PM – 4:30 PM VISIT WITH VENDORS!**

**4:30 PM – 5:30 PM CONCURRENT SESSION BLOCK FOUR**

## **A Novel Idea: A Problem With Fit**

**Presented by: Sarah Bergeron, Assumption University & Lauren Sullivan, Bentley University**

Join us as we discuss 'A Problem With Fit' by Phillip Levine and take a look at the complex system of college pricing- how it works, how it fails, and how fixing it can help both students and universities. How much does it cost to attend college in the United States today? The answer is more complex than many realize. Sticker price, industry jargon, and lack of clear published information can all be deterrents for a student applying to their top schools or applying at all. Affordability and price transparency are issues we face in our work every day; how might we reevaluate our approach to working with students? We encourage you to read the book ahead of time and come prepared with your thoughts. The format is typical book club style. We will have the questions ready; we just need your participation!

Book Club Discussion facilitated by the Financial Wellness and Professional Development & Training Committees

## **Student Engagement with Financial Aid: What They Need and How FAOs Can Help**

**Presented by: Patrick Ziegler, Earnest**

We all want to provide exceptional service to our students, but we don't always know how they feel about their engagement with us and what we could do to serve them better. This session will review the results of Earnest's second annual survey on student engagement which seeks to understand how undergraduate students are financing their education and the role that Financial Aid Offices play in helping them understand the process and financing options. We will pay particular attention to linguistic/communication challenges and incorporate relevant scholarly research on the subject.

## **Not Just Another Hand Calc Session**

**Presented by: Robert Weinerman, Iron Bridge Resources**

A look at how the Student Aid Index formula works, and how Pell eligibility will be determined in 2024-2025, with a specific focus on professional judgments and how changes to specific data elements will impact the student's aid eligibility.

## **Helping Tackle the Unknown of Your Annual Audit**

**Presented by: Greg Rinderle, McClintock & Associates, P.C.**

During this session will provide a detailed overview of recent changes to audit requirements and areas of focus from ED, outlining what you should expect for your school's next annual audit. We will present ideas to make an action plan, so the process of your annual audit is easier to manage. We will also share best practices for managing the updates from your colleagues.

**6:00 PM – 7:30 PM THERAPY DOGS FOLLOWED BY PRESIDENT'S RECEPTION AND AWARDS**

**7:30 PM SIMPLY FUN: MINUTE TO WIN IT GAMES**

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*Friday, November 17, 2023*

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**7:00 AM REGISTRATION OPENS**

**7:30 AM – 9:00 AM BREAKFAST**

**8:00 – 9:00 AM ROUND TABLES BY SECTOR – PLEASE CLICK SURVEY LINK TO PROVIDE QUESTIONS/FEEDBACK IN ADVANCE OF THE SESSIONS**

**COMMUNITY COLLEGE: FACILITATED BY JILLIAN GLAZE, BUNKER HILL COMMUNITY COLLEGE AND AMY STEWART, NORTH SHORE COMMUNITY COLLEGE**

[https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV\\_80uMLf8gBE6zRsy](https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV_80uMLf8gBE6zRsy)

**4 YEAR PUBLIC: FACILITATED BY LAURA JEPSON, UNIVERSITY OF MASSACHUSETTS AMHERST**

[https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV\\_d0a82V61vTwPIAm](https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV_d0a82V61vTwPIAm)

**GRADUATE/PROFESSIONAL: FACILITATED BY JONATHAN BRETT, BOSTON UNIVERSITY MEDICAL CAMPUS**

[https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV\\_0fe8dghqpD556zl](https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV_0fe8dghqpD556zl)

**PRIVATE 4 YEAR/FM & IM: FACILITATED BY SARAH BARKER, BENTLEY UNIVERSITY**

[https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV\\_8kcy7CxuvKBdEEe](https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV_8kcy7CxuvKBdEEe)

**PRIVATE 4 YEAR/FM ONLY: FACILITATED BY SARAH BERGERON, ASSUMPTION UNIVERSITY**

[https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV\\_7R1JOwVUe3awwcu](https://bunkerhillcc.co1.qualtrics.com/jfe/form/SV_7R1JOwVUe3awwcu)

#### **9:00 AM – 10:00 AM KEYNOTE OSFA UPDATE**

**Presented by: Clantha McCurdy**

#### **10:10 AM – 11:10 AM CONCURRENT SESSION BLOCK FIVE**

**Financial Aid Customer Service Workshop - Come ready to learn from each other as we role play some typical customer service challenges!**

**Presented by: Sarah Barker & Melissa Giunta, Bentley University**

This is a customer service focused workshop session, which includes role playing by participants (as aid officers or students/parents). We will present some typical customer service scenarios which happen every day at financial aid offices nationwide. Participants will break into small groups to act out the situations, observe other role plays and unpack how it all went. Come and learn a few new customer service tips and tricks!

#### **Averting Danger: Combatting Fraud in Higher Education, Financial Aid, and Student Credit**

**Presented by: Katrina Delgrosso & Brian Dassel, College Ave Student Loans; Jillian Glaze, Bunker Hill Community College**

We are witnessing a disturbing surge in fraudulent activities in higher education and financial aid, and financial aid administrators have a fiduciary responsibility to report suspected fraud. The objectives of this session are to raise awareness of the startling sophistication of fraud, discuss credit industry mitigants, and review campuswide best practices for deterrence. Just as Title IV administration is a campuswide initiative, so is the detection and reporting of fraud. The session will highlight an integrated strategy for fraud prevention that includes multiple campus offices as well as external partners, such as the Office of Inspector General (OIG), credit agencies, and lenders.

#### **Financial Wellness 101 Tools and Resources for your students**

**Presented by: Beth Feinberg Keenan, Bright Horizons College Coach**

It is never too late to support students in their financial wellness journeys. Unfortunately, many students enter college with little to no knowledge of financial wellness topics. As educators, we are in a unique position to help students create a strong financial foundation. Participants in this session will come away with tools and resources for high school and college students, learn about the importance of credit and how to understand the components of your credit score, best practices for protecting your identity, how to wisely use loans and credit cards.

#### **The Advantage**

**Presented by: Tayler Kreutter, Mount Holyoke College**

Have you ever witnessed a team that produces exceptional work and are happy doing it? Have you ever wondered what their secret sauce is? In his book *The Advantage*, Patrick Lencioni states that organizational health is the superior strategy. Come to this session to learn more about the case for

organizational health, the four disciplines needed to achieve it; and walk away with real tactics that will allow your office to maximize human potential and align your office to move forward in one direction together.

**11:10 AM – 11:30 AM VENDOR BREAK WITH SNACKS**

**11:30 AM – 12:30 PM CONCURRENT SESSION BLOCK SIX**

### **The Enjoyment of Student Employment**

**Presented by: Jaron Tucker, Harvard College & Clare Mansfield, Northeastern University**

Learn about the essential foundations of Student Employment. We will discuss federal work-study and how to use it to enhance relationships with community-based organizations. The legal regulations around student employment for both domestic and international students, as well as some programs used to aid Student Employment functions for both staff and students.

### **Managing Change in a Multigenerational Office**

**Presented by: Dr. Raymond Nault, Jr., College Aid Services, LLC**

In a post-pandemic era, we are seeing more and more of our colleagues retire or leave the profession. In times of uncertainty and upheaval, the ability to manage change effectively becomes crucial for individuals and organizations alike. This session aims to equip attendees with valuable insights, practical strategies, and a positive mindset to navigate through challenging transitions with resilience and adaptability. Through interactive discussions, real-life case studies, and experiential exercises, participants will gain the tools they need to thrive amidst change and uncertainty. This session is also intended for enrollment and financial aid leaders that are seeking a way to create a pathway for the next generation of leaders. This session will discuss the national and regional trends, review opportunities that allow others to act, and build a model for success.

### **One Stop Shop: Supporting One Stops and Providing a Positive Student Experience**

**Presented by: Matt Gingras & Alba Diaz, Bunker Hill Community College**

Creating a great student experience is a team effort! This session will give an overview of BHCC's Student Central One Stop department. Providing front line service for three offices, Student Central is many students' main stop when looking for help with their college roadmap. Learn how Student Central manages service and how the school's Financial Aid office provides support to the staff both on campus and remotely.

### **Nothing But 'Net': Take the time to discuss how your Net Price Calculator can benefit both you and your students**

**Presented by: Mike Goodwin, Williams College**

Six in ten families rule out some colleges because of sticker prices, yet many do not know that colleges have an available tool on their website to help them better understand what the cost might actually be. Net Price Calculators are federally mandated (boo!) but can actually help you build incredibly beneficial relationships with your families when used productively (yay!). This discussion-based session will focus



on the heralded "Garbage-in, garbage-out" theory for families and advisors to help you build healthy and informed future relationships with your students and families.

#### **12:30 PM – 2:00 PM LUNCH WITH FEDERAL UPDATE**

**PRESENTED BY: BETSY MAYOTTE, TISLA**

#### **2:00 PM – 2:15 PM VENDOR VISITS**

#### **2:15 PM – 3:15 PM CONCURRENT SESSION BLOCK SEVEN**

##### **Helping Families for Whom FAFSA Simplification Isn't So Simple**

**Presented by: Shawn Morrissey & Stephanie Wells, MEFA and Andrea Navarro Excel Academy Charter High School**

For the majority of families, FAFSA Simplification will make the financial aid application process simpler. However, there are some families who will need extra help navigating the new rules. Don't let students from vulnerable populations fall through the cracks. We will explore how changes in FAFSA Simplification affect eligible non-citizens, DACA students, families without Social Security numbers, and contributors with foreign tax returns. The process for divorced and separated contributors is new, and we will discuss how families should handle those changes. Hear from a school counselor who works directly with high school students from a wide range of backgrounds about the new FAFSA process and best ways to counsel families through it.

##### **What You Probably Didn't Know But Always Wanted to About Private Student Loans**

**Presented by: Andrea Weaver, KHEAA/KHESLC**

Confused about whether private student loans are a viable option for your students? This session will give an overview of private student loans as compared to federal loans, application and eligibility, information to help students decide whether to borrow and how to choose a lender and dispel some myths about lender lists.

##### **Partnerships, Policy, and Practice: Updated Guidelines from ED**

**Presented by: Tom Dalton, Edamerica**

Colleges and universities rely on third-party partners to provide a wide variety of services from bookstore operation to default prevention services and everything in between. A recently published Dear Colleague letter has expanded the official definition of a Third-Party Servicer (TPS). Based on the new guidance, it is imperative that institutions reevaluate current vendor services and determine which, if any, are TPS activities. Financial aid offices play a critical role in the TPS reporting process. This session will explore the expanded TPS definition and the associated implications for student data privacy, security requirements and other TPS provisions.

#### **3:15 PM – 3:30 PM RAFFLE AND CLOSING REMARKS**

#### **3:30 PM CONCLUSION: TIME TO SIMPLIFY**