

2022 ISFAA Conference

Program Guide

February 2-4, 2022

Plainfield, IN



**Wednesday, February 2**

12:00 pm – 4:00 pm Registration

12:00 pm – 4:00 pm Exhibits Open

12:00 pm Silent Auction opens

Bidding will take place over the next 2 days and end on Thursday at 6:00 pm.

1:00 pm – 2:15 pm NASFAA Update : Inside the Beltway *Hendricks A via Zoom*

Presenter: Justin Draeger and Rachel Gentry

Moderator: Donette Cassman

This NASFAA Federal Update will provide an overview of the latest happenings in Washington, including a high-level landscape of the current political climate in D.C. with a focus on federal financial aid policy and how it has impacted students and institutions in recent years. Overall trends in student aid will be discussed including recent legislative and regulatory activity, reauthorization proposals and predictions for how student aid funding will fare in future budget negotiations. Movement within the Department of Education concerning negotiated rulemaking and updates from Federal Student Aid (FSA) will also be discussed. The session will also provide an overview of NASFAA-led projects, services, and advocacy efforts. Lastly, while the COVID-19 pandemic is still in effect, updates related to funding or relief measures will also be covered.

2:15 pm – 2:45 pm Break

2:45 pm – 3:45 pm Breakout Sessions *(choose one of the following three sessions)*

Diversity Session: Result of survey and panel *Hendricks C*

Panelists: Danielle Hayden and Alex DeLonis

Moderator: Kim Jeffers

During 2020, the Access, Equity, and Diversity Committee surveyed the ISFAA membership to gather demographic information and details about the ISFAA environment. This session will expand upon those results and share steps the committee has taken/will take to increase access, equity, and diversity among ISFAA members. With the intention to be interactive, this session will provide the opportunity to share feedback, suggestions for improvement, or address any concerns.

Weird Science: Understanding How your Mind and *Hendricks D*

Emotions Affect Your Money Presenter: Matt Nettleton

Moderator: Deb Gossman

If you are ready to get serious about taking charge of your finances, you need to start by understanding the link between your mind, your emotions, and your wallet. This enlightening session will help you identify your unique Money Personality and both the pros and cons of how you handle your money. We’ll even leave you with tips to retrain your brain so that you can begin to make intentional spending choices, rather than being ruled by emotions.

Q & A: ScholarTrack and State Aid *Hendricks E*

Presenter: Angel McAllister

Moderator: Melinda Middleton

Come and learn about Indiana State financial aid and the ScholarTrack system. Angel McAllister will lead a lively discussion on using ScholarTrack and answer any questions about State financial aid as well as recent changes.

3:45 pm – 4:00 pm Break

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

Adds, Drops and Withdrawals *Hendricks C via Zoom*

Presenter: Effie Barnett

Moderator: Donette Cassman

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). Case  
scenarios involving recalculation rules and census dates in various situations as students add  
and drop courses will be discussed. This session will also provide an in-depth explanation of  
student withdrawals on topics such as school attendance, official and unofficial withdrawals, and determining the date of withdrawal.

Staying motivated in a post COVID world *Hendricks D via Zoom*

Presenter: Justin Draeger

Moderator: Andy Weaver

Financial aid administration is hard, even in normal times. But every few years, what is normally a tough job becomes nearly impossible, with a pandemic and a recession that's testing the mental and emotional health of our students and each one of us. This is one of those years that makes even the most dedicated aid professional ask: "Why am I doing this?" Join NASFAA President Justin Draeger as he shares his personal tips on how best to find motivation in tough times.

The Student Loan Repayment Checklist *Hendricks E*

Presenter: Carol Swenson

Moderator: Amanda Fishman

Many borrowers leave school without a plan for repaying their student loan debt. With everything going on at the end of their college careers, it’s not unusual for important student loan information to be missed during online exit counseling. You can help prepare your borrowers by providing them with a student loan repayment checklist. During this session, we’ll share those essential items that can make the transition to repayment a successful one.

5:00 pm – 6:15 pm President’s Reception *Vending Area*

5:00 pm – 6:15 pm Exhibits Open

**Thursday , February 3**

8:00 am – 10:15 am Exhibits Open

9:00 am – 10:30 am Honing Your Emotional Intelligence (EQ) *Hendricks A* Presenter: Deb Dunbar

Moderator: Lisa Bridgewater

Isn’t it interesting how some people have the seemingly natural talent for handling themselves and/or others with ease? It is an amazing feat considering our high stress, multi-tasking, spread-too-thin world today. Most likely, these individuals have mastered the principles found within Emotional Intelligence. The essence of Emotional Intelligence is our ability to identify and manage our own emotions and our ability to identify emotions in others and manage interpersonal relationships.

We will learn:

* why emotional intelligence is an essential competency in today’s work-world
* how to fully engage the four fundamental areas of EQ:
  + self-awareness, self-management, social awareness, and relationship management
* what key skills compromise emotional intelligence success

10:30 am – 11:00 am Break

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

Awarding Title IV Aid for Summer, Intersessions and Modules *Hendricks C via Zoom*

Presenter: Effie Barnett

Moderator: Kevin McNamara

This presentation goes beyond our session on the Basics of Determining Academic Calendars to describe the awarding of Title IV aid for summer terms and intersessions. In addition, we will also explore the concept of awarding Federal Pell Grant and Federal Direct Loans in modules. Clinical work will also be discussed

Managing the Challenges of Recruitment and Retention *Hendricks D*

in Today's Workplace Presenter: Tom McMahon and Brenda Coulson

Moderator: Tracy Dreschler

Today’s war for talent is as difficult as it has been in decades.  Between the pandemic and the “Great Resignation”, employers are left competing for an ever shrinking pool of qualified candidates.  Join us and learn about the latest trends in recruiting and what you can do to improve your odds of capturing and retaining the best talent available on the market.

Governmental Relations *Hendricks E*

Presenter: Maralee Clayton and Sarah Soper

Moderator: David Bowman

Members of the Governmental Relations Committee will provide insight into some of the work they do on behalf of ISFAA, students, and families as well as answer any questions or concerns we might have.

12:00 pm – 12:45 pm Lunch *Hendricks B*

12:45 pm – 1:30 pm Business Meeting/MASFAA Update *Hendricks B*

Presenter: Heidi Carl

Moderator: Candice Sutliff

1:30 pm – 1:45 pm Break

1:30 pm – 4: 30 pm Exhibits Open

1:45 pm – 2: 45 pm Breakout Sessions *(choose one of the following three sessions)*

R2T4 Essentials *Hendricks C via Zoom*

Presenter: Effie Barnett

Moderator: Lisa Albers

Whether you are new to R2T4 or have performed calculations for years, if you are interested in  
the R2T4 process, this session is for you. This presentation will discuss key definitions, provide  
a high-level overview of the actual R2T4 steps, and address important concepts and time  
frames that take place throughout the R2T4 calculation. Topics to be covered include  
withdrawal dates, dates of determination, post-withdrawal disbursements, and grant  
overpayments. This session will also address some of the most popular R2T4 topics, including  
institutional charges, aid that could have been disbursed, and more!

Recertification PPA *Hendricks D*

Panel: Darla Hooper and Melinda Middleton

Moderator: Heather Lisco

Do you wonder what goes into being recertified by the U.S. Department of Education as a school eligible to provide Title IV aid? What is a PPA? Members of the panel will explain some of the challenges and rewards of undertaking the recertification process.

Implementation of a One Stop Shop *Hendricks E via Teams*

Presenters: Mike Szakaly and Megan Walton

Moderator: Gina Pirtle

In this session you will learn the steps to take to implement a “One-stop shop” for your students. Information will be provided on “lessons learned” and what you may need to consider when implementing a one-stop-shop. You will also learn about what other departments you will need to coordinate with, communicating your progress with your administration and challenges you could potentially incur.  In addition, there will be a discussion of any outreach the one stop shop makes to students. Come join us for this informative session!

2:45 pm – 3:00 pm Break

3:00 pm – 4:00 pm Planning for the Future: Opportunities for Individuals, *Hendricks A* Institutions, and ISFAA Presenters: Stephen Hundley and Caleb Keith

Moderator: Lisa Bridgewater

This interactive session engages participants in planning for the future—as individuals, within institutions, and for ISFAA. Learn the latest themes and trends affecting higher education, including issues concerning strategic enrollment management, student learning and success, college access and affordability, and responding to expectations from a multitude of stakeholders. Engagement in individual reflection and institutional priority setting will accompany opportunities for input concerning the future of ISFAA as it commences a dynamic strategic planning process. Learn important issues and ideas for personal and professional growth, while also helping to shape ISFAA’s future. Content from this session is drawn from engagements to which the presenters provide leadership: the Assessment Institute in Indianapolis, the oldest and largest U.S. higher education event focused on assessment and improvement; the *Assessment Update* periodical; the *Trends in Assessment* book series; and the *Leading Improvements in Higher Education* podcast.

4:00 pm – 4:30 pm Break

4:30 pm – 5:30 pm Breakout Sessions *(choose one of the following three sessions)*

Mistakes You're Making with Your Policies and Procedures *Hendricks C via Zoom*

Presenter: Mandy Sponholtz

Moderator: Brandon Kuntz

Let's be real: no one's policies and procedures are perfect. But you might have some key mistakes in your policies and procedures and not even realize it. These errors can mean big problems for your students and staff, especially if discovered during an audit or federal program review. Learn about these key mistakes and discuss ways to fix them quickly

VA Bird of a Feather *Hendricks D*

Presenter: Jayson Jarrett

Moderator: Candice Sutliff

The past year has brought a number of big changes to many of the military-connected aid programs our schools work with each day. While these changes have been a challenge for all of us to implement, we know that our Indiana Veteran’s service staff members have answered the call and have come up with excellent ways of working through these changes. Join us in discussing these challenges and the solutions that our colleagues have come up with to better serve their students. This session will be an open forum format, with Jayson Jarrett (Ball State University) facilitating the discussion.

Building and Managing Credit *Hendricks E*

Presenter: Deb Gossman

Moderator: Deb Gossman

We understand that establishing good credit is vital to financial health. Our students often begin to build credit in college, beginning with a student loan and moving on to other trade lines such as a credit card or a car loan. But do they really understand the impact that every day decisions have on their credit score – and why it is so important? This session will cover a myriad of topics related to credit and credit scores with a focus on the downstream impact of credit decisions for students. Tools and tips will be provided that will help you counsel your students on this important topic.

6:00 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, February 4**

8:00 am –10: 15 am Exhibits Open

9:00 am – 10:00 am Verification: How offices handled it the current. *Hendricks A*

year and beyond.

Panelists: Sue Almon, Carrie Bishop, Melissa Smurdon, Monique Ware

Verification is an administrative process by which the Department requires a subset of federal student aid applicants who are eligible for Pell Grants to submit additional documentation, such as transcripts of tax returns, to verify their income and other information reported on the Free Application for Federal Student Aid (FAFSA) form. As a result, the verification process disproportionately burdens students from low-income backgrounds and students of color (US Department of Education, 2021, p. 1). The U.S. Department of Education (Department) announced temporary changes to the federal student aid verification process for the 2021–22 award year. The temporary changes will provide relief to millions of students and colleges facing challenges as a result of the COVID-19 pandemic (US Department of Education, 2021, p. 1). Join use for a video followed by a panel discuss on this very important topic.

10:00 am – 10:15 am Break

10:15 am – 11:15 am Breakout Sessions *(choose one of the following three sessions)*

Financial Literacy *Hendricks C*

Presenter: Phil Schuman

Moderator: David Kafafian

COVID has made financial wellness programs more important than ever on college campuses, and financial aid offices play a key role in implementing successful programming. During this session, the presenter will provide an overview of a national benchmarking study of student financial wellness programs, discuss how to develop a program on your campus that is scalable and personalized to student needs, and discuss how COVID has affected how financial wellness programs operate.

Positioning Yourself on Campus *Hendricks D*

Presenter: Heidi Carl

Moderator: Steve Queisser

Are you new to your campus or been there a while but feel like you need to take action to help financial aid have a voice in major campus decisions? Come learn more about yourself, how to partner with your boss and steps you can take to learn more about your campus too. Don’t miss out on this opportunity to position yourself and your financial aid team as an asset to your campus.

Destressing Yourself in the Office *Hendricks E*

Presenter: Sara Monday

Moderator: Melinda Middleton

Are you stressed? Sara will give you tips on how to destress and reduce tension in the workplace and at home.

11:15 am – 12:15 pm Lunch *Hendricks B*

12:00 pm – 1:00 pm CHE Update *Hendricks B*

Presenter: Josh Garrison

Moderator: Sarah Soper

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

**Thank you for Attending!!**

***We want to extend a special Thank You to Citizens, Earnest and INvestEd***

***for their generous donation through an ISFAA Sponsorship.***

***As well, a heartfelt thank you to all of the vendors who extend their time and talents to help make our conference a success!***

|  |
| --- |
| Ascendium Education |
| CampusLogic |
| Cognition Financial |
| College Ave |
| College Choice 529 |
| College Raptor |
| Discover |
| Earnest |
| Edamerica |
| ELM Resources |
| Inceptia |
| INvestEd |
| KHEAA |
| Nelnet |
| PNC |
| Sallie Mae |
| SoFi |
| Stride Funding |
| Student Connections |

A Little Bit of History

Excerpts taken from "A Summary of ISFAA History" by Sue Allmon

Our state Association, now known as the Indiana Student Financial Aid Association, had its humble beginnings in 1935. At that time, the Indiana General Assembly passed legislation that mandated that fee remission awards be made to students on the basis of competitive testing. In search of fairness and continuity and perhaps a touch of wanting to keep "big brother" government at a distance, the four state universities agreed to complete the testing required for these fee remission awards.

In the 1940’s, our state Association, through its membership, was instrumental in the creation of what we now know as the "Financial Aid Office". Prior to this separation, financial aid was a stepchild of student services. It was during the 1940’s that the financial aid function was recognized as an individual office and her functions were separated from those of the admission’s and registrar’s offices. Private colleges and universities were invited to join the Association in 1952. The Association’s constitution was rewritten several times until the early 1980’s, when some far-sighted individuals convinced the Association to switch from a constitution based organization to one of by-laws. This switch enabled the Association to make more immediate updates to our policies as warranted by the climate of the times.

When not creating organizations, the Association kept busy assisting in the creation of government programs and training opportunities. Several association members had their hands in the shaping of the Higher Education Act of 1965 (the original bill, not just the amendments). In fact, Senator Vance Hartke of Indiana was a co-sponsor of the Higher Education Act of 1965. We were also, at the time, active in the drafting and passage of the State Scholarship Act of Indiana in 1965, which led to the creation of our good colleague SSACI.

What we were then and what we are now is a professional association, a forum for the exchange of ideas, a support group, and a vehicle for communication with other groups and the public at large. Above all, ISFAA's primary goal is to help students achieve their educational potential by providing appropriate financial resources.