Conference Breakout Sessions Descriptions

**Wednesday, May 20, 8:00-9:15**

**Session:** Keep This, Not That – Partnering for Student Success  
**Location:** Vanderbilt  
**Presenter(s):** Kizzy Morris, Director of Enrollment Services, East Stroudsburg University of Pennsylvania  
**Facilitator:** Nicole Verrett, Director of Client Relations and Marketing, Financial Aid Services  
**Session Description:** Now more than ever, colleges and universities are looking for ways to streamline processes that impede student success and place administrative burdens on staff. This session chronicles the process of pinpointing what keeps counselors and other staff from reaching students who truly need help. By offloading the most time-consuming components of the financial aid process, staff invest more time in students and focus on the most important enrollment strategies.

**Session:** Federal Session: Verification & Unusual Enrollment History  
**Location:** Ballroom C  
**Presenter(s):** Zack Goodwin, Training Officer FSA, US Department of Education  
**Facilitator:** Julie Lawton, Relationship Manager, First Marblehead  
**Session Description:** This session will cover verification requirements for 2015-16. We will also discuss Unusual Enrollment History (UEH), common issues, and key trends in verification selection.

**Session:** Learn How to be a Negotiator  
**Location:** Ballroom D  
**Presenter(s):** Dawn Mosisa-Lowe, Director of University Financial Aid Compliance, Johns Hopkins University  
**Facilitator:** Brian Lemma, Associate Director, Georgetown University  
**Session Description:** Do you wonder why your colleagues get chosen to participate in the Negotiated Rulemaking process or how you can be in their shoes? The Negotiated Rulemaking process needs engaged aid professionals to be successful. EASFAA has a wealth of experienced negotiators, but they all started just like you...as aid professionals. Join the EASFAA Federal Relations Committee to learn the how to get involved, how to prepare, what to expect. This is a wonderful opportunity to position yourself and your institution as critical to the success of the student aid programs!

**Session:** Start Local – Advocating for Financial Aid at the State Level  
**Location:** Heritage  
**Presenter(s):** Bernie Pekala, Director of Student Financial Strategies, Boston College  
**Facilitator:** Stephanie Wells, Director of Community Outreach, MEFA  
**Session Description:** While state resources for financial aid continue to erode across the nation, it's now more important than ever to advocate for need based financial aid at the state level. Join members of MASFAA’s Government Relations Committee to discuss ways your institution and state organization can garner support for financial aid locally. This session will share information about events, tools, resources, and training opportunities that have been employed in Massachusetts to help garner support from state officials and legislators. Training and education provided by your association or institution can be a great resource for local legislators to arm them with the information they need to help constituents and fight for increased dollars for financial aid during budget season. Have you done similar work in your state? If so, please come and share your ideas as well!
**Wednesday, May 20, 11:15 – 12:30**

Session: How to Prepare for an Audit  
Location: Vanderbilt  
Presenter(s): Dawn Mosisa-Lowe, Director of University Financial Aid Compliance, Johns Hopkins University  
Facilitator: Brian Lemma, Associate Director, Georgetown University  
Session Description: Are you prepared for an audit or program review? Do you know what the reviewer will look at? What is the difference between different types of audits and programs reviews, and how does that impact your approach? We’ll review the types of audits and perspectives of those audits and reviews, the differing triggers for those reviews, who performs them and what they are looking for. We’ll discuss how to prioritize your high risk areas and ensure you’re prepared. We’ll also review what to expect during the review process and how best to work with your reviewer and your management.

Session: The CDR Appeal Process from a School Perspective  
Location: Ballroom C  
Presenter(s): Deborah Gronback, Manager of UFALO Operations, Harvard University and James Slattery, Sr. Director of Financial Aid, Northeastern University  
Facilitator: Jeff Feroce, Financial Aid Counselor, Salve Regina University  
Session Description: Have you ever researched the details behind your Cohort Default Rate? Have you ever uncovered inaccuracies in NSLDS records for your students in delinquency or default? Most financial aid offices have neither the time nor staff to regularly review the underlying data for their students in default. But with default rates increasing and CDR playing a higher stakes role in the funding and evaluation of financial aid offices, an annual review of CDR is in order – minimally during the challenge period after publication of the 3-year draft rate. This session will explore the trials and tribulations of two financial aid offices that have challenged student record data and successfully realized reductions from the draft to final CDR. While the presenters do not profess to be CDR experts, they will provide some entertaining and informing insight for those considering a CDR challenge. There will be opportunity for discussion and for audience members to share similar experiences and lessons learned.

Session: Awarding Need-Based Institutional Dollars Effectively Using the CSS Profile  
Location: Ballroom D  
Presenter(s): Katrina Delgrosso, Director of Financial Aid Solutions, College Board  
Patricia Reilly, Director of Financial Aid, Tufts University  
Sandra Oliveira, Executive Director of Financial Aid, Providence College  
Ashley Bianchi, Director of Financial Aid, Lafayette College  
Facilitator: Ruth Graham-Hayes, Financial Aid Counselor, Delaware College of Art and Design  
Session Description: As stewards of limited institutional funds, how do we best assess financial need and award financial aid in the most effective way? Panelists from institutions in the EASFAA region will address how they align their institutional need analysis and financial aid policies with mission as well as funding constraints, keeping in mind the implications for admission, retention, and graduation rates. They will also discuss how they monitor and refine the effectiveness of their aid policies and programs. Participants will be invited to share best practices for balancing the demands of increasing financial need with budget constraints and for managing family expectations around relative sacrifice.

Session: Transform Your Core  
Location: Heritage  
Presenter(s): Rich Neilsen, School Services Specialist, NH Higher Education Loan Corporation  
Tara Payne, VP College Planning and Community Engagement, NH Higher Education Loan Corporation  
Facilitator: Shannon Gallagher, Associate Director, Rhode Island School of Design  
Session Description: During this session, we will focus on your core; no gym membership required! Whether you are formally in a leadership position within your office or aspire to be, this interactive session is for you. We will discuss the key issues that hinder team performance and offer practical suggestions that you can implement, which will result in positive change.

**Wednesday, May 20, 2:00 – 3:15**

Session: Public Service Loan Forgiveness  
Location: Vanderbilt  
Presenter(s): Diona Brown, FedLoan Servicing Public Sector Representative, PHEAA
Facilitator: Donna Evans, Head of Campus and Customer Relations, College Ave Students Loans
Session Description: The Public Service Loan Forgiveness Program was enacted in 2007 to encourage individuals to enter and continue to work full-time in public service jobs. FedLoan Servicing is the sole servicer for Public Service Loan Forgiveness and during this session we will discuss the following: program overview, eligibility requirements borrower and school experience, and tools schools can use to spread awareness to their alumni and students. We will also discuss how qualifying payments are tracked common application denial reasons.

Session: The Role of Communications in the Media
Location: Ballroom C
Presenter(s): Marisa Quinn, Director of Communication & Outreach, Brown University
Richard Jacob, Associate Vice President for Federal and State Relations, Yale University
Facilitator: Wynette Zuppardi, Director of Financial Services, Brown University
Session Description: This session will include a discussion on the role of communications in the media in today’s higher education and political environment and the relationship between university communications staff, the Office of Financial Aid, Admissions, Institutional Research, etc. Discussion topics include: How do institutions represent the cost of higher education regarding sticker price and the federal approach to highlighting schools with high tuition increases; the impact of sticker price and federal reporting regarding costs and the setting of policy; what role do financial aid personnel play?; how does the institution coordinate media requests to ensure a standard and appropriate message?

Session: Examining the Financial Challenges of Today’s Young Adults
Location: Ballroom D
Presenter(s): Joanne Dashiel, Manager of Partner Engagement, American Student Assistance
Facilitator: Kristin Hawley-Johnson, Director of Sales, Sallie Mae
Session Description: As professionals and student/alumni advocates, we often try to put ourselves in their shoes. And, while we have honed our listening and counseling techniques, with a new generation comes new challenges and approaches to life. Using 2013 data, this session provides real-life examples with qualitative stories backed by quantitative research on both the financial and psychological challenges that today’s young adults face. Attendees will walk away with a better understanding of how to successfully engage this group to help them set a foundation for future financial success.

Location: Heritage
Presenter(s): Heather Mores, Director of Compliance for Enrollment Services, Northern Essex Community College
Erika Callahan, Senior Financial Aid Counselor, Northern Essex Community College
Facilitator: Jennifer Astle, Chief Marketing Officer, College Ave Student Loans
Session Description: This session is designed to assist you in building a comprehensive financial aid policy & procedure manual. We will cover what is required. What should be included? Where to start? How often it should be updated? What it might look like? And suggestions on best practices.

Wednesday, May 20, 3:15 – 4:30

Session: NCAA – An Update on Division I Financial Aid Legislation
Location: Vanderbilt
Presenter(s): Alex Smith, Associate Director of Academic and Membership Affairs, National Collegiate Athletic Association
Greg Davis, Associate Director, Champlain College
Facilitator: Session Description: This session, intended for NCAA Division I schools, will provide an update on issues affecting NCAA Division I financial aid legislation to help prepare you to discuss these issues on your campus and within your conference. Information will be provided about the new NCAA Division I Governance Structure, including information about areas of autonomy and where financial aid-related issues will be discussed in the new structure and the NCAA Division I financial aid legislation adopted by the five autonomy conferences in January, including information for institutions in other NCAA Division I conferences who are considering whether to apply that legislation. The session will also include time for attendees to discuss questions about the information presented.

Session: Federal Session: FSA Information Systems – The Big Picture
Location: Ballroom C
Presenter(s): Zack Goodwin, Training Officer FSA, US Department of Education
Facilitator: Jim Anderson, Director of Financial Aid, Montclair State University
Session Description: Federal Student Aid hosts a number of information systems, software products, and websites to deliver student aid and manage the delivery process. This session presents a high-level interconnected view of the FSA information technology applications used by schools, students, parents, and servicers throughout the student aid life cycle. Topics include a functional overview of each major FSA system, linkages between FSA systems, self-service features of major systems, and user access requirements. Sources of system documentation and call center support for each major system will also be discussed.

Session: Diversity in the Workplace: Benefits, Challenges, and Solutions
Location: Ballroom D
Presenter(s): Keyimani Alford, Trainer, Great Lakes Higher Education Loan Services, Inc.
Facilitator: Lisa Talbot, Director of Business Development, Sallie Mae
Session Description: Diversity is those human qualities that are different from own and outside the group to which we belong. It’s important to understand how these dimensions affect performance, motivation, success, and interactions with others. However, a diverse workplace brings about challenges as well as tremendous benefits. Join this interactive and enlightening session as we address issues and solutions that can make our offices even more dynamic workplaces.

Session: Challenging Negative Attitudes
Location: Heritage
Presenter(s): Mindy Hager, Vice President National Sales, First Marblehead Corp
Facilitator: Catherine Boscher-Murphy, Assistant Director/Compliance Officer, Montclair State University
Session Description: This presentation explores how to challenge individual negativity as well as how to protect yourself from the negativity of others in the office. We'll look at behavioral models to use in coaching yourself and others in how to build optimistic responses to any given situation. We will learn how negative norms become entrenched in an organization, department or team and how to create a more positive working environment.

Thursday, May 21, 8:00 – 9:15

Session: Promoting Healthy Credit Awareness
Location: Vanderbilt
Presenter(s): Ed Gonzalez, Director Business Development, Sallie Mae
Facilitator: Diane Sadlier, Assistant Director of Financial Aid, New England Institute of Technology
Session Description: Looking for a way to ensure your students get started towards a bright financial future? This session will provide you with information on how to help your students manage their spending, save money, build and maintain good credit, and understand the basics behind student loan repayment. Perfect for the student who is on their own for the first time, they will walk away knowing the key principles of money management, borrowing guidelines, credit card usage, identity theft, as well as tips on managing student loans.

Session: Federal Session: Direct Loan Processing: Making COD Work for You
Location: Ballroom C
Presenter(s): Zack Goodwin, Training Officer FSA, US Department of Education
Facilitator: Odette Franceskino, Director of Financial Aid, Quinnipiac University School of Law
Session Description: Federal Student Aid hosts a number of information systems, software products, and websites to deliver student aid and manage the delivery process. This session presents a high-level interconnected view of the FSA information technology applications used by schools, students, parents, and servicers throughout the student aid life cycle. Topics include a functional overview of each major FSA system, linkages between FSA systems, self-service features of major systems, and user access requirements. Sources of system documentation and call center support for each major system will also be discussed.

Session: Communicating Effectively with Disabled Students
Location: Ballroom D
Presenter(s): Sarah Mariner, Associate Director of Financial Aid, Johns Hopkins University Carey Business School
Aristea Williams, Director of Financial Aid, Johns Hopkins School of Education
Facilitator: Susan Kolls, Associate Director of Student Account Services, Northeastern University
Session Description: Let's discuss the challenges involved in communicating and working with disabled students, and how we can more effectively promote cultural mediation and cooperation during our interactions.
Session: Default Management - From TIVA to Delinquency - Lessons learned and what you need to Know
Location: Heritage
Presenter(s): Gary Spoales, VP Student Financial Aid, American Public University System
Ron Parker, President, Student Data Warehouse
Facilitator: William Bianchi, Manager, Rhode Island Student Loan Authority
Session Description: Default Management is one of the most pressing issues in higher education today. While some schools are positioned well for the foreseeable future, many schools have critical decisions to make about how best to present information to students and how to achieve results for the institution. This session will attempt to provide attendees an action plan, checklist, and Q&A’s when seeking help from an outside party. First, you have to know what you can do internally combined with what happens at the TIVA level. Second, you need to understand how to navigate the marketplace of options in the default management service provider space. We will prepare you to ask the right questions; how to evaluate your portfolio; and to take the appropriate steps before making a decision. Finally, you will learn ways to evaluate servicer performance and the important factors to analyze for making ongoing good decisions.

Thursday, May 21, 11:00 – 12:00

Session: Today’s Family
Location: Vanderbilt
Presenter(s): Heather McDonnell, Director of Financial Aid, Sarah Lawrence
Facilitator: Sean Ferns, Associate Director, Brown University
Session Description: Today’s Family will discuss how varying family structures have changed over time. Using US Census data from 1970 to 2011, this session will assist with understanding the demographic shifts in the households, married verses single parent and those with children under the age of 18. Additionally, this session will highlight the difficulties that some family structures may encounter when applying for aid and what the aid office may need to consider to ensure families are treated consistently. Specific cases will be discussed to demonstrate the impact on the parent contribution based on different family structures and who is included in the family unit for financial aid purposes.

Session: NASFAA Ethical Principles and Code of Conduct
Location: Ballroom C
Presenter(s): Eileen O’Leary, Assistant Vice President Student Financial Assistance, Stonehill College and NASFAA National Chair
Facilitator: Gary Spoales, VP Student Financial Aid, American Public University System
Session Description: In March, 2014, our NASFAA Board of Director approved an update to our Statement of Ethical Principles and Code of Conduct for Financial Aid Professionals, as proposed by a membership committee of financial aid administrators. In this session, learn about the difference between our broad-based, aspirational ethical principles and the focused, basic code of conduct with its particular enforcement procedures. Find out why the NASFAA Board of Directors has updated, clarified, and codified these professional expectations and what it means (and doesn’t mean) for you, your institutions, and our students.

Session: So You Think You Know Veterans: Serving the Student...Not the “GI Bill Recipient”
Location: Ballroom D
Presenter(s): Andy McCarty, Director of Veteran and Military Services, Northeastern University
Facilitator: Darrin Rooker, Director of Financial Aid, New York Chiropractic College
Session Description: Veterans and servicemembers are humans, too. You’ve learned about the GI Bill, the Yellow Ribbon Program, Vocational Rehabilitation, etc. But do you know how to engage with the person behind the benefit? Are you as comfortable speaking with a veteran or servicemember as you are with any other family who needs your help understanding the aid process? You can be!

Session: Consumer Information – Is Your School up to Date?
Location: Heritage
Presenter(s): Brenda DiSorbo, Director of Financial Aid, Hood College
Facilitator: Ken Ferus, Associate Director/Data Management, Rhode Island College
Session Description: Presentation on what information schools need to include to be in compliance with consumer information page.

Thursday, May 21, 2:15 – 3:30
Session: Income Driven Repayment and PSLF – What You Need to Know Now!
Location: Vanderbilt
Presenter(s): Michele Kaminski, Touro Law Center and Stephen Brown, Fordham Law School
Facilitator: Pamela Rossi, Assistant Director of Financial Aid, New England Institute of Technology
Session Description: Headlines are screaming that student loan borrowing is out of control. Even before this expansion in borrowing, Congress implemented Income Driven Repayment Plans and Public Service Loan Forgiveness (PSLF). Democrats and Republicans alike are supporting IDR programs as we go into Reauthorization. They have competing visions of PSLF – reducing eligibility versus taxing benefits. Students and graduates are relying on these programs and are turning to us to help them understand them. This session will present details of these programs as of May 1, 2015 and look into the future as informed by Reauthorization, Executive Orders or Congressional action.

Session: Federal Session: Basics of Direct Loans – Credit Hours and Standard Terms
Location: Ballroom C
Presenter(s): Zack Goodwin, Training Officer FSA, US Department of Education
Facilitator: Sarah Mariner, Associate Director of Financial Aid, Johns Hopkins University
Session Description: Federal Direct Loans are the most commonly-awarded type of Title IV federal student aid. The rules for awarding Direct Loans are different from other FSA programs and are impacted by the academic calendar at a school. In this session we will discuss the requirements for awarding Direct Loans for programs offered in credit-hours.

Session: Collaborative Partnerships: Improving College Access in Your State
Location: Ballroom D
Presenter(s): Joni Petschauer, Senior Fellow, American Council on Education
Sharon Hassan, Executive Director, College Goal Maryland
Susan Oskin, Specialist, Career & Technology Education Instructional Branch, Maryland State Department of Education
Richard Scott, Specialist, School Counseling, Maryland State Department of Education
Edrika Hall, STEPS GEAR UP Project, Prince George’s County Public Schools
Facilitator: Scott Atkinson, Director of Enrollment Services, The College of Brockport, SUNY
Session Description: Multiple efforts, on both the state and national level, are focused on breaking down barriers to college access. As a result, partnerships are essential to increase college effectiveness and maximize results. This session explores the collaboration between College Goal Maryland and Maryland College Application Campaign in facilitating a conversation among statewide educational stakeholders as they seek to improve the number of first-generation, low-income, and students of color who submit a college application and identify the necessary funding to enroll in post-secondary education. Maryland’s implementation framework is a model that other states might seek to replicate. 1. Participants will understand the collaborative role and impact of two state-level partners in achieving educational attainment goals 2. Participants will learn about College Goal Maryland and Maryland College Application Campaign 3. Participants will learn about the American Council on Education’s American College Application Campaign.

Session: Red Herring or Red Flag
Location: Heritage
Presenter(s): Kate Gentile, Senior Associate Dean of Financial Aid, Amherst College
Jim Tilton, Director, Office of Financial Aid, Brown University
Facilitator: Bob Shorb, Executive Director/CEO, The Tuition Exchange
Session Description: There are those financial aid applications that completely stop us in our tracks; something about this doesn’t add up. So is this a Red Flag (inconsistent information in the file and demands attention) or a Red Herring (something that demands attention, but may be intentionally diverting our attention)? This session will provide summaries of case studies that appear straightforward, but further review suggests hidden resources, more questions to the family, are there biases based on the type a particular type of student or family? Do the benefits for researching the apparent discrepancy worth the staff time, student/family frustration, etc. Possible discussion questions: What is it about the information that is raising the issue? Are you over reacting to general information? Is this an issue of equity for all students? How much time should be spent investigating? Is the investigation worth the time?

Thursday, May 21, 3:45–5:00

Session: Federal Session: FSA Assessments: A Tool to Enhance Compliance
Location: Ballroom C
Presenter(s): Zack Goodwin, Training Officer FSA, US Department of Education
Facilitator: Sue Farnum, Associate Director, Brown University
Session Description: This session will show schools how to use the web-based FSA Assessment tool to identify a compliance issue, develop a plan to fix the issue, monitor implementation of the plan, and ultimately be better prepared for audits and program reviews. We will walk through the process using the assessments and identified compliance issues related to verification, conflicting data, Return of Title IV funds, and institutional eligibility.

Session: A New Campus: Adaptable NSLDS Data Approach to Student Retention
Location: Ballroom D
Presenter(s): Patricia Thompson, Assistant Vice Chancellor, Student Financial Aid Services
Michael Williams, Project Research, State University of New York System Admin
James Trimboli, Director of FA, SUNY Niagara County CC
Facilitator: Allene Begley Curto, Associate Director of Financial Aid Services, Springfield College
Session Description: This session will describe how SUNY, the largest comprehensive university system in the United States, developed a campus adaptable, student engagement-retention model using integrated day-to-day NSLDS data and an in-house developed student email delivery platform. The System and Campus presenters will discuss the step-by-step process for replicating this collaborative campus initiative; including the industry acknowledged research used to support the intrusive student outreach approach to student retention and default prevention. The session will also include examples of customized campus communications generated by an in-house email platform upon receipt of NSLDS uploads.

Session: Your School has a Facebook Account and Twitter Profile, Now What?
Location: Heritage
Presenter(s): Tameka Easter, Director Social Media, Sallie Mae
Anya Ilkys, Director of Student Financial Literacy, Northeastern University
Facilitator: Melodie Loughney, Assistant Director of Financial Aid, New York Chiropractic College
Session Description: This session is designed to equip you to take your social media strategy to the next level. We will look at ways to increase engagement and grow your audience. We will provide time-saving best practices that will help you be more effective on social media. Whether social media is new on your campus or has been around for a while, you will leave with at least one action to use immediately: #BetterResults #LessTime