



MASFAA

time to simplify

WALTHAM, MA | NOVEMBER 2023





MASFAA 2023 CONFERENCE PROGRAM



MASFAA

time to simplify

WEDNESDAY, NOVEMBER 15, 2023

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

Alcott Room

4:00 PM – 7:00 PM

Vendor Set-Up

Eden Vale Ballroom Foyer

4:00 PM – 6:00 PM

Registration Open

Eden Vale Ballroom Foyer

MASFAA 2023 CONFERENCE PROGRAM



THURSDAY, NOVEMBER 16, 2023

7:30 AM

Vendor Time with Coffee

Eden Vale Ballroom Foyer

8:00 AM – 9:00 AM

Breakfast

Eden Vale Ballroom

9:00 AM – 10:15 AM

Conference Welcome & Opening Session

MASFAA Welcome

Eden Vale Ballroom

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

FAFSA Simplification Panel

Eden Vale Ballroom

Presented by: Laura Biechler, Bridgewater State University, Jillian Glaze, Bunker Hill Community College, Gail Holt, Amherst College, Mika Lim, Northeastern University, Melissa Metcalf, Boston College, Jessica Sabourin, Worcester Polytechnic Institute;

Facilitated by: Robert Weinerman, Iron Bridge Resources
Time to Simplify! Join us for a panel conversation on FAFSA Simplification.

As we get closer to December, institutions across the state are making decisions on how best to implement the changes that have come with FAFSA Simplification. Come and share in the discussion on navigating the 2024-25 year, what decisions our panelists have made and how they are managing the remaining unknowns for the upcoming year.

10:30 AM – 11:30 AM

CONCURRENT SESSION BLOCK ONE

Artificial Intelligence (AI) and

Machine Learning (ML):

Financial Aid Office Friend or Foe?

Lincoln Room

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to enhance service and compliance and proactively identify common audit findings like Conflicting Information or outdated Consumer Information.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?

Emerson Room

Presented by: Valeria Harris, Harvard Graduate School of Education; Tracie Jones-Barrett, Ed.D., Massachusetts Institute of Technology

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 do 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.



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Reengaging Student Borrowers: Starting Over for the Best Possible Outcome

Concord Ballroom

Presented by: Tami Gilbeaux, Inceptia

Now that the resumed repayment date is here, 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. This is 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

Cambridge Room

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

Eden Vale Ballroom Foyer

12:00 PM – 1:00 PM

CONCURRENT SESSION BLOCK TWO

The Impact of Mental Health on College Completion

Concord Ballroom

Panelists: Amy C. Staffier, Simmons University and Andrew Shepardson, Bentley University

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

Lincoln Room

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, just combining admissions and aid can have significant benefits to the student experience and can help in 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.

Making Free Community College A Reality: Putting the Pieces Together

Cambridge Room

Presented by: Jillian Glaze, Bunker Hill Community College & Amy Stewart, North Shore Community College

Massachusetts is experiencing significant momentum in the movement toward free community college. Programs such as MassGrant Plus, MassReconnect, Tuition Equity, and the Community College Nursing Scholarship have created exciting new opportunities for Massachusetts Community College students. How do financial aid administrators make it all work for students? Join Amy Stewart from North Shore Community College and Jillian Glaze from Bunker Hill Community College for a brief presentation on the current status of free community college initiatives through the lens of the financial aid office. This will be followed by an opportunity for attendees to share thoughts, questions, and best practices, as well as discuss streamlining your operations for the future.

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Beyond the College Bill: The Hidden Hurdles of Indirect Expenses

Emerson Room

*Presented by: Femi Stoltz, uAspire &
Neeta Sonalkar, 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, Charity Introduction, and EASFAA Update

Eden Vale Ballroom

1:40 PM

The WILY Network Overview

Eden Vale Ballroom

Presented by: Judi Alperin-King

EASFAA Update

Eden Vale Ballroom

Presented by: Dr. Danette Burgess, EASFAA President

2:00 PM – 3:00 PM

Keynote OSFA Update

Eden Vale Ballroom

*Presented by: Clantha McCurdy, Senior Deputy
Commissioner Access and Student Financial Assistance,
Interim Chief Academic Officer*

3:15 PM – 4:15 PM

CONCURRENT SESSION BLOCK THREE

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

Emerson Room

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.



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Demystifying Veterans Education Benefits

Cambridge Room

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

Join us to learn more about the education benefits available to service members, veterans, 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

Concord Ballroom

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 the 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!

Lincoln Room

Presented by Julie Lawton, Monogram Personalized Student Loans

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!

Eden Vale Ballroom Foyer

4:30 PM – 5:30 PM

CONCURRENT SESSION BLOCK FOUR

*A Novel Idea: A Problem With Fit**

Lincoln Room

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

Join us as we discuss the book, 'A Problem With Fit', by Phillip Levine by taking 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. 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 Education and Professional Development & Training Committees.

**This session satisfies one of four credits needed towards earning your 2023-24 Certificate of Financial Wellness.*

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

Emerson Room

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.

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Not Just Another Hand Calc Session

Concord Ballroom

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. Specific focus will be placed on professional judgments and how changes to specific data elements will impact the student's aid eligibility.

Keeping Your Sanity During an Audit

Cambridge Room

Presented by: Tony Erwin, Community College of Rhode Island

Annual audits can be challenging for even the most seasoned financial aid professionals. It is possible; however, to have a successful audit and keep your sanity. Join us for this session to review typical audit requirements, discuss how to best prepare, and to talk about some of the most common audit findings. We will also review the recent changes to audit requirements and areas of focus from ED.

6:00 PM – 6:30 PM



Therapy Dogs Visit

Come visit with Blue from Bentley University and Sasha from Harvard University

6:00 PM – 7:30 PM

President's Reception and Awards

Eden Vale Ballroom

7:30 PM

Simply Fun: Minute to Win It Games

Eden Vale Ballroom





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FRIDAY, NOVEMBER 17, 2023

7:30 AM

Registration Opens
Eden Vale Ballroom

7:30 AM – 9:00 AM

Breakfast
Eden Vale Ballroom

8:00 – 9:00 AM

Roundtables By Sector
Concord Ballroom

Community College

Facilitated by: Jillian Glaze, Bunker Hill Community College and Amy Stewart, North Shore Community College

4 Year Public

Facilitated by: Laura Jepson, University of Massachusetts Amherst

Graduate/Professional

Facilitated by: Jonathan Brett, Boston University Medical Campus

Eden Vale Ballroom

Private 4 Year/Federal Methodology (FM) & Institutional Methodology (IM)

Facilitated by: Sarah Barker, Bentley University

Private 4 Year/FM

Facilitated by: Sarah Bergeron, Assumption University

9:00 AM – 10:00 AM

Overview of Changes for the 2024-2025 Financial Aid Cycle

Eden Vale Ballroom

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 – and now it's actually happening. Let's take a broad overview of the two acts and how they are changing the way we 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. 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.

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!

Emerson Room

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

Concord Ballroom

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

We are witnessing a disturbing surge in fraudulent activity 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 campus wide best practices for deterrence. Just as Title IV administration is a campus wide 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**

Lincoln Room

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, and how to wisely use loans and credit cards.

**This session satisfies one of four credits needed towards earning your 2023-24 Certificate of Financial Wellness.*

The Advantage

Cambridge Room

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

Eden Vale Ballroom Foyer

11:30 AM – 12:30 PM

CONCURRENT SESSION BLOCK SIX

The Enjoyment of Student Employment

Cambridge Room

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.





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Managing Change in a Multi-Generational Office

Emerson Room

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

Lincoln Room

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 road map. 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

Concord Ballroom

Presented by: Mike Goodwin, Williams College

Six in 10 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

Eden Vale Ballroom

Presented by: Betsy Mayotte, TISLA

2:00 PM – 2:15 PM

Visit with Vendors!

2:15 PM – 3:15 PM

CONCURRENT SESSION BLOCK SEVEN

Helping Families for Whom FAFSA Simplification Isn't So Simple

Concord Ballroom

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.

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

Emerson Room

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

Cambridge Room

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

Charity Raffle and Closing Remarks

Eden Vale Ballroom

3:30 PM

Conclusion: Time to Simplify

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