



**OVERCOMING
CHALLENGES**
Exceeding Expectations
MAFAA FALL CONFERENCE 2007

MAFAA Fall Conference Agenda
“Overcoming Challenges, Exceeding Expectations”

Wednesday, November 14, 2007

8:00 a.m. – 1:00 p.m.	Registration (A map is enclosed in the booklet)	4th Floor Registration Room
8:00 a.m. – 11:30 a.m.	Leadership Symposium Breakfast/Meeting	Birch / Maple Lake
8:30 a.m. – 9:00 a.m.	Pre-Conference Registration	Deer / Elk Lake
9:00 a.m. – 11:30 a.m.	Pre-Conference Workshop: Exploring the New Religious Landscape The religious landscape of America has undergone tremendous change since the Immigration Act of 1965, with the United States now considered the world’s most religiously diverse country. Over the years we have seen the growth of religious diversity in Minnesota and on our college campuses where students arrive with a vast array of religious beliefs. Participants of this workshop will be provided with a basic understanding of several of the world’s religions (Hinduism, Buddhism, Islam, and Judaism will be highlighted) and will explore religious diversity as a way to understand and appreciate the different religious and spiritual practices of our students and colleagues. A religious studies expert will provide foundational information about several of the world’s religions and a student panel representing various religions will share their thoughts and experiences.	Deer / Elk Lake
11:00 a.m. – 1:00 p.m.	Vendor Displays	4th Floor Atrium
	Raffle Room Open	Crystal Lake
12:00 p.m. – 1:00 p.m.	Lunch	Ballroom 1 / 2
1:00 p.m. – 2:15 p.m.	President’s Welcome Scott Roelke, MAFAA President	Ballroom 1 / 2
	Keynote Speaker	Ballroom 1 / 2
	Working Side by Side with Different Generations David Stillman, Co-founder and Partner, BridgeWorks, LLC David A. Stillman is co-founder of BridgeWorks, LLC which is dedicated to enlightening organizations on who the generations are in today’s workplace and what makes them click, clash and collide. Generations expert, speaker, and writer David Stillman is one of the rare Generation X keynoters on the speaking scene today. Recently named to the prestigious list of <i>Forty Under 40</i> movers and shakers by the	

The Business Journal, David's blend of honesty, irreverence, energy, and inspiration earn him the highest marks from corporate and association audiences alike.

- 2:30 p.m. – 4:00 p.m. **Vendor Displays Open** **4th Floor Atrium**
- Raffle Room Open** **Crystal Lake**
- 2:30 p.m. – 3:45 p.m. **Concurrent Sessions**
- **Access to Higher Education** **Deer / Elk Lake**
Natala Hart, The Ohio State University
Tally Hart is regarded nationally as a leading authority on and advocate for access to higher education for all. Affordability of college is often a concern among low-income students; however, it is also becoming a serious issue for middle-income families. This session will review what patterns and programs can assist students in gaining access to higher education so we can improve their educational opportunities.
 - **Washington Update: A Big Year for Student Loans** **Ballroom 3 / 4**
Harrison Wadsworth, Washington Partners, LLC
A review of Washington developments impacting student aid. A look at this year's bumper crop of student loan legislation and the policy goals reflected in it. A special focus of this session will be new regulation of student loan marketing practices. Mr. Wadsworth has been advising FFEL loan providers and institutions how best to comply with the new regulation of student loan marketing practices.
- 3:45 p.m. – 4:00 p.m. **Break** **4th Floor Atrium**
- 4:00 p.m. – 5:00 p.m. **Interest Sessions**
- **Welcome to MAFAA / Newcomers Session** **Birch / Maple Lake**
Kathy Ruby, Director of Financial Aid, St. Olaf College
David Vikander, Director of Financial Aid, Southwest Minnesota State University
This session will explain the various MAFAA offices and committees so you can see how you can become involved in the association. This session will also discuss MAFAA's Leadership Symposium program.
Session attendees will be attending dinner immediately following this session.
**** Pre-registration for this session is required.**
 - **One on One with Jamie Malone** **Ballroom 3 / 4**
Jamie Malone, U.S. Dept of Education
Always a favorite and often requested session, Jamie is here once again to help resolve industry challenges. Bring your questions or just come to sit back and listen.
 - **Introduction to Microsoft Access 2007** **Deer Lake**
Robert Bode, Director of Student Financial Aid
Metropolitan State University
This session will provide a brief overview of Microsoft Access 2007 and will review some of the new features of the database. We will also cover basic information such as tables, queries, and reports, and discuss how you can use "links" to connect your Access database to your student information system.
 - **Putting Student Record Information at Parent's Finger Tips** **Elk Lake**
Vicki Larson and Julie Selander, University of MN

This session will highlight an online web tool built by the University of Minnesota that allows students to authorize their parents and other guest “view only” access to six different areas of their online student record (including grades, enrollment information, holds, financial aid awards and status, and student financial transactions.

8:00 p.m. – 10:00 p.m. **Trivial Pursuit Game Night**

Marriott Bar

***Come with a team or come alone as teams will be made prior to 8 p.m.**

***Prizes will be awarded!**



DON'T FORGET TO JOIN IN THE RAFFLE!

All proceeds go to the Yellow Ribbon Suicide Prevention Program of Minnesota

The raffle will close on Thursday at 4:00 p.m.

Winners will be posted at 4:30 p.m.

Thursday, November 15, 2007

7:30 a.m. – 8:45 a.m.

Breakfast

Ballroom 1 / 2

8:00 a.m. – 10:00 a.m.

Registration

4th Floor Registration Room

8:00 a.m. – 10:00 a.m.

Vendor Displays

4th Floor Atrium

Raffle Room Open

Crystal Lake

8:45 a.m. – 9:45 a.m.

Interest Sessions

• Basic Tax Session

Elk Lake

Jim Briggs, The Tax Detective

A review of the following lines of the 1040 and how they impact needs analysis: Lines 1 - 21; 23 – 35; 57; 60; 66a; 67. Questions will be encouraged during the session as time permits. The discussion will be centered on how the 1040 relates to federal methodology, what constitutes conflicting information and what is required for verification.

• Internet Campus Crimes

Ballroom 3 / 4

Lt. Troy Buhta and Sgt. Erik Stenemann

University of Minnesota Police Department

This session will review campus internet crimes and how we can assist our students to be safe while accessing internet usage. Lt. Buhta will provide several case examples which will prove to be very interesting. You won't want to miss this session!

• Master's Leadership: Let's Graduate!

Birch / Maple Lake

David Vikander, Financial Aid Director

Southwest Minnesota State University

Are you a MAFAA member who has been involved in several aspects of MAFAA over the years? If so, you may have already completed the necessary requirements to graduate from the Master's Leadership program. This session is designed for MAFAA members to bring their personal list of achievements/involvement to the session and have them reviewed for possible Masters Leadership qualifications. The session leaders will coach you with any requirements that are needed for you to graduate from the Masters Leadership program. Come join in on this session and be recognized for your deserving achievements!

• **Guide for Developing Your Lender List: An RFI Template** **Deer Lake**

Ed Schroeder, Great Lakes Higher Education Corporation
Diane Borchardt, Education Assistance Corporation

This session is intended to help schools develop effective RFI's. The session will include what questions to ask and how to evaluate the responses that are received from lenders. This will be a great session for schools that are new to writing and evaluating RFI's or for schools wanting to review their process in light of recent regulations.

• **How to Create a Successful Financial Aid Counselor Training Program** **Pine / Cedar Lake**

Carrie Zastrow and Heather Peterson, University of MN

We all know how important the right training is for financial aid counselors; yet, the task of providing this training can seem insurmountable. How do you get new employees up to speed fast? How do you provide refresher training and still keep operations running? Come learn how the University of Minnesota – Twin Cities, developed their comprehensive training program for new staff and continued refresher training for existing staff. This session will highlight the importance of having designated people to coordinate your training efforts, developing user friendly and easily updatable training materials, and adapting training and schedules to the different needs of your employees. These training strategies will build teamwork in your office, as well as improved communication to your students.

9:45 a.m. – 10:00 a.m. **Break**

4th Floor Atrium

10:00 a.m. – 11:30 a.m. **General Session**

Rachel's Challenge

Ballroom 3 / 4

Larry Scott, Uncle to Rachel Joy Scott

Rachel's Challenge is the largest school assembly program in America. It is designed to help school administrators, parents, and students create safer and more productive places to learn and achieve. The goal is to motivate and equip students to embrace new values of kindness and compassion so that no child is left behind because of fear and violence in their school. The program is based on an essay entitled "My Ethics, My Codes of Life" written by Rachel Joy Scott, one of the students killed at Columbine High School on April 20, 1999. In it, she issued a challenge to her generation.

11:30 a.m. – 12:15 p.m. **Lunch**

Ballroom 1 / 2

12:15 p.m. – 12:45 p.m. **MAFAA Charity:
Yellow Ribbon Suicide Prevention Program – Jody Becker**

Ballroom 1 / 2

Years of Service Recognition

Ballroom 1 / 2

Scott Roelke, MAFAA President
Stuart Perry, MAFAA Awards Committee Chair

1:00 p.m. – 2:00 p.m. **Interest Sessions**

• **Intermediate Tax Session**

Elk Lake

Jim Briggs, The Tax Detective

An in depth review of the following schedules of the 1040 and how they impact needs analysis: Schedules B, Schedule C, Schedule D Gains & Losses, Schedule E Rental Income & "Pass-through" Income from Partnerships, S-Corps and Limited Liability Companies. Questions will be encouraged during the session as time permits. The discussion will be centered on how the 1040 relates to federal

methodology, what constitutes conflicting information and what is required for verification.

• Be a Link – Save a Life **Pine / Cedar Lake**

Marissa Lachmiller, Youth and Community Coordinator

An Adult Gatekeeper training which will train participants to identify the symptoms of depression, the warning signs of suicide & important risk & protective factors for suicide. Learning to identify these important clues can help anyone to be a LINK to life for someone who may be suicidal. By learning the steps in the LINK protocol, participants can be empowered to act when they suspect someone is suicidal & connect them to a lifesaving mental health services.

• Dependency Override **Deer Lake**

Jamie Malone, U.S. Dept. of Education

"What's a dependency override? What does the law say? What's appropriate and what's not? Bring your examples to discuss."

• Regulations and Relationships: New **Ballroom 3 / 4**

Guidance for Schools and Lenders

Ed Schroeder, Training Consultant, Great Lakes Higher Education Corporation

Learn about regulations, to be finalized November 1, that will guide relationships between schools and lenders. Also, review proposed legislation and Codes of Conduct that affect all schools in light of the new regulations.

• Budgeting and Awarding **Birch / Maple Lake**

Diane Borchardt and Ken Wallace

Client Relations Managers, Education Assistance Corporation

A basic overview of budget construction and various awarding models will be presented. Following the review, Jayne Dinse, Tom Hensch, Jeff Olson and David Vikander, four Directors of Financial Aid, will provide their insight. They will describe creating a budget for their students and developing an awarding policy at their institutions.

1:00 p.m. – 4:00 p.m.

Vendor Displays

4th Floor Atrium

Raffle Room Open

Crystal Lake

2:15 p.m. – 3:15 p.m.

Concurrent Sessions

• Veterans: Challenges Soldiers Face Returning to Colleges **Deer / Elk Lake**

**David Thompson, Military Family Life Consultant
Minnesota National Guard**

Coming home from war has never been easy. Thousands of combat veterans are returning to communities around Minnesota. They and their families face the challenges of putting their lives back together. For those re-entering college or starting college for the first time, they will need some help in adjusting to their surroundings. Find out how we can help our veterans returning from war.

• Educationomics: Stuck in the Middle **Ballroom 3 / 4**

**Jon McGee, Vice President for Enrollment, Planning and Public Affairs
College of Saint Benedict/St. John's University**

This session will look at middle income/upper-middle income families and their financial situation. The presentation is based on research Mr. McGee has completed on the middle class which should help those in higher education to better understand the middle class – not only income and economics, but also about lifestyle choices and expectations.

3:15 p.m. – 3:30 p.m.	Break ** Vendor and Raffle Areas Close at 4:00 p.m. **	4th Floor Atrium
3:30 p.m. – 4:30 p.m.	Interest Sessions	
	<ul style="list-style-type: none"> • Advanced Tax Session Jim Briggs, The Tax Detective An overview of corporations, Subchapters-S, Partnerships, LLC's and Trusts. Questions will be encouraged during the session as time permits. The discussion will be centered on how these tax returns relate to federal methodology, what constitutes conflicting information and what is required for verification. 	Elk Lake
	<ul style="list-style-type: none"> • The Four Partners: A Shared Responsibility Model for College Funding Mick Endersbe, President, College Planning University College savings plans, low-interest loans, college admissions consultants, scholarship services and financial literacy have served as convenient distractions from the fact that college is expensive, families on average save nothing, federal assistance is limited and the average college student lives an affluent lifestyle. Learn a simple proven model that allows us to share the truth about paying for college and hold ourselves and the families we serve accountable for the financial decisions we must make. 	Deer Lake
	<ul style="list-style-type: none"> • FERPA: Shall, Must, May Susan Neppi, Training Consultant Great Lakes Higher Education Corporation Shall, Must, May – little words can mean a lot when it comes to compliance. This session will cover your institution's responsibilities and the rights of the student under the Family Educational Rights and Privacy Act. 	Birch / Maple Lake
	<ul style="list-style-type: none"> • Emotional Intelligence in the Workplace Julia Benz, Financial Aid Director, The Ohio State University Emotional Intelligence is comprised of two distinct competencies, personal and social. Come to the session and learn more about these competencies and how to assess the individuals within your organization. We will discuss the competencies that are most important for the various types of jobs we have within financial aid. We will also discuss best practices in ensuring that we use the competencies we have to their highest potential within our organizations. 	Pine / Cedar Lake
	<ul style="list-style-type: none"> • New State Programs Update Megan FitzGibbon, Minnesota Office of Higher Education Lara Gerhardson, MISP Outreach Liaison Two new state financial aid programs created by the 2007 Legislature and the transfer of the Minnesota Indian Scholarship to the Minnesota Office of Higher Education provide students with more aid opportunities this year. This session will review the three programs; provide updates on the progress to electronic application processes and an introduction of the MN Indian Scholarship Outreach Liaison, Lara Gerhardson. 	Ballroom 3 / 4
4:30 p.m.	Raffle Winners Posted / Pick up Items	Crystal Lake
4:30 p.m. - 5:00 p.m.	Sector Meetings Associates * Private non-profit University of Minnesota State Universities Two year public Private for profit	Deer Lake Elk Lake Cedar Lake Pine Lake Birch Lake Maple Lake

**Non financial supporting Associate Members (Trio, etc) should attend their respective school type meeting.*

5:00 p.m. – 6:00 p.m. **President's Reception** **Prefunction Room**
Scott Roelke, MAFAA President **(Center of Ballrooms)**

***Dinner On Your Own**

Friday, November 16, 2007

7:30 a.m. – 8:30 a.m. **Breakfast** **Ballroom 1 / 2**

8:30 a.m. – 9:30 a.m. **Interest Sessions**

Financial Aid Management Systems

- **Banner, Sandy Goman** **Birch Lake**
- **ISRS, Mike Uran** **Maple Lake**
- **PowerFaid, Paul Terrio** **Pine Lake**
- **EMAS - SARA, Donna Jager** **Cedar Lake**
- **EDE/COD, Jamie Malone** **Crystal Lake**

- **Implementing a Financial Literacy Program** **Deer / Elk Lake**
On Your Campus: You Can Do It With A Little
Help From Your Friends
Murphy Cannon, Minneapolis Community/Technical College
Janna Davis, Capella University
Natala Hart, The Ohio State University
Sarah Black, Augsburg College student

Offering a Financial Literacy program on your campus can provide students with the skills they need to make sound financial decisions. Knowing which type of delivery method is best for your students and the topics that should be covered can be a daunting task. This session will discuss the different methods for delivery, what researchers are finding to be most effective, and how to get started. Get advice from a panel of your colleagues who have recently implemented financial literacy programs on their campuses. Hear what worked, what didn't, and their plans for improvements.

- **Recapturing our Profession – Taking the** **Ballroom 3 / 4**
High Road

Clark Wold, President, Education Assistance Corporation

During this time when the financial aid profession has received more criticism and scrutiny than ever before, it's important to remind ourselves how important the work that we do is for our students. It's time to step back from the emotions of the fray, examine the lessons learned, and recommit to being certain that we're always working in the best interests of the students.

9:45 a.m. – 12:00 p.m. **State Update** **Ballroom 3 / 4**
Ginny Dodds, Cheryl Maplethorpe, and Megan FitzGibbon
Minnesota Office of Higher Education

Federal Update **Ballroom 3 / 4**
Jamie Malone, U.S. Department of Education

*** The Conference Evaluation Form will be online after the conclusion of fall conference.**