



2023 ISFAA Conference

Program Guide

March 8-10, 2023

Carmel, IN



Wednesday

12:00 pm – 4:00 pm Registration Open

12:00 pm – 6:15pm Exhibits Open *Capital Ballroom*

12:00 pm Silent Auction opens *Capital Ballroom*

Bidding will take place over the next 2 days and end on Thursday at 5:30 pm.

1:00 pm – 2:15 pm Welcome

FAFSA Simplification Implementation

Carmel Ballroom

Presenter: Alex DeLonis, Director of Financial Aid, Wabash College

Moderator: Chester Priest, KHEAA

Join us as we begin the conference with an update on FAFSA simplification. This session will go over the latest news on the changes to both 2023-2024 & 2024-2025. We will see how one school used NASFAA's SAID modeling tool to advise campus leadership, take a look at the impact of FAFSA Simplification on Policies and Procedures, and go over frequently asked questions and concerns.

2:15 pm – 2:30 pm Break

2:30 pm – 3:30 pm NASFAA Update

Carmel Ballroom

Presenter: Helen Faith, Director of Student Financial Aid, University of Wisconsin – Madison

Moderator: Bill Wozniak, InvestEd Indiana

The NASFAA Update will provide an update on association activities, professional development and training opportunities, and the volunteer and public policy work of the Association. We'll also go over the many tools and resources available through NASFAA to support your daily work and share overall trends in student aid, including recent legislative and regulatory activity. Movement within the Department of Education concerning negotiated rulemaking and updates from Federal Student Aid (FSA) will also be discussed. Learn how your membership benefits you and your institution and how you can get involved.

3:30 pm – 4:00 pm Break

4:00 pm – 5:00 pm Breakout Sessions (*choose one of the following three sessions*)

New Member Session (and Training Materials)

Crooked Stick

Presenters: Alex DeLonis, Director of Financial Aid, Wabash College

Sarah Owen, Financial Aid Systems Specialist, Ivy Tech Community College

Stan Werne, Director of Financial Aid, Vincennes University

Heather Lisco, Director of Financial Aid, Caris College

Moderator: Jeff Pierpont, College Rapture

New to ISFAA or new to the state of Indiana? Is this your first ISFAA conference? Join several ISFAA leaders to discuss what ISFAA has to offer, and how to maximize your membership after you leave the conference. We will discuss how to get everything out of the ISFAA conference, membership benefits, and how to get involved. We will also review some popular training materials to make you a successful aid administrator.

DACA students and funding options

Carmel Ballroom

Presenter: Angela Adams, Attorney, Adams Immigration Law, LLC

Moderator: Kim Jeffers, PNC

Immigration law often seems like a confusing and complex game and oftentimes there are no winners. This session will uncover the challenges faced by both DACA and undocumented students, including barriers to financial aid. We will discuss the future of the DACA program and other obstacles presented by our current immigration system.

State of Student Finances: Multiyear Comparisons and Pandemic Shift

Eagle Creek

Presenter: Matt Nettleton, Assistant Vice President, Inceptia

Moderator: Matt Nettleton, Inceptia

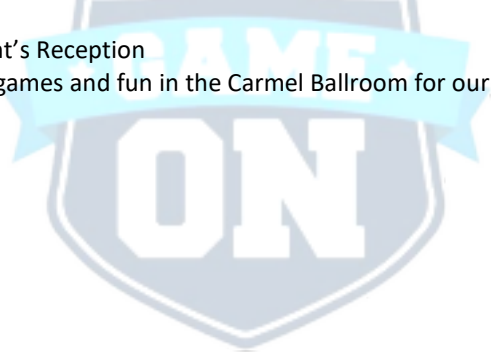
In 2018, Inceptia published our first “State of Student Finances” report, examining the real-world financial choices of college students across the country. Three years later, we revisit our survey with some surprising results, including the immediate impact of COVID-19 on student money management. Join us as we reveal the data from our second “State of Student Finances” publication, in which we surveyed over 65,000 students to gauge how financial behaviors change – or don’t – over time. The results also give us unique insight into how students are navigating the pandemic and adapting their behaviors in the face of economic uncertainty. This review can help higher education professionals identify those aspects of personal finance with which students struggle, while also offering financial education strategies to assist and empower students.

5:00 pm – 7:00 pm

President’s Reception

Carmel Ballroom

Join us for food, games and fun in the Carmel Ballroom for our President’s reception.



Thursday

8:00 am – 11:00 am Registration Open

8:00 am – 5:30 pm Exhibits Open *Capital Ballroom*

9:00 am – 10:30 am Keynote Address *Carmel Ballroom*

Cultivating Young Minds through Unconventional Learning Opportunities

Presenter: Charity Hurst, Youth Empowered Indy

Moderator: Kevin McNamara, Earnest

Charity Hurst will share about Youth Empowered's transformational Explore journeys that engage youth in studying sciences and humanities in the great outdoors. She will discuss how participating with nature positively impacts student engagement as well as learning outcomes. In addition, she will examine the potentiality of positive physical and mental health benefits of learning external to the classroom.

10:30 am – 11:00 am Break

11:00 am – 12:00 pm Breakout Sessions (*choose one of the following three sessions*)

Reach the Goal with Big IDEAS

Crooked Stick

Presenter: Kimberly Stewart-Brinston, Senior Associate Director of Admissions for Diversity Recruitment and Outreach, Indiana University - Bloomington

Moderator: Matt Nettleton, Inceptia

This session will provide participants with information and tools to help move their practice forward with the effective use of:

- Inclusion
- Diversity
- Equity
- Access
- Success

Session participants will walk away with a better understanding of each of these terms in the context of financial aid. They will also receive a tool to help them strategize how each principle can be maximized to create positive institution and student outcomes.

Being Attentive to Compliance without Brandishing the FSA Handbook as a Weapon

Carmel Ballroom

Presenter: Helen Faith, Director of Student Financial Aid, University of Wisconsin – Madison

Moderator: Tracy Drechsler, SoFi

Do you find that the aid office is often the last to know about campus developments that have major impacts on us? Do you feel like the wet blanket at every academic innovation brainstorming shindig? Does your office struggle to get the resources needed to be successful? Hmmm, ever wonder why? Let's be honest – we've probably all been guilty of brandishing the FSA Handbook like a weapon, or going straight to "no" without passing start. Join this session to talk through these and other challenges we've experienced and discuss approaches to support greater success for our offices and ultimately the students we serve.

De-Escalation: Recognizing Anxiety and How to Assist the Student

Eagle Creek

Presenter: James Richter, Eskenazi – Mental Health

Moderator: Deb Gossman, College Ave

Anxiety and stress drive human life. We all share those experiences. However, there are times when anxiety and stress overwhelm us to where we do not think or act clearly. This presentation focuses on identifying early anxious behaviors that could indicate potential escalation of erratic or potentially threatening behavior. We will also discuss how critically important it is for each of us to manage our own anxiety and will examine how our unchecked anxiety can actually escalate student behavior, rather than de-escalate it.

12:00 pm – 1:15 pm Lunch

1:15 pm – 2:30 pm Strategic Plan/MASFAA Update

Carmel Ballroom

Presenters: Lisa Bridgewater, Associate Director of Student Financial Services, IUPUI and ISFAA President

Megan Watson, Associate Director of Student Financial Services, IUPUI and ISFAA President-Elect

Caleb Keith, Director Institutional Improvement, IUPUI

Stephen Hundley, Senior Advisor to the Chancellor for Planning and Institutional Improvement, IUPUI

Craig Slaughter, Associate Vice President for Enrollment, Kenyon College

Moderator: Jane Lemke, Discover

Following a year-long collaborative, stakeholder-driven planning process, ISFAA is launching its new strategic plan. This framework will provide ISFAA and its members the roadmap for a dynamic and successful future. In this session, learn about how the plan was developed, key elements of the plan, and opportunities to become involved in implementing and supporting the strategic plan.

2:30 pm – 3:00 pm Break

3:00 pm – 4:00 pm Breakout Sessions (*choose one of the following three sessions*)

Leadership vs Management

Crooked Stick

Presenter: Heidi Carl, Executive Director, Division of Financial Aid – Purdue University

Moderator: Steve Queisser, Student Connections

Think you're a natural born leader? Want to learn more about how to be a good leader? This session will teach you characteristics and practices to be a good leader and have exemplary leadership. Discuss with your peers how being a leader doesn't always mean that you have to be the boss. There is a big difference between leadership and management and everyone on the team can shine as a leader. Will you accept the Challenge to be a leader for your team and for ISFAA?

Connecting with Students

Carmel Ballroom

Presenter: Matt Falduto, Senior Director of Financial Aid, Kirkwood Community College

Moderator: Raina Chezem, ELM

This presentation will go into a holistic approach to financial aid advising, going deeper than just the answers to the student's financial aid questions. Using the presenter's institution as an example, this session will discuss how to use data to get an understanding of your students' perspective. The session will then look at how to connect with the students based on that perspective.

Budgeting Basics

Eagle Creek

Presenter: Deb Gossman, Head of Campus Development – Central States, College Ave Student Loans

Moderator: Deb Gossman, College Ave

You will learn the basics of budgeting and why having a budget is important for today and for the future. In many cases, it is difficult to start the budgeting process and we will show you how to begin as well as how to stick to a plan. You will learn of budgeting technology that can assist you while also learning best practices in helping you manage your expenses, pay off current debt and determining your needs vs. your wants. Many other helpful tips and resources!

4:00 pm – 4:15 pm Break

4:15 pm – 5:15 pm Breakout Sessions (*choose one of the following three sessions*)

411 on Emergency Grants

Crooked Stick

Presenters: Amber Phillips, Assistant Director, Office of Student Financial Services, IUPUI

Amanda Fishman, Financial Aid Liaison, IU – Robert H. McKinney School of Law

Moderator: Donette Cassman, SallieMae

Amber and Amanda discuss IUPUI's Application for Emergency Funding and the challenges IUPUI had in building the emergency grant process to help assist students in their time of need. After an overview of IUPUI and IU McKinney's application process, including review and notification; they will discuss the sources that they use to award emergency grants, explore how they determine eligibility, and making the grant fit within a student's cost of attendance.

Diversity – Implicit Bias

Carmel Ballroom

Presenter: Craig Slaughter, Associate Vice President for Enrollment, Kenyon College

Moderator: Michael Jones, Citizens

Implicit bias refers to the unconscious thoughts, feelings, and attitudes that influence our perceptions and actions. This session will focus on the ways in which implicit bias influences the experience of students and coworkers. Strategies for recognizing implicit bias and reducing its impact will be discussed.

Financial Education and Issues of Student Inequity

Eagle Creek

Presenter: Matt Nettleton, Assistant Vice President, Inceptia

Moderator: Matt Nettleton, Inceptia

As financial education advances, we can see that not all financial conversations are created equal. Our students can face issues of social injustice or inequity, which may inhibit their ability to fully engage with our efforts. This intersectionality of finance and inequality makes it incumbent upon us to address these barriers to move the discussion forward. Attendees will learn about issues regarding the gender pay gap, the racial wealth divide, and food insecurity and homelessness by reviewing:

- An overview of leading data and research
- Identification of issues of inequity pertaining to race, gender, and socioeconomic status
- Ideas and implementation strategies for incorporating these topics into financial education programs

5:30 pm Close of Silent Auction

Dinner on your own - we encourage you to find some colleagues and explore one of the great options nearby.

Friday – School Spirit Day!

8:00 am – 10:30 am Exhibits Open

Capital Ballroom

9:00 am – 10:00 am Breakout Sessions (*choose one of the following three sessions*)

Funding Training, Audit findings vs. Training Cost

Crooked Stick

Presenter: Gina Pirtle, Director of Financial Aid & Scholarships, IU Northwest

Moderator: Kirsten Phillips, Higher Education Financial Wellness Alliance

Travel and training budgets are often first in line for cuts when institutions feel a financial strain. Financial aid professionals must become well versed in advocating for the importance of professional development funding in our particular field. We will identify important tools and information to use when we discuss professional development budgetary constraints with campus leadership.

Hot Topics in Financial Aid

Carmel Ballroom

Presenters: Alex DeLonis, Director of Financial Aid, Wabash College

Helen Faith, Director of Student Financial Aid, University of Wisconsin - Madison

Matt Falduto, Senior Director of Financial Aid, Kirkwood Community College

Lauren Greider, Executive Director of Student Financial Services, IUPUI

Melissa Smurdon, Executive Director of Financial Aid, Butler University

Moderator: Robert Sommers, INvestEd

GAO aid offer report, the ending of the national emergency, and FAFSA Simplification on the horizon – Oh My! It seems we are frequently reading about a new financial aid rule coming or going. Recently, there was a report scrutinizing ongoing financial aid practices. Ever wonder how other schools are addressing the ever-changing world of financial aid? Panelists will participate in a guided discussion about how these things impact their school's practice and planning. Attend this panel discussion of the latest hot topics in financial aid.

Care and Feeding of Your Career-Post Covid

Eagle Creek

Presenter: Deb Gossman, Head of Campus Development – Central States, College Ave Student Loans

Moderator: Deb Gossman, College Ave

How often do you take stock of your current position and long-term career path? Who is responsible for your career? What should you do now? Is it time to make a move? Do you need to network? Join us for this informative session to learn how to stock of your career and make a plan to take it to the next level.

10:00 am – 10:30 am Break

10:30 am – 11:15 am ISFAA Business Meeting/Awards

Carmel Ballroom

Presenter: Lisa Bridgewater, Associate Director of Student Financial Services, IUPUI and ISFAA President

11:15 am- 1pm Lunch/CHE Update

Carmel Ballroom

Presenter: Josh Garrison, Associate Commissioner, Indiana Commission for Higher Education

Moderator: Christopher Pine, Ball State University

Commission staff will provide an update on the 2022 Legislative Session and the impact on higher education.