

Admission and Financial Aid - One Perspective on What to Expect in the Next Several Years

In this session the presenter will talk about emerging trends and how by changing demographics, costs and technology, we shape how students and colleges connect.

Mike Bartini, Senior Vice President for Enrollment, The College Board

Assessing & Addressing Information Security (for the Technology Impaired)

In this session we will explore the ways that you can better protect information both at home and in the office. Geared primarily to the non-techie (or techie wannabe) we'll explore some of steps and tools you can use to implement an effective and successful information security plan. This session is a must attend for anyone who hasn't gone through an information security training session on their own campus and a great refresher for those who have!

Shawn Monk, Professional Services Consultant, American Student Assistance

Can We Really Help at Risk Students?

There are many programs that target underprepared or under represented students but do they work? Can they work better? This is a prospective from a financial aid officer at a small to mid sized, moderately selective public college.

Curt Martin, President of RMASFAA (Director of Financial Aid), Mesa State College

Communication Tactics

The financial aid office and the students we deal with are becoming increasingly multigenerational. The session will deal with importance of understanding communication styles across generations.

Curt Martin, President of RMASFAA (Director of Financial Aid), Mesa State College

Cost of Attendance Development and Communication

This session will give participants the tools to derive allowable Cost of Attendance components (including a discussion of Cost of Attendance restrictions) and to develop realistic budgets appropriate for most students. It will include an overview of the procedures for adding additional allowances and for using Professional Judgment in instances of unique circumstances. It will then focus on publicizing the Cost of Attendance, and most importantly on how to clearly explain the Cost of Attendance to students and their families. (from NASFAA Fall 2007 Training)

Jacqueline Davies, Assistant Director of Student Financial Services, Middlebury College

Demystifying Federal Methodology

This session will give participants tools to demystify Federal Methodology for students and families. While this session reviews FM, it is not FM training. To ensure that everyone has the same basic understanding of FM, the session will start with an overview of the Expected Family Contribution (EFC) formulas and their components and then discuss the impact of adjusting a single data element. It will then focus on counseling strategies and tools for counseling students and families. (from NASFAA Fall 2007 Training)

Clint Hanson, Director of Financial Aid, Thomas More College of Liberal Arts

Developing Best Practices: A Comparison of Legislated Practices Between Lenders and FA Professional

Now that we have regulatory and statutory guidance concerning inducements and preferred lender lists, our challenge is to develop and implement best practices that allow us to be in compliance and best serve the needs of our students. The goal of this session is to help you meet that challenge.

Ed Schroeder, Training Consultant, Great Lakes Higher Education Corp.

Developing a Lender List: The Vermont Way

Wondering just how to implement all of those new federal regulations concerning a 'Preferred Lender List'? Come hear how the aid community in Vermont worked together to develop a survey and evaluation tool to help meet these requirements. You will hear about the steps we took, receive a copy of the survey questions, and see a demonstration of the evaluation tool used to quantify the answers from the survey.

Cathy Mullins, Director of Financial Aid, Landmark College

Developing a Preferred Lender List

This session will help participants to understand negotiated rulemaking and the requirements of developing a preferred lender list. Best practices will be discussed as well as a proven successful process.

Sarah Bauder, Director of Student Financial Aid, University of Maryland

Financial Aid Jeopardy - En Espanol

For our Spanish speaking EASF AA members, mostly our PRASF AA members: Esto es Jeopardy! Igual al programa de television, eligen una categoria para revelar la 'respuesta secreta'. Si responden con la 'pregunta correcta' se ganan esa cantidad de dinero. Si no, pierden la misma cantidad. Diviertanse y aprendan a la vez con sus colegas de Asistencia Economica.

Angelica Esparza, NY/PR Regional Sales Manager, Academic Finance Corporation

Julie Lawton, Sales Manager, Academic Finance Corporation

Financial Aid Leveraging for Graduate/Professional Schools

For years, colleges and universities have been using institutional financial aid funds strategically in support of undergraduate enrollment goals. At the graduate level, however, most institutions either fully fund students (typically in PhD programs); offer across the board discounts in price (e.g. for off-site programs); or offer no institutional aid. This session will share analytical techniques that can help graduate programs understand the price sensitivity of their market in more detail and then develop financial aid leveraging strategies to build demand, improve yield rates, and understand tradeoffs between class characteristics (academic quality, net tuition revenue, diversity, etc.).

Samantha Veeder, Sr. Consultant, Scannell & Kurz, Inc.

Odette Franceskino, Director of Financial Aid, Quinnipiac University School of Law

Financial Aid Presentations to High Schools and Other Audiences

Very experienced aid officer discusses different approaches to making presentations about financial aid and paying for college. The session will help you in knowing what to do whether it's a five minute or five hour program!

Robert Shorb, Assoc. Dean & Dir. Of Student Aid and Family Finance, Skidmore College

FSA Assessment Tool and Forecaster (Repeated)

Claire M. Roemer, General Manager, School Services and Training, Federal Student Aid

The Gay Family Goes to College

Heather McDonnell, Director of Financial Aid, Sarah Lawrence College

Graduate Financial Aid Trends and Regulatory Update

Topics that will be addressed include, (1) what constitutes an academic year for graduate students, (2) defining enrollment level such as full-time, three-quarter time, and part-time, (3) processing financial aid for seamless programs - bachelor's to master's, (4) satisfactory academic progress, and (5) an update on federal regulations related to graduate student financial aid.

Philip Malinoski, President, Higher Education Strategies

Henry Miller, Vice President of Operations, Higher Education Strategies

Graduate PLUS Loans and Adverse Credit – How Can We Help Grad/Professional Students?

Credit counts when it comes to the Federal PLUS Loan program. As such, some students are having trouble meeting the credit requirements for the loan. This raises a number of questions that will be addressed in this interactive session. For example, what do graduate/professional students need to know to qualify for a PLUS Loan? What problems are they having getting approved for the loan? How can they repair their adverse credit problems? Why are private student loans that are based on credit scoring sometimes an option when the student cannot qualify for a PLUS? Answers to these questions also can help you if you work with the parents of dependent undergraduate students who need loan assistance.

Gina Soliz, Director of Financial Aid, Syracuse University College of Law

Jeffrey Hanson, Director of Borrower Education Services, Access Group

Identifying Financially-Distressed Students

Do you know how to “spot” a financially-distressed student? Learn the signs to watch for and financial literacy strategies and programs to support you as you identify and assist financially-distressed students.

Brenda Vaughn, Financial Literacy Director, National Student Loan Program

Mel Stephens, Financial Literacy Consultant, National Student Loan Program

Illegal or Unethical? Understanding your Decision Options and Implication

It is often difficult to understand what is illegal versus what is considered unethical in financial aid administration. Although recent events have focused on educational loan issues, many other aspects of financial aid such as packaging policies, eligibility of students, professional judgment decisions, release of student info and other topics often give pause to consider what can or should be done. Join in a review of some of the most pressing issues facing aid administrators in our current environment.

Christine Zuzack, VP for State Grant and Special Programs, PHEAA

Income-based Repayment and Loan Forgiveness Under the College Cost Reduction and Access Act

Professor Schrag will discuss the operation of Sections 203 and 401 of the College Cost Reduction and Access Act, which will create the income-based repayment option and will provide loan forgiveness for borrowers who have spent ten years in public service after October 1, 2007. His talk will include a description of these new provisions; calculations showing how they will apply to high-debt borrowers (both those who qualify for forgiveness and those who do not); explanations of effective dates; a discussion of how married borrowers will be affected; analysis of how the Internal Revenue Code will affect forgiveness; and consideration of the pending Department of Education regulations and the relevant parts of the Department's 2009 budget proposals.

Philip G. Schrag, Professor of Law, Georgetown University

It's a Pod World After All

Have you noticed that email you sent to a student has gone unread? How many times have you said "it is written clearly on our website?" Your students now view flat websites and email the same way they view VHS cassettes and snail mail; as outdated forms of technology. Pod Casts, Video Blogs and Mobil technologies are they ways in which your students not only communicate to one another but wish to receive communication and important information from you. In this session Christopher Penn, CTO at the Financial Aid Podcast will discuss these shifts in the way students receive and respond to information and how your institution can implement technologies to reach your students with important and timely information with minimal impact on your budgets and programmers.

Christopher Penn, Chief Technology Officer, Edvisors/Student Loan Network

Mentoring People into Our Business Through the Spirit of Volunteerism

It is axiomatic that no one is dying to get into our business! This Session, therefore, focuses on several strategies to attract people into the financial aid profession. Discussion will focus on the 2007 NASFAA Award Winning CAPFAA Mentee-For-A-Day (MFAD) Program; Certification of the FA Professional and Enhancing the Financial Aid Profession through television, etc. Discussion will underscore how we, as Financial Aid Professionals, can use the Spirit of Volunteerism to help to grow and transition the Financial Aid Profession. Session will place exquisite emphasis on audience participation, so come prepared to be profoundly engaged!

Neville Brown, Assistant Director of Financial Aid, Eastern Connecticut State University

Millennials Synergy in the Workplace

Diversity in the workplace takes different forms, including generational diversity. Experts on generational diversity believe that understanding the different generations, including their beliefs, behaviors, and expectations, is critical to maintaining a satisfied and high-performing workforce. The Millennial Generation includes those born between 1980 and 1995, and they are the fastest growing segment of the workforce. This presentation will explore how institutions can engage the Millennial Generation and create synergetic relationships to capitalize on the generational differences that exist. Participants will examine recent research on this population to develop an understanding of who millennials are and discuss how they differ from the other generations in the workplace.
Melissa Rakes, Senior Financial Aid Specialist, Delaware Tech. & Comm. Coll., Owens Campus

Moving Beyond Financial Aid: Taking it to the Next Level

We will be presenting on the following topics: automated processing, electronic loan management systems, programs, presentations, training, publications, customer services and how each of those topics has impacted our students, staff, faculty, and community as well as future plans for the office and institution.

Rachel Gordon, Director, Student Financial Planning, Alvernia College

Christine Saadi, Associate Director, Student Financial Planning, Alvernia College

Negotiating the Regulatory Process

Financial Aid Offices have to comply with Title IV Federal Student Aid Regulations. But where do those regulations come from, who develops them, and what can you do to make them a bit more reasonable? This session will take you through the Regulatory Process, including Negotiated Rulemaking, Notices of Proposed Rulemaking, and final regulations, using examples from the Spring 2008 negotiated rulemaking committees. The presenter, Irv Bodofsky, is a former Negotiated Rulemaking committee member, and a past NASFAA National Chair and EASFAA President.

Irvin Bodofsky, Assoc. Dean and & Dir. of Financial Aid, SUNY - Upstate Medical Center

New Hampshire's Campaign for Financial Literacy

A unique partnership has been formed between the NHHEAF Network Organizations and Consumer Credit Counseling Services of NH/VT - all with the goal of educating students about the fundamentals of financial literacy. With workshops like "The Freshman Forty" (40 Money Management Tips Every College Freshman Should Know) 'The Very Real Life' (Budgeting for Success) and 'Broke Not Broken' (Life After College), students learn the basics and set a foundation for good financial health - during and after college!

Tori Berube, VP, Product Marketing & Business Services, The NHHEAF Network

Rebecca Palmer, Director of Education, Consumer Credit Counseling Services of NH/VT

Non-Traditional Families in the World of Financial Aid

Family Structure today is more fluid and non-traditional than a generation ago. High School counselors and college financial aid staff are faced with defining today's complicated family structures. Who should contribute? Who is contributing? To whom do we communicate? We invite you to come to this session ready to share your thorniest story, how you handled the situation or wish that you had. The session will be interactive and focus on the issues we face and the approaches used.

Elizabeth Keuffel, Director of Financial Aid, St. Anselm College
Zanna Blaney

NSLDS - It's More Than Just Loans!

Learn how to use NSLDS as a tool for monitoring Pell Grants, ACG/SMART Grants, overpayments and student enrollment. An overview on how to interpret the loan data will also be included.

Barbara Schmitt, Director of Financial Aid, Mansfield University
Rachael Lohman, Eastern Regional Manager, Pennsylvania School Services Group/ AES

Perkins Loan Session

What is the potential impact of mandatory loan assignments and capped collection cost recoveries on our campus' Perkins Loan funds? How will these changes affect our third party collection partners' willingness to work with schools? Find out what a university bursar and collection agency representative see in their crystal balls about the future of the Perkins Loan program, and why you should care.

James D. Jones, Vice President of Sales & Marketing, Immediate Credit Recovery, Inc.

Policies and Procedures

This lively session will review an online policy and procedure manual as used at Northeastern University. Track a policy from an idea, through committee and manager review to publication and implementation.

Brian Murphy Clinton, Associate Director of Financial Aid Services, Northeastern University
Tony Erwin, Director of Financial Aid Services, Northeastern University

Professional Judgment: Beyond the Numbers

What happens when the numbers don't tell the whole story? No methodology can adequately account for all the situations that influence a family's financial status. Professional judgment remains an essential and personalized tool in the effort to adequately assess family ability to pay. Effective use of this discretion humanizes the application bureaucracy and serves to distinguish the accomplished aid administrator from the technician. Given the close relationship between affordability and enrollment, access to higher and the equitable distribution of aid resources are closely related to the sensitive assessment of financial need. This session examines the regulatory, policy and implementation issues along with the professional challenges that confront even the experienced aid administrator.

Linda Dagradi, Senior Educational Manager, The College Board

Puerto Rico Tax Forms and the FAFSA

We will examine the PR tax forms, both the long and the short forms and will go through them in Spanish and English.

Luis Aquiles, Vice President, Regional Accounts, Student Loan Express

Samuel Rivera, Institutional Financial Aid Director, Escuela Tecnica de Electricidad

SAP - Requirement and Tool for Success!

How do you use policies and procedures on Satisfactory Academic Progress to identify and assist at-risk students? How do you get cooperation from other departments? Hear how one school worked through (and continues to work through!) the challenges of meeting federal requirements for aid that do not necessarily 'match' the requirements and definitions on the 'academic side'. The federal requirement is used as a tool to assist in counseling students.

Allene Curto, Associate Director of Financial Aid, Springfield College

“Show Me the Money” -- Strategies for Helping Undergraduates Prepare

Undergraduates increasingly are entering graduate or professional degree programs once they graduate. Do they know how to finance their post-graduate education plans? Do they understand the differences between financing an undergraduate degree and grad/professional school? This interactive session will provide you with an opportunity to explore strategies to help undergraduate students (and their families) prepare for the financial realities of post-graduate education.

Jeff Hanson, Director of Borrower Education Services, Access Group

So You Think You Are Ready to be a Financial Aid Director!

This panel presentation consisting of several financial aid directors will cover the leadership qualities needed to be an effective director in the financial aid office. This session is being sponsored by the EASFAA Leadership Development Committee.

John View, Director of Financial Aid, SUNY – ESF

Solutions for Serving Hispanic Students and Families

Did you know that in the next decade Hispanics will account for approximately two-thirds of the college-age population? Research shows, however, that a lack of financial aid awareness may prevent these Hispanic students from achieving a higher education. Moreover, the lack of financial aid awareness among their parents is not allowing them to become strong advocates for their children's education. Participants in this session will learn how institutions can reach out to Hispanic students and parents and provide them with tools and resources that will help them in accessing higher education. Information on national and local outreach programs serving the Hispanic community will be discussed.

Maria Frias, Sr. VP, Hispanic Initiatives, Sallie Mae

Ivette Rivera-Dreyer, Director of Financial Aid & Veterans Affairs, Manchester Community College

TEACH Grant 101

*Jeff Baker, Director of Policy Liaison and Implementation Staff, Federal Student Aid
Claire M. Roemer, General Manager, School Services and Training, Federal Student Aid*

Technology Session

Mark Greenfield, Director, Office of Web Services, University of Buffalo

Using CAS Assessment Tools in the Financial Aid Office

There is an unprecedented demand for accountability from higher education, and assessment is a major component of accountability. You know you have compliant policies and procedures in place, but what are you doing to assure that those policies and procedures have the desired outcomes? Are your office's mission and goals congruent with those of the college? CAS, the Council for the Advancement of Standards in Higher Education, is a consortium of professional associations (including NASFAA) that has developed functional standards, guidelines, self-assessment guides and other tools that help offices measure their effectiveness and their impact on student learning, and to identify areas to focus on moving forward. Learn how you can use these tools to assess your office, document your progress and demonstrate your accountability to administration, faculty, accrediting agencies and others.

David Sheridan, Dean of Enrollment Management, Union County College

Veteran's Benefits 101

This session will provide an overview of the Veterans Dependents Educational Benefits program administered by the Bureau of Maine Veterans Services. Specifically, the session will explain recent changes in the program laws and talk about the importance of the University and Bureau personnel working together to ensure benefits are administered in accordance with the law. You will have the opportunity to ask questions.

Peter Ogden, Director, Bureau of Maine Veterans Services

Nancy Plourde, Office Specialist II Supervisor, Bureau of Maine Veterans Services

Welcome First-Timers

This session will be held for individuals who are new members of the EASFAA conference/association as well as individuals who are new to the financial aid industry. It will give the new members a sense of what we do and who we are. The session will be informational as well as an excellent source for networking. New members can have time to ask questions about the conference/association as well as the industry itself.

Panel of Seasoned EASFAA Professionals

When Helping You Is Hurting Me: Wellness in Financial Aid

We are passionate about the students and families we serve and sometimes, many times, that passion is labor-intensive, even heart-wrenching. Partnered with the administrative demands of the job, family, school and something called a "life" we can be pretty stressed out and for some the life styles or life choices are not healthy. This workshop will guide us back to balance and remind us of ways to get and stay healthy- body, mind and spirit.

Louisa Martin, Director of Financial Aid, Southern New Hampshire University

When the Department Writes/Calls

What should you do when you receive a letter or a call from the Department of Education? The goal is not to panic. This session will tell you what to do.

Kim Downs, Director of Student Financial Services, Middlebury College

Kristi Jovell, Director of Financial Aid, Suffolk University Law School

Wiki-size Your Financial Aid Policies & Procedures: Next Generation Knowledge Management

The central concept of this session focuses on how a financial aid office can retain knowledge. To start, we'll explore some central concepts in knowledge management, including the role and value that it brings to any industry. Then we'll spend a few minutes exploring the value this practice brings to the financial aid office specifically. To make this happen, we'll look to a technology-based solution called a Wiki that offers some unique features and functionality that could streamline the process of updating and maintaining this information. Included within this presentation will be a live demo of a sample procedures manual using a Wiki solution. Technophobes and technophile alike will greatly benefit from this. No prerequisite technical knowledge is required.

Gina Lucente Cole, Manager of Professional Services, American Student Assistance