

Wednesday

8:00 – 9:00 AM Breakfast
Grand Ballrooms II - IV

9:00 AM – 12:15 PM & 2:15 PM – 5:00 PM Exhibitor Area Open
Grand Ballroom I

9:30 AM -10:30 AM Concurrent Sessions

How to Break into the Financial Aid Consultant Field

Boxford Room

Presenters: Paul Baker, Direct Financial Aid Professional Services

Lindsay Carlisle, Consultant

Jamey Palmieri, High Education Assistance Group

Boxford Room

Do you currently work in financial aid on a college campus and have been thinking about breaking out on your own? Well, this is the session for you! A panel of financial aid consultants will give you some tips on breaking into the field and some helpful tips they have found working as consultants.

The Role of the Office of the Inspector General

Ipswich Room

Presenters: Theresa Murray, DOE

Mark Deckett, DOE

Presenters will define the role of the U.S. Department of Education-OIG, Investigation Services. Topics include identity theft, social engineering and lessons learned from previous investigations.

The Tax Detective 1

Newburyport Room

Presenter: Jim Briggs, The Tax Detective

This session will cover a review of verification and valuation issues found on the Federal tax return, Schedules C and E. Includes a discussion of rental property, S-Corporations, Partnerships and LLC's. How is the AGI affected by these schedules? Bring your questions..

Exploring the New Student Services Trail

Gloucester Room

Presenters: Scott Jewell, Lesley University

Tom O'Hare, Salliemae

Sandra Coswatte, Lesley University

Tombstone, Dodge City and Santa Fe all lay claim to the early days of delivering services. Back in those days, it was rough, but as new trails were blazed the practices of the early west were soon replaced by new technology and business models. Attendees will look at how the business of delivering student services has changed and how in the "Star Wars" era innovation is the key. So jump on your horse and get ready to replace your six shooter with a new "light saber"!

Spanish Speaking Families and Financial Aid

Marblehead Room

Presenters: Michele Tufau, Wellesley College

Paul Lynskey, MEFA

Loida Feliz, Harvard University

Sonia Gomez-Barney, UMASS Boston

Spanish speaking residents comprise the fastest growing major segment of our population. Panelists, with extensive financial aid experience, will present critically helpful information that can be very useful to FAOs who will be working with Spanish speaking families. Discussion will focus on cultural and language issues, first-generation college students, and valuable NEW resources to assist these families with the financial aid process.

10:30 AM – 11:00 AM Break

Exhibitor Area

Ballroom I

11:00 AM – 12:00 PM Concurrent Sessions

The Tax Detective II

Newburyport Room

Presenter: Jim Briggs, The Tax Detective

How to review Subchapter S and Partnership returns along with their related Schedule K-1's. Bring your questions and most troublesome cases to this interactive discussion.

How to talk to Your Techie!

Ipswich Room

Presenter: John Panzica, Community College of Rhode Island

How do I talk with IT? This session will review how to communicate with your technology department.

You NEVER told me that! Reaching Students who Don't Read

Boxford Room

Presenters: Mary Beth Courtright, Massasoit Community College

Hannah Morrison, Massasoit Community College

Kate Connelly, Massasoit Community College

Are you frustrated by students who don't read financial aid materials? Tired of students claiming "You never told me that!" Do you wish there was a way to make all those rules and regulations more understandable to students? Then this session is for you! See how one office implemented the FISH! Philosophy and used information about the Millennial Generation to reach out to students. Come ready to share your ideas with us. The more the merrier!

Mentoring and Motivating Staff

Gloucester Room

Presenter: Jennifer Houseknecht, EDFUND

Are you the spark that ignites?

Good leaders set examples. Great leaders motivate and inspire. How do you recognize the talents and skills that reside in your staff? More importantly, how do you inspire them to use their talents and skills to become all they can be? Learn techniques for mentoring, motivating, empowering and coaching your team to a winning season!

The First Year Experience

Marblehead Room

Presenters:

Linda Mularczyk, Mount Ida College

Dylan Niland, Mount Ida College

Tom King, Mount Ida College

Phyllis Foote, Mount Ida College

Learn how a four year private school developed and implemented a "First Year Experience" model that increased retention, counseling, financial aid awareness and improved customer service.

12:15 PM – 2:15 PM Lunch with Liz Walker

Ballrooms II - IV

2:30 PM – 3:30 PM Concurrent Sessions

Rebuilding your Student Employment Program

Newburyport Room

Presenters: Kelley Baran, Bentley College

Donna Kendall, Bentley College

If it ain't broke, don't fix it! That phrase easily described the Student Employment program at Bentley College for the last several years. However, recent changes to the supply and demand for student jobs on campus led to a need for some intense examination of the causes of the problem and creative ideas for solving them. The Financial Aid staff turned to Six Sigma, a disciplined, data-driven approach and

methodology for eliminating defects in a process, to reconstruct their on campus employment program. Not only did they find solutions to the problems, but the on-campus employers and students are pleased with the new process. Bentley staff will share their experience of working with a faculty member trained in the Six Sigma method and the results of their 6-month process improvement project.

Does Your Website Comply with the American Disability Act (ADA)?

Ipswich Room

Presenter: Dan Clawson, The Center for Affordability

Does your institution's website and specifically your financial aid website and web pages promote and enhance access to higher education by delivering quality student financial aid information and services to all students-including those with disabilities? If you do not know or are not sure, then you should attend this informative session on how to make your website compliant with the American with Disabilities Act (ADA) Guidelines. We will demonstrate how to make sure that all students can find and utilize your most important institutional and financial aid information.

What About the Middle Class?

Gloucester Room

Presenter: Scott Prince, MEFA

How do middle class families afford a college education? This session will look at three perspectives on this important topic including a high school guidance counselor's role in preparing these families for college and a look at financing options for middle class families at both public and private colleges here in Massachusetts.

Streamlining the Alternative Loan Process

Boxford Room

Presenters: Patrick Ziegler, Great Lakes Educational Loan Services

Sean Rafferty, Great Lakes Educational Loan Services

Alternative loans are becoming a more integral part of your job as a Financial Aid Officer. In addition to helping students navigate through the deepening sea of private loan offerings, you also need to find ways to help your students apply for these loans while managing your in-house certification process. Join us as we look at some of the ways you might streamline the application and certification process in order to improve your efficiency and enhance your students' experiences.

Gender Blender

Marblehead Room

Presenter: Jennifer Drummond, Nelnet

Have you realized that men and women are different? Well, they are! In this workshop we will explore those differences and how they impact your workplace and your personal

lives. Come and discuss with us the gender traits and trends that we all know exist, but are often afraid to talk about.

3:30 PM – 4:00 PM Break

Exhibitor Area

Ballroom I

4:00 PM – 5:00 PM Concurrent Sessions

Promoting an Affordable Consumer Experience

Newburyport Room

Presenter: Maureen McCarthy Mello, The Center for Affordability

What is it like on the other side of the financial aid experience? Hear about what we have discovered from working with students and families navigating the financial aid process. We have taken our various findings that have been cultivated from focus groups, surveys and our counseling practice and have developed a set of best practices to give your institution an edge in having your AFFORDABILITY messages HEARD and UNDERSTOOD.

Massachusetts College Goal Sunday Update

Boxford Room

Sherri Culp, Brandeis University

Gail Holt, Mount Holyoke College

The College Goal Sunday program, which helps first-generation and low-income students complete the FAFSA, is entering its second year in Massachusetts. This session will provide a review of last year's program as well as a preview of the program's plans for its second year.

Shazam! A Financial Aid Scam!

Gloucester Room

Presenter: Deborah Glenn-Long, CSLF

We often hear about government plans for reducing fraud and abuse in the federal financial aid programs, but what about the fraud and abuse families suffer at the hands of unscrupulous companies preying upon fears about college costs? There are a growing number of scam artists offering to help families "position" their income and assets before applying for aid and others who are willing to "negotiate" better awards for a nominal fee. And then there are the traditional scams related to scholarships and completion of the FAFSA. This session will provide an in-depth analysis of the scams being perpetuated upon families and strategies that financial aid professionals can use to help protect families.

Who Dis?

Marblehead Room
Presenter: Jason Kahn, CLC

When you get your coffee through the drive through, do you no longer wait for the employee to say thank you? Are you surprised when your call to the phone company is picked up within the first 10 minutes? Customer Service has declined over the years, thanks, in part, to technology. In this session, we will explore how to proactively change the face of customer service through a client overhaul. Exemplary service levels will actually increase employee production and customer satisfaction. Each attendee will leave with an individual blue print to change the way they deal with their internal and external clients.

Top 10 Financial Aid Pitfalls and How to Avoid Them
Ipswich Room
Presenter: Bradley Finger, ASA

Join us in this session to learn about the most common errors that are made in the Financial Aid Office. Notification, funding, verification, regulatory issues...hear about the most common mistakes and ways to correct them. Walk away with a checklist to take back to your office.

6:00 PM – 12:00 AM
Dinner with MASAA Awards Ceremony
Grand Ballrooms II - IV

DJ Entertainment
Line Dancing
Mechanical Bull
North Shore Ballrooms

Thursday, November 3, 2005

7:00 AM 30 Minute Morning Walk with Leslie Mills (weather permitting)

7:30 AM – 9:30 AM Breakfast (location ?)

8:30 AM – 9:30 AM State, EASFAA & AICUM updates

9:00 AM – 12:00 PM & 1:45 PM – 4:30 PM
Exhibitor Area Open
Ballroom I

9:30 AM - 10:30 AM Concurrent Sessions

Stop Putting out Fires and Improve your Overall Office Environment

Newburyport Room

Presenter: Brendon Sanger, Nelnet

Stop putting out fires and start realizing where the gasoline is coming from! Come discover new ways to look at your challenges, tackle your roadblocks and conquer the fear of change. Please bring a major “fire” from your office for discussion

Helping Students Get \$mart...Financially

Ipswich Room

Presenter: Kristi Jovell, Suffolk University Law School

Suffolk University Law School has implemented a comprehensive financial literacy program for our students called Get \$mart! This session will explain Suffolk's program and will provide a forum for others to share their success stories and to generate ideas for implementing a large or small scale program on your campus.

Bridging the Generation Gap:

Blogging, Portals and E-Notification

Gloucester Room

Presenters: Leah Barry, Boston University

Betsy Scola, Bentley College

Daniel Barkowitz, MIT

Come here your colleagues discuss how they are integrating the latest technologies in their financial aid offices. MIT used a blog this year to communicate with students, Bentley College has introduced a Portal and Boston University put it's complete acceptance package for freshman on-line this year. Staff from these offices will discuss how these technologies have improved and changed student service.

Tools to Be Cool While Others Act a Fool

Marblehead Room

Presenter: Pamela Britton, CLC

Are you concerned that civility is dead? Do you find it difficult when students, families, or other staff members express their anger? Do you lose sleep when anger events occur? This session provides tips on dealing with angry customers and learning not to take it personally!

It's Not Just About the Money

Boxford Room

Presenters: Rhonda Frank, Southern Regional Technical Institute

George Georgenes, Hellenic College

This session will examine the many different job responsibilities that are a big part of a financial aid professional's day. From managing on-campus housing to finding adequate shelter for their students, come learn about the many tasks and successes that at a smaller school.

10:30 AM – 11:00 AM

Break

Exhibitor Area

Ballroom I

11:00 AM - 12:00 PM Concurrent Sessions

Student Success: New Concepts in Debt Management and Default Prevention

Newburyport Room

Presenter: Gretchen Bonfardine, ASA

You've heard so much about the importance of debt management and default prevention. This session will offer some new insight and ideas on these topics. Come learn about new study results, exciting resources on the web, and new ideas for improving your students' success.

Volunteering to Lead -

Get Off Your Butt and Get Involved!

Boxford Room

Presenters: Anne Barton, EASFAA

Susan Howard, EASFAA

Kristi Jovell, Suffolk University Law School

Do you wonder if you've got "the right stuff" to be a leader? Volunteering as a leader in your state and regional professional association enhances your knowledge of student aid, enables you to meet new colleagues, and opens doors to new opportunities and experiences. In an era of "community service", what better way to expand your service to students and your profession? A panel of state and regional leaders will discuss the benefits of volunteering as a leader in professional associations, and ways you can begin and continue your involvement.

Assessing & Addressing Your IT Security

Marblehead Room

Presenter: Shawn Monk, ASA

Today, we are faced with issues relating to privacy and the protection of data. Now in addition to the FERPA standards we all know and love, we are faced with the Gramm-Leach-Bliley Act (GLBA). This session will explore how your IT security may be at risk and give you the tools to help ensure compliance for your department and your campus.

It's time to take control of technology by understanding why and where you are vulnerable and taking that first big step.

How to Jazz Up Your Powerpoint Presentations

Gloucester Room

Presenter: Michael DiRuzza, WPI

Looking for something to make those power point presentations a little more lively than the standard chart, picture or a bunch of words on a screen. Come learn how to add exciting effects to your presentations like motion and sound. Topics covered will include how to add effects to the text or pictures so they enter the slide in different ways. This session will also cover how to add sound effects (basic to customized) using WAV files. This course is intended for beginner to intermediate-level Power Point users who have a general knowledge of how to put together a Power Point slide.

From Financial Aid to College Funding – A New Paradigm

Ipswich Room

Presenter: Jack Girvan, EFC

What families and students often think is that they can not afford to attend college. They ask themselves..... How are we going to pay for this education? The answer that they most often hear is "take out loans." That is not the answer they want to hear.. The presentation will demonstrate how a family can increase their disposable income, improve their cash flow and be in a better financial position to afford to attend their college of choice. Colleges that show families how to pay for college should expect to see increased enrollment and improved student retention.

12:15 PM – 1:45 PM Lunch

Ballrooms II - IV

Networking with Your Colleagues

Business Meeting

2:00 PM - 3:00 PM Concurrent Sessions

Ramen Noodles Are Okay!

Newburyport Room

Presenters: Dino Koff, Vermont Law School

Michelle Chamley, Vermont Law School

Promoting fiscal responsibility to your students doesn't have to be dull. In fact, debt management and Ramen Noodles can go hand in hand! Come see how some of your colleagues approach financial awareness for their first-year students.

Financial Aid Jeopardy

Marblehead Room

Presenters: Julie Lawton, AFC
Beth Feinberg, Northeastern University
Kathleen Roebuck, AFC

This is Jeopardy! Get ready to test your financial aid knowledge in this game of wits against your fellow colleagues. Just like the television show, select a category and a money value to reveal the hidden “answer”. Come up with the correct “question” and you win the money, otherwise, your bank will take a hit. Guaranteed Fun!

Change Management
Gloucester Room
Presenters: Joe Lahoud, ASA
Pamela Walker, Salem State College

One thing you know for sure in the business world; change is inevitable. Don't burn out! This session will help you come out ahead with sound advice on managing change in your work life. The workshop focuses on the four different MBA approaches to change management as well the varying leadership and personality styles related to change.

Go With the Flows
Ipswich Room
Presenter: Nancy MacNeil, ASA

Do you ever wonder why you send some forms to the lender, some to the guarantor, and some to the servicer? Why you receive funds from many different institutions while another school receives all of their funds from just one place? What exactly does a guarantor do? What does a lender do? What does a servicer do? This session will bring to light the major FFELP players, loan processing flows, and the vocabulary involved with these flows. You will also gain an understanding of your current loan processes and be introduced to new tools to assist you in controlling and streamlining your processing.

What? When? How? Strategies for Reaching African American and Latino Families
Boxford Room
Presenter: Laura Gemery, The Sallie Mae Fund

As a follow-up to The Fund's 2003 "Information Divide" study, The Sallie Mae Fund commissioned The Tomás Rivera Policy Institute and the Frederick D. Patterson Research Institute of the United Negro College Fund in 2003 and 2004 respectively to conduct surveys of Latino and African American youth and parents. The goal of both surveys was to better understand how financial aid information affects the two largest minority populations in the United States and how best to improve access to that information in order to increase Latino and African American enrollments in higher education. Participants will learn how financial aid information affects African American and Latino college-going rates, how best to reach these critical audiences, and how The

Sallie Mae Fund is responding via new initiatives serving African American and Latino families. Results of both studies will be discussed

3:00 PM – 3:30 PM Break
Exhibitor Area
Ballroom I

3:30 PM - 4:30 PM Concurrent Sessions
Enabling vs. Empowering
Newburyport Room
Presenters: Dino Koff, Vermont Law School
Michelle Chamley, Vermont Law School

What services do financial aid administrators need to provide in terms of financial literacy? Do we empower students or are we hand holding? Learn how Vermont Law School is trying to empower students and educate them in terms of financial literacy.

Helicopter Parents and FA: Creating Effective Parent Orientations
Gloucester Room
Presenters: Kathy Anderson, MEFA
Christine Perry, Suffolk University

Do you have a parent orientation on your campus? Is financial aid a part of it? This session will show you some fun, creative ways to get important financial aid and billing information to parents during their child's campus orientation. Incorporating some of these ideas will help parents gain a better understanding of how financial aid works and what to expect with they receive the bill. Ultimately, your hard work may pay off by having more bills paid on time, more loans in place, and most importantly, fewer phone calls.

Is Your Office Invisible?
Boxford Room
Presenter: Gina Lucente-Cole, ASA

What is your reputation on campus? Are you interested in making more of an impact on campus and with your students? Hear about strategies to increase the breath of influence that the Financial Aid Office has on campus. Learn how to better communicate and work more effectively with various departments on your campus and in the community.

Keeping Your Sanity: To Be or Not to Be Compliant
Marblehead Room
Presenter: Allene Begley Curto, Springfield College

How does your institution maintain compliance for aggregate loan limits, annual loan limits and loan pro-ration, monitor the impact of consolidation on aggregate limits, and meet the requirement for review of NSLDS post-screenings? This session will cover

federal requirements and guidance and present some recommendations on how to monitor and document your compliance.

The ABCs of 529 plans

Ipswich Room

Presenters: Chris Sharpe, Fidelity Investments

Jonathan Shelon, Fidelity Investments

Financial aid administrators are well aware of the importance of saving for college, yet the inner workings of 529 plans can be daunting even for professionals. Learn 529-basics from a portfolio manager of Massachusetts' own 529 plan. Attendees will discover how Massachusetts' age-based portfolio program differs from other age-based portfolios. In addition they will receive information on 529 programs for their own children.

5:00 PM – 12:00 AM

Dinner

Dancing with Nik and the Nice Guys!

Ballrooms II – IV

Friday, November 4, 2005

7:00 AM 30 Minute Morning Walk with Leslie Mills (weather permitting)

Lobby

7:30 AM – 9:30 AM Breakfast

Ballrooms II – IV

8:00 AM – 10:30 AM Exhibitor Area Open

Ballroom I

9:30 AM - 10:30 AM Concurrent Sessions

Public Speaking

Boxford Room

Presenter: Steven Wynne, AMS

In every survey in the United States where adults are asked to list their ten worst fears, speaking in public is as number one. The fear of speaking in public is placed above fears of financial ruin and even death. And yet, more and more, we have to face this fear. In our information age, data is made available to us in a variety of formats and it is constantly updated and changed. We are expected to communicate these changes to one another - face to face - in our own office meetings and in departments across campus. This session will focus on identifying individual's strengths and opportunities for development as a successful public speaker, in both informal and formal settings, understanding what creates a successful talk - and speaking with confidence and identifying three steps to follow to create a successful talk.

The Intelligent Workplace

Newburyport Room

Presenters: Lana Jackman, Melange Information Services, Inc.

Lorna Jones, Melange Information Services, Inc.

The intelligent management of information resources is essential to increased workforce performance and productivity. Sustaining the competitive advantage in knowledge-based economies remains a major challenge. The systematic management of tacit and explicit knowledge is key, requiring constant refinement of learning processes that reflect a dynamic information society. Managers and workers alike need to understand how to effectively identify, utilize, and manage information and knowledge-based resources and assets. Particular attention will be given to the areas of information literacy and knowledge management in the context of the rapid and challenging pace of ICT development within the intelligent workplace

Government Relations - Reauthorization

Marblehead Room

Presenters: Kathy Osmond, Wellesley College

Eileen O'Leary, Stonehill College

Paul Combe, ASA

Bernie Pakala, Boston College

This session will update members on the status of the latest Reauthorization of the Higher Education Act, and how changes will impact students, financial aid office operations, and the lending industry.

How Much Is Too Much?

Marblehead Room

Presenters: Pamela Britton, CLC

Dr. Lana Low, Consultant

The economic downturn and failure of financial aid funding to keep pace with rising educational costs has resulted in the extraordinary increases in private loan and credit card borrowing and a critical need for financial literacy and responsibility. Many financial aid offices are now required to address access and retention issues and play an active role in enrollment management. This session provides research information on the challenges and opportunities for increasing participation rates in higher education; what we know about who shows up, stays and leaves college; what makes a difference; and the relationship between financial literacy programs and retention.

"Everyone Needs a Whack on the Side of the Head"

Ipswich Room

Presenter: Daniel Barkowitz, MIT

When you are faced with a problem at work, how do you find creative solutions? What approach do you use to generate new ideas when confronted with the same old issue? In this session, you will get a "whack on the side of the head" in an effort to generate creative thinking and new approaches. Using Roger van Oech's "Creative Whack Pack" as a jumping off point, we will examine your real life work dilemmas and come up with creative solutions. Be sure to bring an example of a thorny problem you are having at work, and together let's look at it creatively!

10:45 AM -12:00 PM Concurrent Sessions

Disaster Recovery: Planning for the Worst and Hoping for the Best Room?

Presenters: Deborah Glenn-Long, CSLF
Christine McGuire, Boston University

Recent hurricanes have caused unimaginable damage to homes, businesses and schools. The devastating effects of these storms have reminded us of the importance of creating and maintaining a disaster recovery plan. This session will outline what should be included in a comprehensive plan to ensure that your office can resume operations as soon as possible. It will also cover how schools and agencies can respond to the victims of a disaster. And remember, disaster can strike at any time in the form of fires, floods, terrorist attacks, earthquakes and, yes, even serial hurricanes. Are you ready?

To Know Me Is To Love Me: Take Your Personality to Work Room?

Presenters: Gina Lucente-Cole, ASA
Gretchen Bonfardine, ASA
Martie Adler, ASA

The differences between each of us can sometimes cause frustration, poor communication and difficulty coming to agreement. In this highly interactive session we will explore some of the key factors that cause these differences and the experience of appreciating and capitalizing on them in the workplace. You will leave this session with tools to identify the differences in your co-workers and create processes that utilize the differences which result in more effective operational methods.

12:00 PM Vendor Raffle