



2019 MASFAA Conference- Program Schedule

NOTE: All sessions and time subject to change. Updated 9.8.19

Wednesday, November 13th

- 1:00 PM - 2:00 PM Credential and Conference Registration, *Ballroom Foyer*
 2:00 PM - 5:00 PM Pre-Conference Workshops: NAFSAA Credentialing **[Sign Up Required]**
 Verification, *Location: TBD*
 Packaging, *Location: TBD*
 5:00 PM - 8:00 PM Conference Registration and Vendor Set-Up, *Ballroom Foyer*
 5:00 PM – 7:00 PM Pre- Conference Welcome Event, *Location: TBD*
 6:00 PM – 8:00 PM Pre-Conference Group Dinners **[Sign-Up Required]**

Thursday, November 14th

- 7:00 AM - 1:00 PM Conference Registration, *Ballroom Foyer*
 7:30 AM - 9:00 AM **Vendor Hours**, *Ballroom Foyer*
 8:00 AM - 9:00 AM Breakfast, *Ballroom*
 9:00 AM - 10:15 AM Conference Welcome & Opening Keynote from Maura Thomas, *Ballroom*

Session Block 1: 10:25 AM - 11:25

Presenter Name and Organization	Session Title	Session Description
Julie Lawton, <i>Cognition</i> Financial/ SunTrust Kathleen Roebuck, <i>FATV</i>	The FISH! Philosophy	Based on the real life success of the World Famous Pike Place Fish Market in Seattle, Washington, we will learn how to be fun, friendly, attentive and enthusiastic at work. This session will help improve customer service, teamwork, employee engagement, recognition, retention and leadership. The FISH! Philosophy empowers employees to be more effective in all aspects of customer service and life!
Linda Price, <i>Minding Your Mind</i>	Mindfulness and Stress Reduction in the Workplace	This interactive and engaging presentation is designed to empower participants to be present and manage stress during the workday. Learn about the science behind what makes mindfulness practices so effective, practice techniques that can be used ongoing, and leave with resources and guidance for reducing stress while supporting others.
Marie Johnson, <i>UVM</i>	Building and Strengthening Campus Partnerships	Supporting student success in higher education requires collaboration and coordination from many offices on campus. Too often, given the pace of our work and resource strains, we can become isolated and frustrated which isn't fun and impacts our ability to serve our students. This session will share strategies for engaging campus partners in collaboration to address issues, and more importantly, to be consulted early on when changes to programs or new programs are being developed. Hear about shared initiatives and strategies for demystifying our work and proactively engaging campus partners.



Maura Thomas	Conversation with the Keynote	Continue the conversation with Maura Thomas, our opening keynote speaker!
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11:25 AM - 11:45 AM Break with Snacks, *Ballroom Foyer*

11:25 AM - 11:45 AM **Vendor Hours**, *Ballroom Foyer & Breakout Session Foyer*

Session Block 2, 11:45 AM - 12:45 PM

Presenter Name and Organization	Session Title	Session Description
Stacey MacPhetres, <i>Bright Horizons, College Coach</i>	Building Financial Independence: Money Skills for Young Adults	Helping young adults gain control over their own finances is important. Learn how young adults can develop the skills needed to earn, spend, save, borrow and protect money that aligns with their life goals.
Dawn Batchelor and Stephanie King, <i>Bay Path University</i>	Navigating Difficult Conversations	Delivering unpleasant news, discussing a delicate subject, or talking about something that needs to change can be challenging. Planning and preparing can help these conversations go smoothly and be successful.
Jennifer Trauman, <i>College Ave Student Loans</i>	The Care and Feeding of Your Career	Who is responsible for your career? Where do you begin to assess what you want and need? What should you do now? Is it time to make a move? How do you go about moving on? Do you need to network? Join us in this informative session to take stock of your career and make a plan to take it to the next level.
Sarah Bergeron, <i>Worcester Polytechnic Institute</i>	What you should know about game based financial literacy learning	Have you ever looked for ways to get students actively engaged in learning about financial literacy? Do you want to reach more students with the information you have but aren't sure how to do that? Then look no further! This session will explore the benefits of using games to teach financial literacy concepts and behaviors, as well as some creative applications for games. Attendees will be able to play several different games themselves and will take lots of great information back to their own programs.

12:45 PM - 2:45 PM **Vendor Hours**, *Ballroom Foyer*

1:00 PM- 2:45 PM Lunch, *Ballroom*
 Junior Achievement, 2019 Charity
 EASFAA Update, Marie Johnson, EASFAA President
 Federal Update, Betsy Mayotte, TISLA



Session Block 3, 2:55 PM - 3:55 PM

Presenter Name and Organization	Session Title	Session Description
Lisa Talbot and Maureen Fagan, <i>Sallie Mae</i>	Igniting Your Campus Brand to Build Relationships with Students, Families and Alumni	This session will focus on defining your campus brand by engaging and empowering your employees by using social media and influencers to tell your story. This session will also include ways to promote your brand through alumni engagement to lifelong relationships.
Abbey Guerino, <i>Bottom Line</i>	Aid through the Ages: Considering Student Experience as Applicants, Enrolled Students, and Alumni	During the 2016-2017 academic year, 85% of first-time, full-time degree-seeking undergraduate students received financial aid. In this session, Bottom Line will discuss the experience of first-generation students from low-income backgrounds who are part of this growing group. We will explore the different perceptions that first-year applicants, enrolled students, and graduates hold about the financial aid process while examining the ways in which these varying perceptions may impact best practices for financial aid professionals. In addition, we will consider strategies that can be employed in work with students surrounding positive engagement from pre-orientation through graduation.
Robert Weinerman, <i>Iron Bridge</i>	Introduction to the 2018 Tax Return	The IRS introduced a radically redesigned Form 1040 and six new numbered schedules in 2018 – and financial aid may never be the same. In this session, participants will learn about the changes implemented in the tax forms in 2018 – including where to find all the figures required on the FAFSA, on and off-form calculations that have been introduced, the Schedule 1 based requirements for the Simplified Formula and Automatic Zero EFC, and the forms you just don't need to worry about. We'll also take a quick look at the changes to the 2018 Tax Return Transcript, for those schools that will continue to collect them.
Clantha McCurdy, <i>OSFA</i>	Updates from OSFA!	TBD



Session Block 4, 4:05 PM – 5:05 PM

Presenter Name and Organization	Session Title	Session Description
Amy Staffier, <i>Simmons University</i>	Professional Judgement – Authority, Implementation & Documentation	As financial aid professionals, we are allowed to make adjustments, on a case-by-case basis, to the cost of attendance or the values of the data items required to calculate the EFC. In this session we will discuss the authority we have and, through case studies, the various ways to use professional judgement to best help the students and families we work with.
Ramon Soto, <i>uAspire</i>	Financial Aid through the Equity Lens	With the recent adoption of the Equity Vision Statement by the Board of Higher Education, Massachusetts is in the early planning stages of measuring postsecondary success through an equity lens. This major shift in policy will catalyze and sustain efforts to improve the postsecondary outcomes of students who require the most support. A student-serving nonprofit will provide participants with key insights on the equity lens from a financial aid perspective. This workshop will highlight the need for transparent aid offers, the importance of calculating the true cost of college beyond tuition and fees, and provide examples of current and proposed legislation, as well as campus-based programs, that support this initiative. Join us to share your expertise and inform solutions to support underrepresented and under-served students' ability to access and complete their postsecondary education.
Rich Neilsen, <i>New Hampshire Higher Education Loan Corporation</i>	Is Your Office Color-Blind?	Do you know your personality color? Do your peers? Understanding the perception and interpretation of different personalities can help to bring professional congruence within your department. In this session we'll identify your color, highlight your traits and discuss how understanding the various interpretations of those traits can bring strength and understanding to your office team.
Jeff Bentley and Donna Shelby, <i>Citizens Bank</i>	Using an RFI to Create a Preferred Lender List	Institutions can play a critical role in simplifying the process for their students and their families through a preferred lender list. Additionally, a preferred lender list can be an effective tool to help financial aid administrators in informing borrower choice. In this session you will learn best practices on how different schools leverage an RFI to create a preferred lender list.

5:15 PM - 6:15 PM **Vendor Hours & Cocktail Reception, *Breakout Session Foyer (2nd Floor)***
 6:15 PM - 7:30 PM **President's Reception and Awards, *Ballroom***
 7:30- PM- ? **Dinner/Entertainment on your own**



Friday, November 15th

8:00 AM - 10:00 AM Conference Registration, *Ballroom Foyer (3rd Floor)*

8:00 AM - 8:50 AM Breakfast & MASFAA Business Meeting, *Ballroom*

8:00 AM - 9:00 AM **Vendor Hours**, *Ballroom Foyer*

Session Block 5, 9:00 AM to 10:00 AM

Presenter Name and Organization	Session Title	Session Description
Amy Staffier, <i>Simmons University</i>	Keys to Effective Communication	Effective communication is important in customer service, problem solving, conflict resolution, and for positive working and personal relationships. By using conscious communication and words that work we can help ease interactions and effectively communicate through even the most challenging conversations.
Thomas Dalton, <i>Edfinancial Services</i>	'Nudging' and Retaining an Untapped Enrollment Demographic Pool	Changing student demographics and economic challenges have challenged many colleges to adapt in order to survive and thrive. During this round table discussion with State University of New York (SUNY) Leaders, learn how SUNY is reengaging and retaining college stop-outs by 'intrusively nudging' this seldom tapped enrollment demographic pool. This session will outline an easily adaptable, cost efficient email communication program that was developed by SUNY and deployed statewide via strategic partnership. Case study data from recent academic terms will demonstrate how SUNY has been able to enhance tuition recovery rates by improving college enrollment and student completion rates at their four-year, community college and technical college campuses. Best practices for campus replication will also be shared with session attendees.
Patrick Ziegler, <i>Wells Fargo</i>	Student Loan Crisis? A Closer Look at Recent Research and Demographic Trends	Are we really approaching a student loan crisis? How many borrowers are truly in distress? Are student loans a drag on the national economy? This session will look at recent data and demographic trends with particular attention paid to high-balance graduate borrowers to try to provide more context to these pressing questions. The research shared will hopefully encourage discussion among attendees who will have an opportunity to share their experiences counseling borrowers.
Kathleen Roebuck, <i>Ocelot</i>	Engaging Students via Chatbot: 24/7 Technology for a 24/7 world	Looking for innovative, leading edge ways to engage with your students? Come learn how Artificial Intelligence (AI) is helping campuses answer student questions. In a 24/7/365 world, students expect consistent answers all day every day through their phones, tablets, laptops and other media.



		<p>This session will explore utilizing technology to assist in engaging with your students. It will include panel that will share their experiences & successes when it comes to engaging students.</p> <p>Panel includes: Stephanie King, Bay Path University Carla Minchello, Framingham State University Allene Curto, Springfield College</p>
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Session Block 6, 10:10 AM to 11:10 AM

Unconference (Sessions and Presenters TBD)

11:10 AM - 11:30 AM **Vendor Hours, Ballroom Foyer**
11:10 AM - 11:30 AM Break with Snacks, *Ballroom Foyer*

Session Block 7, 11:30 AM to 12:30 PM

Presenter Name and Organization	Session Title	Session Description
Julie Moreno Rehder, <i>CommonBond</i>	Understanding Student Loan Refinancing – A Primer on This Emerging Trend	Are you concerned about rapidly increasing student debt levels? Are you looking for solutions to present to your students that can assist them with managing their federal and private student loan debt as well as possibly reducing their total repayment costs and thereby reducing default rates? If these are issues you and your students face, refinancing can help! This session will explore the growing student loan refinancing trend by providing a primer on how student loan refinancing works. In addition, we will dispel the myths surrounding these products and provide you with counseling tools which you can use to advise your graduates and families so they can determine if refinancing is right for them."
Lenny Atkins, <i>Sixup Lending</i>	Low-income students success depends on more than just financial aid	For many high achieving, low income students, money is often the single largest barrier to entering college or finishing a degree. And while federal financial aid is available, often times it is not enough to help a student attend a four year school full time, and continuously, to graduate on time.
Michelle Jarvis-Lettman, <i>Wesleyan University</i>	Getting to the Heart of the Matter: Effective Communication with a Personal Touch in an Increasingly Impersonal World	Technology is wonderful; as financial aid professionals, our jobs rely on technology. It makes for faster processes, greater capabilities, and in theory, better customer service, BUT good customer service does not always happen, because it cannot without good communication and a personal touch. It is now very easy to hide behind a computer, but as the financial aid process becomes increasingly complicated and the price of a degree increasingly expensive, we need to make sure we remain approachable and remember we are people dealing with other people. We must find effective ways to communicate the financial aid process to students and their families while embracing technology.
Robert Weinerman, <i>Ironbridge</i>	Assets in the Needs Analysis	Have you read the Application and Verification Guide's description of the value of a trust? Do you understand it? Do you know when a 529



		<p>plan should be reported on the FAFSA, and when it should be left off? What about the value of rental property that is worth less than its mortgage? In this session, participants will get a refresher on the asset reporting rules, with an emphasis on those that are most confusing to aid officers, and hints about how to identify and resolve conflicting information related to the asset side of the need analysis.</p>
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Session Block 8, 12:40 PM to 1:40 PM

Presenter Name and Organization	Session Title	Session Description
Jonathan Hughes, <i>MEFA</i>	Early College Savings: Why Colleges Should Care if their Students and Families Are Saving Early	This session will highlight data surrounding early college savings and review various college savings programs, with a particular focus on initiatives throughout the Commonwealth. Attendees will walk away more knowledgeable on the various programs and why, as an institution, they should be supporting these programs.
Amy Gerber, <i>Ascendium Education Solutions (formerly Great Lakes Guaranty)</i>	Student Debt Letters - One in Default is Too Many: Using Debt Letters to Empower Student Success	Are you concerned about your students' borrowing trends? Do your students review their debt annually before making borrowing decisions for their next award year? With student loan debt levels on the rise and projections that 40% of borrowers will default by 2023 you will want to attend this session to learn some recommendations for default prevention best practices. During this session we will touch on student debt letters, financial wellness considerations and various types of borrower outreach to consider.
Heather Mores, <i>Northern Essex Community College</i>	Institutional Compliance: It's A Team Sport. Navigating the intricacies and intersections of regulatory compliance in higher education.	This session focuses on federal regulations that span the scope of the whole institution, and not just financial aid. Most, if not all, of the regulations we will explore directly affect an institution's ability to receive federal funding. This includes federal grants and financial aid. These regulations are not the sole responsibility of a single office or department. They are the responsibility of Public Safety, Student Life, Human Resources, and many more.
Monica Blondin, <i>Assumption College</i>	What is Your Relationship with Money?	Do you avoid opening your credit card statement when it arrives in the mail? Do you feel guilty after you purchase something for yourself? Do you feel having more money would solve all your problems? No matter who you are and what you do in life, you have a relationship with money. Many of us counsel students, parents, and clients about money, but do you know your own habits and relationship when it comes to managing it? Whether you use cash, credit, or debit, all of us use money in some way or form on a daily basis. However, talking about money is



		still considered a taboo topic in our culture. Come learn about your own relationship with money in a judgement free environment!!!
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1:30 PM **Vendor Breakdown**

1:45 PM - 3:00 PM Lunch, *Ballroom*
Closing Address, Commissioner Santiago
Charity Raffle

3:00 PM Conference End