Conference Breakout Sessions Descriptions

Sunday, May 7, 2017, 4:00-5:15

Session: Student Data Sharing – A Navigational Guide for Financial Aid Officers
Location: Adirondack C/D
Presenter(s): Rebecca Flake, Senior Manager of Higher Education Services, Cooley, LLP
Moderator: Rich Neilsen, Education Loan Program Manager, NHHELCO
Session Description: The Financial Aid Office houses a vast amount of student data that could be helpful to many offices across campus and to outside entities. In this session, we will discuss the two important federal laws that govern the release of various types of student data commonly held by financial aid offices, along with real-world examples and best practices for developing effective institutional protocols to ensure consistent and compliant data release processes. We will also share tips on how to work with data requesters to be responsive to requests and compliant with the rules.

Session: A View In to Today’s Private Student Loans
Location: Lake Champlain B
Presenter(s): Donna Shelby, Vice President, Citizens Bank Student Lending
Moderator: Julie Rehder, Director, Business Development, ELM Resources
Session Description: Explore today’s private student loans and why they can be a good alternative for families seeking financing. Affordability and value are major concerns today and many families are not necessarily seeking financial 'aid', but are in need of financial 'knowledge'. Learn how private loan lenders have improved their product offerings that include innovative borrower benefits and features. After maximizing Federal Direct Student Loans, families deserve comprehensive information on financing options. Flexibility in term options, ease of process, and the opportunity to obtain a less expensive loan are just some reasons why families are pursuing private loans. Learn how to discuss options with your families and empower them in their search for affordable financing. Private Alternative Loans have come a long way over the past ten years! Learn how private loans have improved and why it’s important to your students and families.

Session: Getting to the Peak of Conflict Management
Location: Montpelier B/C
Presenter(s): Susan Kolls, Associate Director, Student Account Services, Northeastern University
Moderator: Greg Davis, Director of Financial Aid, Champlain College
Session Description: Most of us strive to avoid conflict in our lives, but as managers or financial aid counselors we often find ourselves in contentious situations. Conflict can arise when working with parents, colleagues, employees and students, and around issues ranging from admission to SAP appeals, to office politics, and beyond. Handling conflict can be difficult for all – from supervisors to new counselors. Without resolution, conflict can cause stress and make our work more difficult to accomplish. In this session, we will take a look at some theory related to, and specific strategies for, dealing with, conflict, including the use of conflict resolution techniques that will allow us to embrace conflict as a way to move forward.

We will first examine types of conflict and conflict theory focusing on direct conflict, referred conflict and beyond. We will then apply these types to specific conflict examples from higher education and managing in higher education, with the idea of empowering new and seasoned counselors, managers and higher education professionals with the means to manage conflict better, regardless of the type of conflict or setting. We will provide a method of conflict coping designed to help ease any situation fraught with conflict tension. Through example we will show how to use this strategy and then allow time for trouble-shooting conflicts brought up by the group.
Session: Comparing Income Driven Repayment Plans  
Location: Lake Champlain A  
Presenter(s): Wynette Zuppardi, Director of Financial Services, Brown University  
Moderator: Erin Wilborn, Associate Director of Financial Aid, Southern New Hampshire University  
Session Description: The growth of the number of payment plan options, including those based on income, leaves borrowers with many options -- sometimes too many! An income-driven repayment (IDR) plan can help stretch budgets and minimize payments, but what are the pros and cons? How do borrowers identify the repayment option best for them? This session will cover IDR plan details and scenarios, including the $0 payment conundrum.

Session: 5 Simple Steps to Managing Stress In Your Life  
Location: Lake Champlain B  
Presenter(s): Tami Gilbeaux, Director, Strategic Business, Inceptia  
Moderator: Anna Clifford, Senior Financial Aid Specialist, Southern New Hampshire University  
Session Description: Whether we like it or not, stress is an everyday occurrence in just about everybody’s life. Let’s face it: higher education professionals are exposed to stressful situations on a daily basis. But, that’s okay. Yes, really. Experts agree the right amount of stress can actually fuel your energy level, creativity and productivity. So, the question is how do you find, and operate at, your optimum stress level without experiencing the psychological and physiological effects of stress (e.g. anxiety, fatigue, tension, emotional outbursts, and inability to relax). Although stress cannot be totally eliminated, there are steps you can take to handle it correctly, ultimately having it make a positive impact and helping you achieve a sense of balance. During this session, we will discuss some of the major causes of stress in the workplace, the effects stress can have on your body, as well as ways to get a better handle on the stress you are facing. We’ll also share with you five simple steps to help you better channel the pressure you are experiencing.

Session: Online Graduate Landscape: Exploring The Impact of Online Education on Graduate Professional Education  
Location: Montpeller B/C  
Presenter(s): Melody DeFlorio, Director of Financial Aid, Vermont Law School  
Moderator: Chris Earnshaw, Director of Business Development, Sallie Mae  
Session Description: Institutions are adding new online graduate programs at a record rate. Often times the administration is trying so hard to keep up with these trends, they act first and ask questions later. The Financial Aid Office is left figuring out the impact of these programs on the institution’s Title IV eligibility. This session explores what challenges we are facing, how to present this information to your Deans, and the dance we must do to support institutional initiatives without compromising Title IV eligibility. More and more institutions are looking to online graduate programs as a way to increase enrollments. Is your office keeping up with the demands of this changing landscape?

Session: 8 Big Ideas For Student Retention  
Location: VT Conference Room  
Presenter(s): George Covino, Vice President Student Success, Student Connection  
Moderator: Stacy Schenk, Director of Financial Aid, Mount Aloysius College  
Session Description: Increased transparency and a greater focus on outcomes are leading to new strategies aimed at improving student retention and, ultimately, graduation rates. This interactive session will explore eight ideas that are proven to be effective at boosting retention rates. Participants will have the opportunity to share strategies that have worked at their institutions. This interactive session will explore eight ideas that are proven to be effective at boosting retention rates.

Monday, May 8, 2017, 11:30 – 12:45

Session: 5 Must-Haves for Modern Financial Aid  
Location: Lake Champlain A  
Presenter(s): Mark McGinnis, VP of Business Development, Campus Logic  
Moderator: Robyn Hughes, School Ombudsman, Navient  
Session Description: Fact-students are glued to their mobile devices. Fiction: Financial Aid isn’t mobile. Rather than waiting for students to look up from their gadgets, Financial Aid Offices need to get in front of them where they live: their phones. Modern Financial Aid is the solution. In this interactive session you’ll experience first-hand how paperless file review, automated student follow-up including SMS/text-messaging and email, and automated file indexing and imaging can change your institution’s entire approach to financial aid. Hear about the dramatic impact personalized mobile-optimized web-form wizards, automated updates, e-signature, and secure document upload from any device will have on your student experience.
Session: Stay With It: Applying Diversity Awareness to Your Living Case Study
Location: Lake Champlain B
Presenter(s): Dr. Shaunna Payne Gold, Associate Director, Assessment & Student Development, University of Maryland
Moderator: Sarah Mariner, Associate Director of Financial Aid, John Hopkins University
Session Description: This breakout session is a follow up session to the keynote general session by Dr. Shaunna Payne-Gold. You’ll have the opportunity for some hands on work with Dr. Gold in the form of case studies in small groups with your colleagues! These real-life case studies concerning complex multiple identities issues will assist to further increase your awareness and ability to improve student persistence to graduation and to make your workplace a more receptive and effective environment for everyone.

Session: So We Have a New President – What Grad/Prof Students Can Expect From The New Administration
Location: Montpelier B/C
Presenter(s): Betsy Mayotte, Director of Consumer Outreach and Compliance, American Student Assistance
Moderator: Odette Franceskino, Director of Financial Aid, Quinnipiac University School of Law
Session Description: Post-election political update with a look at Public Service Loan Forgiveness and possible legislative changes that could impact Graduate and Professional students.

Session: Helicopters, Lawnmowers, and Snowplows
Location: VT Conference Room
Presenter(s): Susan Kolls, Associate Director, Student Financial Services, Northeastern University
Moderator: Joe Jovell, Senior Marketing Associate, Great Lakes
Session Description: From Igor Sikorsky’s original design to initial construction, the helicopter was envisioned as a tool for good – designed to bring aid and comfort. The function of the helicopter has changed over time, and, when applied to the parents of college students, became negative. These parents, however, have garnered respect of late, when compared to their more forceful, and destructive, lawnmower and snowplow compatriots. These parents are helping colleges and universities see the helicopter parent as an ally – and are seeking ways to bring the helicopter back. This presentation will briefly examine the history and purpose of this varied machinery – and how it has morphed into labels for our parents. We will examine the history of parents of college students as well – as helicopter parenting is not necessarily a new concept. In this age of immediate response and higher expectations, however, we also need to examine why the parent label has changed and if there is validity to the idea of the lawnmower or snowplow parent. We will examine how higher education is responding to this new trend of involved parents, and will provide response strategies for advisors. Come to this fun and interactive session for a new take on the tools needed to keep our parents and students in excellent working order.


Session: Federal DOE Session: Verification & 2017-18 Conflicting Information
Location: Lake Champlain A
Presenter(s): Pam Gilligan, Training Officer FSA, US Department of Education
Moderator: Kerrie Cooper, Director of Financial Aid, SUNY-Canton
Session Description: This session will include a discussion of the verification requirements for the 2017-18 FAFSA cycle and details on the institutional resolution of conflicting information between the 2016-17 and 2017-18 FAFSAs.

Session: Stay With It: Applying Diversity Awareness to Your Living Case Study
Location: Lake Champlain B
Presenter(s): Dr. Shaunna Payne Gold, Associate Director, Assessment & Student Development, University of Maryland
Moderator: Sarah Mariner, Associate Director of Financial Aid, John Hopkins University
Session Description: This repeat breakout session is a follow up session to the keynote general session by Dr. Shaunna Payne-Gold. You’ll have the opportunity for some hands on work with Dr. Gold in the form of case studies in small groups with your colleagues! These real-life case studies concerning complex multiple identities issues will assist to further increase your awareness and ability to improve student persistence to graduation and to make your workplace a more receptive and effective environment for everyone.

Session: Creating a Culture of Financial Well-Being
Location: Montpelier B/C
Presenter(s): Jennifer Schott, Director, Education Services, AccessLex Institute
Moderator: Leslie McSweeney, AVP-Campus Relations Manager, PNC Education Lending
Session Description: Today’s graduate and professional students often face a challenging financial puzzle. Between high student loan debt, uncertain job prospects, and limited in-school work opportunities, financial stress levels can be significantly high and impact
academic success. Creating a culture of financial well-being to ensure your students have the knowledge they need to make good decisions both today and in their future careers is good for both students and your institution. In this session you will learn strategies for creating this beneficial culture and gain a practical financial understanding that will allow you to provide meaningful advice to your graduate and professional students along their journey.

**Session:** Your Financial Aid Director – What You Don’t Know  
**Location:** VT Conference Room  
**Presenter(s):** David Sheridan, Director of Financial Aid, Columbia University School of International and Public Affairs  
Tony Erwin, Associate Vice President of Enrollment Management, Northeastern University  
Adrienne Montgomery, Director of Financial Aid, Merrimack College  
**Moderator:** Donna Shelby, Vice President-Student Lending, Citizens Bank  
**Session Description:** This session will explain what a Financial Aid Director is responsible for on any given day. The areas that will be covered includes: - Staying up to date with changing regulations/compliance issues - Federal Reporting (FISAP, Gainful Employment etc.) - Budget - Collaborating with other offices - Maintaining a positive relationship with senior leadership - Hiring – Developing your team - Personnel Matters - Evaluations - AND MORE! Is your goal to become a Financial Aid Director? Or, do you ever wonder what your director is doing behind closed doors? This session will take you into the world of a Financial Aid Director and give you a glimpse of what they do both inside and outside of the “norm”. From maintaining compliance and federal reports, to managing personnel issues and upper management, this session will take you through it all!  

**Tuesday, May 9, 2017, 8:30 – 9:45**

**Session:** From 108 Questions to a Postcard with Two; What Should the Next Version of the FAFSA Look Like?  
**Location:** Lake Champlain A  
**Presenter(s):** Justin Draeger, President & CEO, NASFAA  
Melanie E. (Corrigan) Storey, Senior Director, Higher Education & Student Aid Policy, College Board  
Dawn Lowe, Director, Financial Aid Services, Howard Community College  
Gail Holt, Dean of Financial Aid, Amherst College  
**Moderator:** Jim Anderson, Director of Financial Aid, Montclair State University  
**Session Description:** FAFSA Simplification. Senator Lamar Alexander (R-TN) and Senator Michael Bennett (D-CO) released a proposal in 2014 which would eliminate the FAFSA and replace it with a two-question postcard, asking only for household size and Adjusted Gross Income. The Obama administration also released a proposal shortening the existing FAFSA by 30 questions. NASFAA then convened a working group of financial aid professionals to look at this issue which resulted in a FAFSA Simplification proposal that would involve a three-level application process. The NASFAA proposal would provide for a very simple process for families receiving benefits from certain government programs, to a form for non-tax filing families that would ask only for information on non-taxed income and child support received (no asset questions) to a more traditional, but still simpler form for tax-filing families. A distinguished panel of experts and colleagues will offer their assessment of these proposals followed by an active Q & A.

**Session:** Payments to Students – Tracking and Proper Management  
**Location:** Lake Champlain B  
**Presenter(s):** Marie Johnson, Director of Student Financial Services, University of Vermont  
Kimberly Meilleur, Scholarship Administrator, University of Vermont  
**Moderator:** Misty Myre, Regional Director, Campus Logic  
**Session Description:** See how the University of Vermont has tackled the challenge of identifying when students have received something from the University and how they have developed guidance and created a decision tree to guide initiating departments in understanding how various ‘payments’ (gifts, incentives, scholarships, awards, items, research support, conference travel) must be processed in order to be appropriately taken into consideration for financial aid and/or tax purposes. See the process the University of Vermont has put in place to capture those ‘payments’ that must be considered for financial aid purposes.

**Session:** Lost In Translation: The Unspoken Financial Challenges Faced by International Students in the U.S.  
**Location:** Montpelier B/C  
**Presenter(s):** Mike Davis, Chief Technology Officer and Co-Founder, MPOWER Financing  
Kevin McNamara, Director of University Relations, MPOWER Financing  
**Moderator:** Karen Sokol, Assistant Dean for Enrollment Services, Seton Hall University-School of Law  
**Session Description:** When the American Dream begins on your campus, the hurdles faced by your international students can be as unique as their backgrounds. This session features a first-person account from a former refugee who now runs a company that assists international students, as well as an open forum to discuss the available options; both domestic and international, students have to top up their education funding.
Session: Rebranding the Financial Aid Office: From Cruel to Cool  
Location: VT Conference Room  
Presenter(s): Jennifer Mertz, Financial Aid Director, Lehigh University  
Jason Shumaker, Senior Associate Director of Financial Aid, Lehigh University  
Moderator: Lisa Talbot, Director, Business Development, Sallie Mae  
Session Description: The financial aid office is often misunderstood by our colleagues and is a point of frustration by families. This session will discuss some of the methods that our office has used, as well as some of the solutions that we have implemented to combat the negative stigma that can be associated with the financial aid office and our processes.

Tuesday, May 9, 2017, 11:45 – 1:00

Session: Federal DOE Session: Administering Adds, Drops and Withdrawals  
Location: Lake Champlain A  
Presenter(s): Pam Gilligan, Training Officer FSA, US Department of Education  
Nancy Chalker, Vice President-Sales and Marketing, ihelp Student Loans  
Moderator: Brian Lemma, Associate Director of Financial Aid, Georgetown University  
Session Description: This session will address the activities a financial aid administrator must perform when a student adds or drops courses as well as when a student withdraws (excluding R2T4 calculation). Discussion and case scenarios will be provided concerning recalculation rules and census dates in various situations as students add and drop courses. This session will also provide an in-depth explanation concerning student withdrawals n such topics as school attendance, official and unofficial withdrawals, determining the date of withdrawal, and reporting deadlines.

Session: Yield and Retention: The Impact of Financial Aid on Student Success and Enrollment Management  
Location: Lake Champlain B  
Presenter(s): Lisa Blazer, Senior Associate Vice President for Student Affairs, University of Texas at San Antonio; and NASFAA National Chair  
Moderator: Brian Lemma, Associate Director of Financial Aid, Georgetown University  
Session Description: Across our institutions, the role of financial aid has shifted from equity awarding to strategically awarding to have a greater impact on yield and retention. How much financial aid should we award to students to better impact student success and institution enrollment goals? How can we create need-based and merit-based programs that help create access as well as influence student success? This session will focus on the paradigm shift happening in financial aid and how financial aid administrators can become better equipped to participate in and lead conversations about enrollment management.

Session: Graduate and Professional Concerns Town Hall  
Location: Montpelier B/C  
Presenter(s): Meredith Schor, Director of Medical School Financial Aid, George Washington University-Medical School  
Darrin Rooker, Director of Financial Aid, New York Chiropractic College  
Facilitator: Brian Lemma, Associate Director of Financial Aid, Georgetown University  
Session Description: Open forum to discuss issues of importance to the Graduate and Professional Community including, but not limited to: advocacy for graduate students/HEA, PSLF, debt management and accreditation, etc.

Session: The Art of Explanation  
Location: VT Conference Room  
Presenter(s): Justin Draeger, President & CEO, NASFAA  
Moderator: Larry Chambers, Director of Financial Aid, Rochester Institute of Technology  
Session Description: Improve your explanation skills with some quick tips and ideas developed by author Lee LeFever, founder of Common Craft, which helps make complex ideas easy to understand. NASFAA President Justin Draeger will guide you through the “art of explanation!”

Tuesday, May 9, 2017, 2:30 – 3:45

Session: Identity Theft and Fraud Prevention in Higher Education: What Every Financial Aid Office Needs to Know  
Location: Lake Champlain A  
Presenter(s): Kevin Pietrowski, Assistant Vice President, Student Financial Services, Southern New Hampshire University  
Maureen Fagen, Director of Business Development, Sallie Mae  
Moderator: Donna Stevens, Supervisor-Financial Aid Counselor, University of Vermont  
Session Description: Protecting student identity/privacy is essential in administering student aid. In this session we’ll discuss the processes one institution has taken to safeguard student privacy and detect the ‘red flags’ of fraud in the student aid process. A Sallie Mae representative will then share the steps required in reporting identity theft and fraud to authorities, credit bureaus and creditors and how liability from loss can be limited. How one institution is working to detect and prevent identity theft and fraud.
Session: Student Enrollment Reporting Requirements for Regulatory Agencies
Location: Lake Champlain B
Presenter(s): Marjorie Arrington, Higher Education Services Senior Advisor, Cooley, LLP
Andrea Kemp-Ford, Director, Financial Aid and Compliance, University of the Potomac
Moderator: Dan Dreves, Director of School Partnerships, FATV
Session Description: Institutions are required to report student enrollment information to the triad: state licensing bodies, accreditation associations, and Federal government (various agencies). The session will provide an explanation of what information, how information is reported and why schools that participate in the HEA, Title IV programs are required to report enrollment data. In addition, the session will cover the similarities and variances in the information reported and the impact on a student’s enrollment eligibility status. This session will provide an explanation of the enrollment reporting requirements that schools are required to comply with for: state licensing bodies, accreditation associations, and Federal government (various agencies).

Session: The Graduate/Professional Financial Education Landscape
Location: Montpelier B/C
Presenter(s): Jennifer Schott, Director, Education Services, AccessLex Institute
Melaney Wald, School Services Representative, VSAC
Moderator: Session: This session will share the findings from a survey on graduate and professional school financial literacy programming collected by NASFAA and Access Group in 2014 and 2016. The exciting news is many graduate and professional schools are engaged in initiatives related to financial education. Learn about the various ways institutions have implemented programming - including what topics are offered, how programs are structured, who participates and/or supports programming across campus, what resources are used and how they measure success. Walk away with new ideas to help support your own efforts on campus - whether you are looking for ways to create buy-in, new programming ideas, or outcome measures to consider.

Session: Lions & Tigers & Bears, Oh My! Managing a Large Scale Financial Aid Office
Location: VT Conference Room
Presenter(s): Cheryl Storie, Associate Vice President of Financial Aid, University of Maryland University College
Brian Berry, Assistant Vice President of FA Student Services and Outreach, University of Maryland University College
Moderator: Alan Shashok, Training & Compliance Coordinator, Student Financial Services, University of Vermont
Session Description: UMUC is fairly unique. We are a massive, predominantly on-line State institution that serves students worldwide. We teach face-to-face in dozens of countries all over the world while offering hybrid and on-line courses statewide. Our academic calendar is modules within terms and our students come and go; often because of deployments. Our population is adults, with military service members along with their dependents and spouses making up over 50% of our population. We are open enrollment and very diverse. We are highly entrepreneurial and fast-moving; change comes quickly and we must be quick on our feet to remain compliant with regulations while supporting the goals and mission of the institution. There is never a boring day! Large offices have additional challenges beyond compliance and excellent student service. How do you handle the complexities of 142,000 ISIRs and 90,000 students? The workload is staggering and the staff is enormous -- how do you keep everything running smoothly and in compliance? Listen to our story and share yours!

Tuesday, May 9, 2017, 4:00–5:15

Session: Federal DOE Session: NSLDS Enrollment Reporting
Location: Lake Champlain A
Presenter(s): Pam Gilligan, FSA Training Officer, US Department of Education
Moderator: Kimberly McCurdy, Higher Education Access Partner-Allegheny County, PHEAA
Session Description: Over the past few years, significant changes were made to the way schools report enrollment to the Department. NSLDS has begun tracking Enrollment Reporting Statistics so that schools can see how they’re doing with reporting enrollment data, specifically at the Program Level. This session will discuss new tools NSLDS has implemented which institutions can use to improve their Enrollment Reporting Statistics, common errors and how to prevent them, and what’s ahead in the year to come.

Session: Developing Successful Student Employees With-in Your Financial Aid Office
Location: Lake Champlain B
Presenter(s): Rebecca Bentley, Administrative Manager & Financial Aid Officer, University of Connecticut
Shannon Gallagher, Associate Director of Financial Aid, Rhode Island School of Design
Moderator: Session Description: Can student employees be beneficial in your financial aid office? Do you currently staff with student employees and want to improve their value in your office? Learn how to develop success in your student employees beginning with the hiring process, training, and cultivating continuous improvement that can be a key ingredient in your office’s success. Learn how student employees can be a key ingredient to the success of your financial aid office.
Session: Transitioning Your Students Into Student Loan Repayment
Location: Montpelier B/C
Presenter(s): Robyn Hughes, School Ombudsman, Navient
Moderator: Katrina Delgrosso, Director of Financial Aid Solutions, The College Board
Session Description: You need help, we have resources. As a federal loan servicer, Navient provides tools, resources and expertise to help guide your student loan borrowers through successful repayment strategies. This session will provide attendees will practical, relevant information to share with students such as simple interest accrual, billing cycles and interest capitalization by change in loan status. We will also provide an in-depth look at the 10 things a borrower should do before making a first loan payment and share student borrower success stories.

Session: #GoingSocial: Increasing Awareness of Educational Funding Opportunities Through Social Media
Location: VT Conference Room
Presenter(s): Paul Aries, Regional Vice President, Nelnet Business Solutions
Moderator: Edward Hill, AVP-Campus Relations Manager, PNC Education Lending
Session Description: Millions of students and parents are active on social media sites, yet only 30% of financial aid professionals report using social media to inform families about educational funding opportunities. In spite of limited time and staffing resources in financial aid and business offices, executing a social strategy can help reduce phone calls in the office, increase credibility with families, monitor student and parent concerns, and raise awareness about educational funding for students. As a result of participating in this session, attendees will feel more comfortable implementing a social media strategy and will learn:
• Why social media is an effective and efficient way to reach students and parents.
• Tips on introducing a social media plan for employees who are new to social media.
• Tips on improving an existing social media plan.
• Which institutions to look to for examples.
• Which resources can help streamline your social strategy.
In spite of limited time and staffing resources in financial aid and business offices, executing a social media strategy can help reduce phone calls in the office, increase credibility with families, monitor student and parent concerns, and raise awareness about educational funding for students.