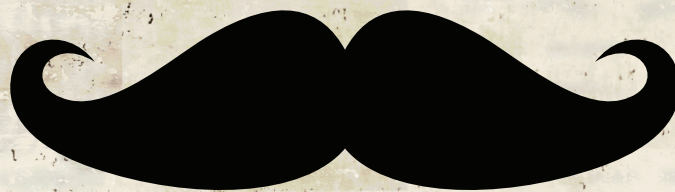


# **AGENTS of CHANGE**

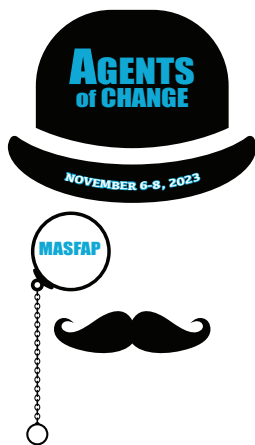
**NOVEMBER 6-8, 2023**

**MASFAP**



**Conference Program 2023**  
**Lake of the Ozarks, Missouri**





# Welcome Agents!

It is with great excitement and anticipation that we welcome you to the Lodge of the Four Seasons and the 2023 MASFAP Conference where we gather as “**Agents of Change**” to shape the future of financial aid in Missouri and beyond.

The financial aid landscape is constantly evolving, and it’s our responsibility to be the driving force behind positive change. As “**Agents of Change**”, we have the unique opportunity to empower students, institutions, and communities through our collective expertise and dedication to making education accessible to all.

Over the next few days, we have an exciting lineup of sessions, trainings, and discussions that will equip you with the knowledge and tools to drive change and create a more inclusive and equitable financial aid system. You’ll have the chance to connect with fellow professionals, share best practices, and gain fresh insights into the ever-evolving world of financial aid.

As we embrace the theme of “**Agents of Change**”, remember that each one of you plays a crucial role in shaping the future of financial aid. Your dedication, passion, and expertise are the driving forces behind the positive transformations we can achieve together.

We hope you leave this conference with fresh insights, a renewed sense of purpose, and a network of colleagues who share your commitment to change. Thank you for being a part of this exciting journey with us.

## IMPORTANT INFORMATION ABOUT THE CONFERENCE

### NAME BADGES

Name badges are required for admissions to all conference sessions, meal functions, and activities. This helps with networking, knowing where someone is from, being able to identify those with the same responsibilities and (for those of us who are bad with names) it will help us remember your name when we visit. Lost your name badge? Go to the Registration desk in the Granada Foyer to obtain a replacement.

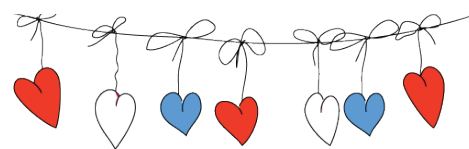
### CONFERENCE ATTIRE

Attire for the conference is business casual. During evening activities please feel free to change to jeans.

### MEETING ETIQUETTE

Sensitive to the concerns of our members, MASFAP affirms the right of all individuals to function in an environment free of offensive behavior.

- No talking during presentations and please refrain from having loud conversations directly outside of the meeting room.
- Silent all cellphones, watches, and any electronics during conference functions
- Use perfume or cologne sparingly, as others around you may be allergic



### Big Thank Yous!!!

MASFAP would like to extend a special thank you to all our Corporate Support Companies for supporting MASFAP this year.

A very special thank you to Kathy Dixon and the staff at MOHELA for their contribution in the design of the MASFAP Conference program and all the Conference Materials.

# Presidents Welcome



**I** am excited to welcome you to the 2023 MASFAP Conference! It is always a great time for us to re-connect with our colleagues and friends, re-charge our batteries having a few days away from the office madness, and re-learn everything we do (with thanks to the new “Better FAFSA...”).

This conference will be unique among past ones we have attended because of the new FAFSA, the rollout of new terminology (Contributors, Consent, SAI,...) and new calculations for the Pell Grant.

The Program Committee has worked hard to organize this conference into one that is both educational and entertaining. Not only will we share and learn the latest on all of the new changes coming for 24-25, but we must work to build relationships with fellow financial aid professionals and Associate Members to present a united front in rolling out all of these exciting changes! I encourage you to make the most of what MASFAP will be offering at this conference, and you will not be disappointed!

In many ways, we are pressing “reset” on our professional lives and it is scary! It does not have to be, though, because we have each other, and so many other resources, to navigate these rough waters to become **Agents of Change!**

Tony Lubbers  
2023 MASFAP President





# Evening Activities

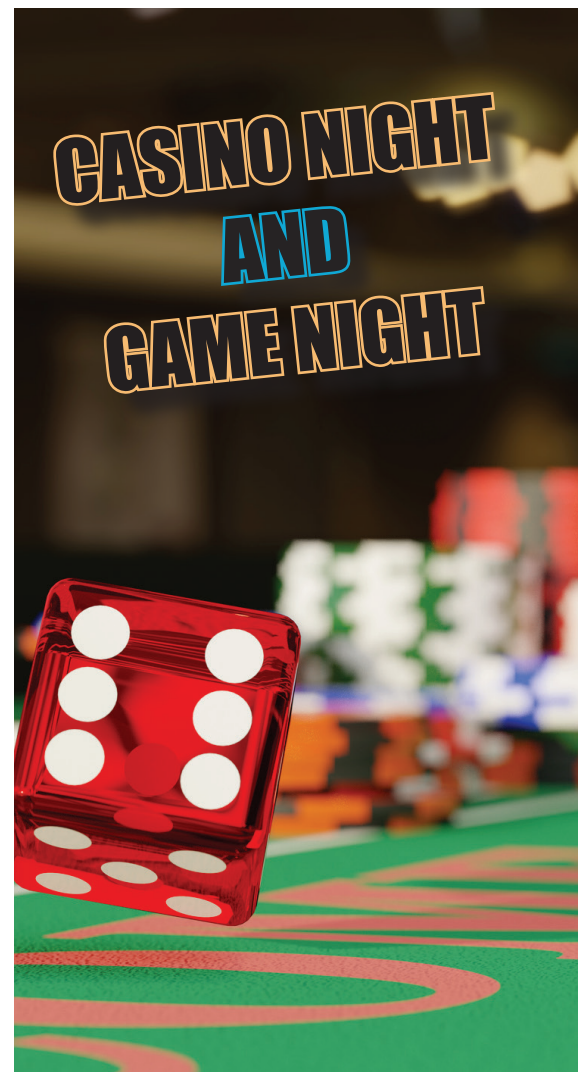


## Check out the wonderful Silent Auction Baskets!

Breakfast Basket  
 Pet Basket  
 Family Game Night  
 Travel Basket  
 Snuggle Basket  
 A Cozy Winter's Night  
 Missouri Basket  
 Fall in Love  
 Taco Basket  
 Trader Joe's Basket  
 Campfire Basket  
 Seasonal Fall Basket  
 For the Love of Christmas  
 Chocolate Lovers Basket



**& more!**





## Children's Emergency Shelter

has been housing children for more than 20 years. Children, ranging from birth to 18 years old, come to Rainbow House due to circumstances beyond their control. They may be admitted by Children's Division because they have been removed from their home and will stay at Rainbow House until a foster placement can be found, or they may be admitted through our Crisis Care Program. This is truly a "prevention" service in that it gives the parent respite time to establish stability in their lives, possibly preventing abuse or neglect to the child. Through home-cooked meals, recreational outings and activities, and loving nurturing house parents we hope to return the feeling of family and stability to each child at the Shelter. This safe environment allows them to put side their troubling thoughts and just be kids again!



## Child Advocacy Center (CAC)

is a collaborative investigative partner of multidisciplinary teams from eleven counties in the mid-Missouri area. Together with law enforcement, juvenile court, Children's Division and prosecutors from Adair, Audrain, Boone, Callaway, Cole, Cooper, Howard, Macon, Monroe, Randolph & Shelby counties, we strive to provide a thorough investigation of child sexual and severe physical abuse cases, always putting the best interest of the child first. The CAC provides forensic interviews, Sexual Assault Forensic Exams, and advocacy for children and families.



## Clinical Programs

at Rainbow House encompasses the therapy services and outreach programs that we provide to the families and children we serve. Rainbow House provides therapy to children through the Children's Emergency Shelter and Child Advocacy Center. The Children's Shelter offers therapy and resource assistance both while the child is in residence and after they leave our doorstep. The CAC provides therapy services and referrals to children and families post-forensic interview. Outpatient therapy for victims of sexual abuse (who have not had interviews at the CAC) is available on a limited and short-term basis for both individuals and families. We also assist families in connecting with other qualified therapists for long-term and out-of-county counseling needs. Our Family Advocate Program serves the child and non-offending caregiver who have been victimized through child abuse and neglect. We are also actively involved in community education through parenting classes and creating community awareness.



## Rainbow House Mission

The Mission of Rainbow House is to keep children safe and to support families in crisis through prevention, assessment and intervention in child abuse and neglect.



**Lunch Box \$20**

**Backpack \$35**



# Menu

## MONDAY, NOVEMBER 6<sup>TH</sup>

*Newcomer and Executive Board Breakfast:* Sliced seasonal fruits and berries, Fruit Yogurts, Assorted Cold Cereals, Scrambled Eggs, Apple-Wood Smoked Bacon, Sausage, Breakfast Potatoes, French Toast with Pure Maple, Skim and 2% Milk, Coffee, Tea, Orange Juice

*Lunch:* Variety of Boxed Lunches

*Dinner:* Chicken Oreganata or Honey-Garlic Glazed Salmon (chosen at the time of registration); House Garden Salad, Fresh Baked Rolls



## TUESDAY, NOVEMBER 7<sup>TH</sup>

*Breakfast:* Sliced seasonal fruits and berries, Fruit Yogurts, Assorted Cold Cereals, Scrambled Eggs, Apple-Wood Smoked Bacon, Sausage, Breakfast Potatoes, French Toast with Pure Maple Syrup, Skim and 2% Milk, Coffee, Tea, Orange Juice

*Lunch:* Fajita Seasoned Chicken with Corn and Black Beans, Fresh Pico de Gallo, Shredded Jack Cheese, Topped with Green Onions, Tortilla Strips and a Wedge of Lime, Fresh Baked Rolls

*Dinner:* Tender Roast Beef, Slow Cooked with New Potatoes and Root Vegetables, Pan Gravy; House Garden Salad, Fresh Baked Rolls



## WEDNESDAY, NOVEMBER 8<sup>TH</sup>

*Breakfast:* Sliced Seasonal Fruit and Berries, Assorted Scones, Fruit Danish Pastries, Assorted Scones, Assorted Bagels with Cream Cheese, Butter & Preserves

*Brunch:* Sliced Seasonal Fruits and Berries, Apple-Wood Smoked Bacon, Home Fried Breakfast Potatoes, Eggs Benedict, Scrambled Eggs, Assorted Fresh Baked Breads, Chicken Milanese, Blackberry Peppercorn Pork Loin, Omelet Station





# MASFAP's



## Who's Making a Difference Scholarship

It is that time of year again when students are filing FAFSAs and applying for scholarships. MASFAP's Early Awareness is on the front lines helping complete FAFSAs, offering training to high school counselors and handing out scholarship money!

Last year we were able to award five students with a one-time \$1000 scholarship to use in the first year of post-secondary education in Missouri.

We are excited to be able to offer this opportunity again this year! We opened the *MASFAP Who's Making a Difference Scholarship* through My Scholarship Central in September. My Scholarship Central is an easy-to-navigate scholarship resource that students can use to find and apply for scholarships across Missouri.

**The committee has narrowed the applicants down to the top ten, and now we need you to help us pick the top five (5).**

### **WHAT WE NEED FROM YOU, THE MEMBERSHIP:**

1. Take a moment on Monday or Tuesday before 5:00 p.m. to read over the essays.
2. Locate your tickets: You should have received five blue tickets in your registration packet.
3. Vote for the five essays – the applicants who you believe are the most deserving.

# Executive Board Members

**Tony Lubbers, President**

Director of Student Financial Assistance  
University of Central Missouri

**Matthew Kearney, President-Elect**

Director of Student Financial Services  
Southeast Missouri State University

**Cassandra Hicks, Past-President**

Director of Financial Aid  
Southeast College of Nursing and Health Sciences

**Valerie Jensen, Vice President**

Deputy Director of Student Financial Services  
Washington University in St. Louis

**Jamie Davis, Treasurer**

Associate Director of Compliance and Operations  
University of Missouri - Columbia

**Keri Gilbert, Treasurer-Elect**

Director of Financial Aid  
Stephens College

**Kimberly Meeker, Past-Treasurer**

Director of Financial Aid  
North Central Missouri College

**Marla Fernandez, Secretary**

Director of Financial Aid  
Truman State University

**Julie Finn, Delegate at Large (Associate Members)**

Head of Campus Development  
College Ave Student Loans

**Emily Haynam, Delegate at Large**

Executive Director of Student Financial Aid  
University of Missouri-Columbia

**Angel Mefford, Delegate at Large**

Director of Financial Aid and Veteran Services  
State Fair Community College

**Jennifer Wright, Delegate at Large**

Director of Student Financial Services  
Rockhurst University

**Leroy Wade, Ex-Officio**

Deputy Commissioner of Higher Education  
Missouri Department of Higher Education and Workforce Development

# Program Committee

**Valerie Jensen (Chair)**, Washington University in St. Louis

**Alexandria Miller**, Missouri Scholarship and Loan Foundation

**Amy Hager**, Moberly Area Community College

**Anita Radcliffe**, Washington University in St. Louis

**Brice Baumgardner**, Hannibal-LaGrange University

**Cassandra Hicks**, Southeast Health College of Nursing and Health Sciences

**Charissa Davis**, University of Central Missouri

**Charles Mayfield**, Northwest Missouri State University

**Dan Dick**, Washington University in St. Louis

**Dena Norris**, Metropolitan Community College

**Ginny Burns**, MOHELA

**Hannah Masters**, Cottey College

**Hannah Smith**, Saint Louis University

**Jamie Davis**, University of Missouri

**Janice Barnes**, Saint Louis University

**Julie Loftin**, Ozarks Technical Community College

**Kaley Williams**, Kansas City University

**Kari Lenz**, University of Missouri

**Kathy Dixon**, MOHELA

**Kerry Hallahan**, Logan University

**Kim Howe**, DHEWD

**Kimberly Meeker**, North Central Missouri College

**Krissy Loenneke**, Southeast Health College of Nursing and Health Sciences

**Laurel Miller**, Logan University

**Matthew Kearney**, Southeast Missouri State University

**Melissa Findley**, Missouri Scholarship and Loan Foundation

**Paula Carpenter**, Jefferson College

**Sara Edwards**, Citizens Bank

**Stephen Garman**, Ozarks Technical Community College

**Tony Lubbers**, University of Central Missouri

**Will Shaffner**, MOHELA



# Committee Chairs

## Access MO Ad Hoc - April Mason

Senior Assistant Director, Student Support Services, University of Missouri

## Access MO Ad Hoc - Leroy Wade

Deputy Commissioner of Higher Education, Missouri Department of Higher Education and Workforce Development

## Archives - Becca Diskin

Director of Financial Aid, Missouri Southern State University

## Association Governance and Legal Concerns - Cassandra Hicks

Director of Financial Aid, Southeast College of Nursing and Health Sciences

## Awards - Jason Enright

Assistant Director of Financial Aid, Stephens College

## Communications - Melissa Findley

Executive Director, Missouri Scholarship and Loan Foundation

## Corporate Support - Ginny Burns

Director of Loan Servicing, MOHELA

## Early Awareness - Cherelle Washington

Director, College Access and Career Readiness, Missouri College and Career Attainment Network

## Early Awareness - Taylor Grimm

Program Manager, Missouri Scholarship and Loan Foundation

## Leadership Development - Amy Hager

Director of Financial Aid, Moberly Area Community College

## Legislative - Zach Greenlee

Director of Student Financial Services, Missouri Baptist University

## Legislative - Will Shaffner

Director Business Development and Government Relations, MOHELA

## Membership - Krissy Loenneke

Financial Aid Specialist, Southeast College of Nursing and Health Sciences

## Mentorship Ad Hoc - Cassandra Hicks

Director of Financial Aid, Southeast College of Nursing and Health Sciences

## Newcomer - Charissa Davis

Assistant Director of Financial Assistance, University of Central Missouri

## Newcomer - Julie Loftin

Financial Aid Advisor, Ozarks Technical Community College

## Professional Development - Dena Norris

Associate Vice Chancellor of Student Financial Services, Metropolitan Community College

## Professional Development - Kaley Williams

Associate Director Student Financial Aid, Kansas City University

## Research - Anna Plattner

Financial Aid Administrator/Marketing Coordinator, Grand River Technical School

## Site - Alexandria Miller

Scholarship Program Manager, Missouri Scholarship and Loan Foundation

## Technology - Hannah Masters

Executive Director of Financial Aid and Student Accounts, Cottey College

**WANT TO JOIN A COMMITTEE?**  
You can volunteer now by scanning the QR code





# **Exhibitors**

**Asendium Education**

**Citizens**

**College Ave Student Loans**

**Discover Student Loans**

**Earnest Student Loan**

**ELM Resources**

**Inceptia**

**ISL Education Lending**

**KHEAA/KHESLC Advantage Education Loan**

**Missouri College and Career Attainment Network**

**Missouri Department of Higher Education and Workforce  
Development**

**Missouri Scholarship & Loan Foundation**

**MOHELA**

**Nelnet Bank**

**PNC Bank**

**Sallie Mae**

**SoFi**





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We are excited to meet you and discuss potential opportunities, and share news about MOHELA.

*Thank you* for stopping by our booth!

Will Shaffner | [WillS@mohela.com](mailto:WillS@mohela.com)  
Lisa Ciritella | [LisaCi@mohela.com](mailto:LisaCi@mohela.com) | Kathy Dixon | [KathyD@mohela.com](mailto:KathyD@mohela.com)

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Citizens' Multi-Year Approval<sup>SM</sup> means more time to focus on school and less time worrying about how to pay for it.

- Easy application process
- Flexible terms
- Personalized expertise
- No application or origination fees

**See How Citizens Stacks Up**

	Citizens Multi-Year Approval	Sallie Mae Multi-Year Advantage	College Ave Multi-Year Peace of Mind
Pre-qualified financing for future fund requests	✓	✗	✗
Won't impact credit score to request additional funds*	✓	✗	✗
Apply once for a loan	✓	✗	✗
Future financing approval rate	99%**	95%	90%

Information as of 10/26/2023  
 \*The percentage of borrowers is based on all applicants who applied for additional funds from Citizens between October 1, 2021 and October 1, 2022. The percentage represents only borrowers who had previously accepted the Multi-Year Approval offer.

**We're here for answers.**  
 Email [schoolservices@citizensbank.com](mailto:schoolservices@citizensbank.com) or visit [citizensbank.com/faa](https://citizensbank.com/faa) to learn more.

\*Multi-Year Approval: Funds available for future use are subject to a soft credit inquiry at time of your next request to verify continued eligibility. After we make the initial loan to you, we may refuse to allow you to take out additional loans under the Multi-Year Approval feature. Terms and conditions will be outlined in your promissory note.  
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*Stop by our booth!*



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- Director's Choice Emergency Grant
- Finish Line Degree Completion Grant
- Missouri Family Education Loan Program (MOFELP)
- My Missouri Scholarship Promise Program
- Purdy Emerging Leaders Scholarship

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This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. At the top center, there is a small black circle, possibly representing a hole punch or a decorative element. The overall appearance is that of a clean, unused piece of stationery.



# Keynote Speaker



**Jeff Lanza**  
**Retired FBI Agent**  
**Keynote Speaker**



Jeff was an FBI Special Agent for over 20 years, during which he investigated cybercrime, organized crime, human trafficking, and terrorism. Jeff has lectured at Harvard and Princeton Universities and written two highly reviewed books. He is featured in a Netflix documentary about the FBI and he often appears on national television news programs where he talks about the growing threat of cybercrime.

## **More information about Jeff:**

Jeff was chosen as the best speaker in the 50-year history of Kansas City's prestigious Plaza Club. He is a professional speaker who has provided over one thousand presentations on the topics of cybercrime, leadership, crisis communication, ethics, identity theft, body language and more. His clients include 20th Century Fox Entertainment, UBS, Merrill Lynch, Morgan Stanley, Nationwide, Citigroup, The Young Presidents Organization, American Century, Hallmark, H & R Block, Hess Oil, Standard and Poor's, Financial Executives International, U.S. Bank, Wells Fargo and others. He developed and presented a program on identity theft prevention which was used to educate a nationwide audience of Citigroup employees. His program on the topic of leadership integrity has been certified for education credits across the United States. Jeff was a headline keynote presenter at an international cyber security conference in Dubai in 2022.

Jeff was head of operations security for the Kansas City FBI and a graduate of the world-renowned John E. Reid School of Interviewing and Interrogation. He is a certified FBI instructor and has trained numerous government agencies and corporate clients on how to interpret and project body language for more effective interpersonal communication.

In addition to his latest book on the topic of cyber security, Jeff authored speeches for FBI executives and has been published in The Kansas City Star, Ingram's Magazine and on the FBI National Web site.

Jeff consulted for academy award winning director Ang Lee during the production of "Ride with the Devil", and he has provided regular consulting services for television and movie production in Hollywood at Steele Films and Granfalloon Productions. Jeff was a major contributor and appeared on camera in a recent episode of The History Channel's, "America's Book of Secrets". He was featured in the companion documentary to the major theatrical release "Runner -Runner", which stars Ben Affleck and Justin Timberlake. Jeff has been featured in television commercials on the topic of fraud prevention.

Jeff was recruited by the FBI from Xerox Corporation, where he was a Computer Systems Analyst. He has an undergraduate degree in Criminal Justice from the University of New Haven (Connecticut) and a Masters Degree in Business Administration from the University of Texas.

**816-853-3929**

**E-mail: [jefflanza@thelanzagroup.com](mailto:jefflanza@thelanzagroup.com)**

**Website: [www.thelanzagroup.com](http://www.thelanzagroup.com)**



# Special Guests



**BRAD BARNETT | Associate Vice President for Access and Enrollment Management/Director of Financial Aid & Scholarships | James Madison University**

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Brad Barnett is an Accredited Financial Counselor, Certified Personal Financial Manager, and Certified Financial Aid Administrator who works as the Associate Vice President for Access and Enrollment Management/Director of Financial Aid & Scholarships at James Madison University. Closing in on three decades of experience in the financial aid profession, Brad has been active in state, regional, and national financial aid associations as a presenter, committee member/chair, and elected officer.

A past president of VASFAA and SASFAA, he has also served NASFAA on the Board of Directors, Financial Affairs Committee, as Treasurer, as Conference Chair, as a Standards of Excellence (SOE) Reviewer, and as a SOE Assessment Leader. Brad is also the 2022-23 NASFAA National Chair.

Brad received the VASFAA Excellence Award, VASFAA Life Membership Award, SASFAA Distinguished Service Award, NASFAA Regional Leadership Award, and NASFAA Allan W. Purdy Distinguished Service Award. In addition to these activities, he teaches personal finance courses (on-line and in person) at JMU and provides financial counseling services on a professional basis outside of his role with JMU.

Brad and his wife, Sara, have two sons. The oldest graduated from the University of Mary Washington and the youngest graduated from James Madison University. This has given him the unique perspective of going through the “college process” as a parent, as well as an administrator.



**ALEX DELONIS | Associate Dean for Enrollment Management & Director of Financial Aid | Wabash College**

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Alex DeLonis, FAAC, currently serves as the Associate Dean for Enrollment Management & Director of Financial Aid at Wabash College in Crawfordsville Indiana. Before arriving at Wabash, he served as the Director of Financial Aid Processing at Ivy Tech Community College and began his financial aid career at two different community colleges in Illinois. Alex has been active in state, regional, and national financial aid associations for more than 15 years. He currently participates on NASFAA's FAFSA Simplification Working Group and is a NASFAA FAFSA Simplification Community Influencer. He was also a subject matter expert

on the College Cost Transparency Initiative which looks to improve aid offers and is a former participant of NASFAA's Diversity Leadership Program. In addition to being the current Treasurer of NASFAA, Alex currently serves as the President-Elect of ISFAA & the Indiana State Representative on the MASFAA Board.

# Special Guests

Image  
not  
available

## **PAM ENGBRETSON | Director of Financial Aid and Scholarships | Century College**

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Having more than 35 years of financial aid experience in Minnesota public colleges, I am excited to represent the Minnesota Association of Financial Aid Administrators and join our Missouri colleagues for their conference. I began my career as the loan certifying specialist forever ago and eventually became the financial aid director. I have worked in the two public MN higher education systems serving students and adapting to change. Changes in our world are constant and I have seen many financial aid changes over my years, but the FAFSA Simplification will be, by far, the most sweeping changes we have seen. I love that we get to support the educational and career dreams of our students, support the staff who help finance those dreams and have state, regional and national organizations who support the work that we do. On a personal level, I farm with my spouse, live in rural Minnesota, have two adult children and love being a grandparent.



## **MEG KREJCI | Wellness Consultant for Mindfulness & MBSR**

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Meg comes from a background in Accounting, Management Information Systems, and International Business. As a result of life challenges and related stress, she sought out training in mindfulness through Jon Kabat-Zinn's Mindfulness-Based Stress Reduction program at the Center for Mindfulness – UMass Medical School. Inspired by her experience, Meg founded and directed Masterpeace Studios; a nonprofit organization servicing the St. Louis and Midwest region teaching skills of mindfulness for health and well-being. For the last 25 years, Meg has been guiding individuals of all ages in stress reduction strategies in numerous sectors including education, healthcare, and corporate. In 2016, Meg joined

Washington University in St. Louis as a Mindfulness Consultant. There she offers the Move into Mindfulness program which is modeled on this evidenced-based curriculum. Meg is passionate about sharing the benefits of practicing mindfulness to help individuals and teams reduce stress and anxiety, improve health and mental well-being, and achieve greater adaptability and appreciation in life.



## **CHAD OLSON | Director of Student Financial Aid | Iowa State University**

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Chad Olson is the Director of Student Financial Aid in the Office of Student Financial Aid at Iowa State University. Chad has worked in the financial aid profession at Iowa State for 21 years. He has served both MASFAA and IASFAA as president and has been on many committees in both organizations. Chad is proud to currently serve both MASFAA and IASFAA as Site Committee Co-Chair.

Chad lives in Gilbert, IA, with his wife Emily, and his 13 year old boy/girl twins. His 23 year old son works in Admissions at the University of Iowa.



# Special Guests



**EMILY OLSON | Assistant Director of Student Services | Iowa State University**

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Emily is an Assistant Director of Student Services in the College of Liberal Arts and Sciences at Iowa State University. Emily has worked in academic advising for 18 years. As a low-income, first-generation student she recognizes the challenges that face many of our students and is committed to supporting students as they navigate their way through high education. Her goal is to always have students leave her office feeling better than when they came in, or at least better understanding their situation and knowing someone believes in them and is there to help. While persevering and enduring the process to have her student loans forgiven through PSLF, her proudest financial aid moment was beating her husband, at the time the Past-President of MASFAA, in MASFAA trivia. Emily lives in Gilbert, IA with her husband Chad, 13 year old twins Catherine and Carter, and their dogs April and Cooper. Her 23 year-old step-son Connor lives in Iowa City and works in recruitment at the University of Iowa.



**CRAIG SLAUGHTER | Director of Financial Aid | Kenyon College**

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Craig Alan Slaughter, Kenyon College – In 2017, Craig Slaughter returned to Kenyon College in Gambier, Ohio to serve as Director of Financial Aid. He previously worked for Kenyon as an Associate Director from 2000 to 2005. During the intervening years, Craig served as Director of Financial Aid for the University of Redlands, in southern California, and also in the same role at DePauw University in central Indiana. Craig is Past-President of the Midwest Association of Student Financial Aid Administrators and is a previous MASFAA Vice President and Secretary. He holds the FAAC® (Financial Aid Administrator, Certified) Designation and has held various volunteer and presenter roles with the College Board, ISFAA, WASFAA (the Western regional association) and the National Association - including serving on the NASFAA Board of Directors as a Rep at Large, the 2018-2020 Diversity Officer and chair for the CFAA Commission. Craig received a Bachelor of Music degree from the Eastman School of Music and a Master of Science in Higher Education Administration from Indiana University. In his free time, Craig enjoys rehearsing and performing in the tenor section with symphony choruses. One particular highlight was being part of the choir that performed with Madonna in the 2012 Superbowl halftime show at Lucas Oil Stadium in Indianapolis. A truly memorable experience!



Agenda at a

glance



## Monday

8:30 – 9 a.m.	Newcomer Registration Open (Lobby)
9 a.m. – noon	Exhibitor Set Up (Granada)
9 a.m. – noon	MASFAP Board Meeting (Seachase)
9 – 10:30 a.m.	Newcomer Breakfast with Board (Marbella A)
10:30 a.m. – 12:30 p.m.	Newcomer Orientation (Marbella B)
Noon – 4 p.m.	Registration Open (Granada Foyer)
12 p.m. – 4:30 p.m.	Exhibit Area Open (Granada)
12:30 p.m.	Boxed Lunches Available (Granada Foyer)
1 – 1:50 p.m.	Leadership Integrity (Marbella B)
1 – 2:30 p.m.	NASFAA Credentialing – Verification (Theater)
1 – 2:30 p.m.	NASFAA Credentialing – R2T4 (Valencia)
2 – 3:15 p.m.	Directors’ Roundtable (Seachase)
2:30 – 3 p.m.	Break (Granada)
3 – 4:30 p.m.	NASFAA Credentialing – Verification (Theater)
3 – 4:30 p.m.	NASFAA Credentialing – R2T4 (Valencia)
3:30 – 4:30 p.m.	Simple Safeguards: How to Stay Safe from Cybercrime and Identify Theft (Marbella B)
4:30 – 5:30 p.m.	Associate Member Mixer with Board (President’s Suite)
5:30 – 7:30 p.m.	Dinner, President’s Welcome, Charity Introduction, and Keynote Speaker (Granada)
7:45 p.m.	Casino and Game Night (Marbella)

# Tuesday

6:30 – 7:30 a.m.	Walking Group (Meet in Lobby)				
7:30 – 8:30 a.m.	Breakfast (Granada)				
7:30 a.m. – Noon	Registration Open (Granada Foyer)				
7:30 a.m. – 4:30 p.m.	Exhibit Hall Open (Granada)				
8:30 – 9:30 a.m.	General Session 1 – Preparing for FAFSA Simplification on Your Campus (Granada)				
9:40 – 10:40 a.m.	A Taste of Mindfulness (Valencia)	Professional Judgments (Seachase)	SAI and Tuition Promise (HK's Club Room)	Return to Repayment (Marbella A)	Hungry to Learn Part 1 (Theater)
10:40 – 11:15 a.m.	Break (Granada)				
11:15 – 12:15 p.m.	College Cost Transparency Initiative (Valencia)	Calculating Pell Grant Awards (Seachase)	Building a Hybrid Workplace (HK's Club Room)	Student Centered. Student Success (Marbella A)	Hungry to Learn Part 2 (Theater)
12:15 – 1:20 p.m.	Lunch, MASFAA Updates, State Exchange & Business Meeting (Granada)				
1:30 – 2:30 p.m.	General Session 2 – FAFSA Simplification: More Than Just SAI! (Granada)				
2:30 – 3:00 p.m.	Break (Granada A/B/C)				
3:00 – 4:00 p.m.	Connecting with Gen Z: Effective Communication Strategies for Financial Aid Professionals (Valencia)	Scholarship Provider Panel (Seachase)	Leadership Development Program: MASFAP Is Creating Agents of Change (HK's Club Room)	My Hat Rack is Full: How to Prioritize Compliance at a Small School (Marbella A)	Cost of Attendance (Theater)
4:15 – 5:00 p.m.	Birds of a Feather-Community College (Valencia)	Birds of a Feather-Tech/Trade (Seachase)	Birds of a Feather-4 Year Private (HK's Club Room)	Birds of a Feather-4 Year Public (Marbella A)	Birds of a Feather-Associate Members (Granada)
5:00 – 6:00p.m.	Current and Incoming Board Mixer (President Suite)				
6:00 – 7:30 p.m.	Dinner, Awards & Special Recognition (Granada)				
7:45 p.m.	Talent Show and closing of Silent Auction (Thirst)				

# Wednesday

6:30 – 7:30 a.m.	Walking Group (Meet in Lobby)
7:30 – 8:30 a.m.	Quick Start Breakfast (Granada)
8:45 – 9:45 a.m.	NASFAA Update (Granada)
10:00 – noon	Brunch, State Update, Scholarship Drawing, Passing of Gavel (Marbella)



# Monday

8:30 a.m. – 9:00 a.m.	<b>NEWCOMER REGISTRATION</b>	Lobby
9:00 a.m. – 12 Noon	<b>EXHIBITOR SETUP</b>	Granada
9:00 a.m. – 12 Noon	<b>MASFAP BOARD MEETING</b>	Seachase
9:00 a.m. – 10:30 a.m.	<b>NEWCOMER BREAKFAST AND PRESENTATION</b>	Marbella A
10:30 a.m. – 12:30 p.m.	<b>NEWCOMER ORIENTATION</b>	Marbella B
12 Noon – 4:00 p.m.	<b>REGISTRATION OPEN</b>	Granada Foyer
12 Noon – 4:30 p.m.	<b>EXHIBIT HALL OPEN</b>	Granada
12:30 p.m.	<b>BOXED LUNCHES AVAILABLE</b>	Granada Foyer
1:00 p.m. – 1:50 p.m.	<b>Leadership Integrity</b> Presenter: Jeff Lanza – Retired FBI Agent      Moderator: Kaley Williams Description: Jeff Lanza draws on his years of experience in investigating white collar crime to create an engaging and informative presentation on why people step over the line. Moreover, it is about the role of leadership and what leaders can do to ensure these factors don't affect them or the people they lead. Real FBI case examples help the audience understand the root causes of unethical behavior and to help them facilitate the achievement of goals with morality and integrity intact.	<b>Marbella B</b>
1:00 p.m. – 2:30 p.m.	<b>NASFAA Credentialing: Verification (Part 1)</b> Presenter: Charles (Buddy) Mayfield – Director of Financial Assistance (Northwest Missouri State University) Description: Must attend both parts of the instruction portion. Attendees will receive a voucher for the NASFAA exam. Voucher must be redeemed within 45 days of the conference.	<b>Theater</b>
1:00 p.m. – 2:30 p.m.	<b>NASFAA Credentialing: R2T4 (Part 1)</b> Presenter: Cassandra Hicks – Director of Financial Aid (Southeast College of Nursing and Health Sciences) Description: Must attend both parts of the instruction portion. Attendees will receive a voucher for the NASFAA exam. Voucher must be redeemed within 45 days of the conference.	<b>Valencia</b>
2:00 p.m. – 3:15 p.m.	<b>Directors' Roundtable</b>	<b>Seachase</b>
2:30 p.m. – 3:00 p.m.	<b>BREAK/EXHIBIT HALL OPEN</b>	Granada
3:00 p.m. – 4:30 p.m.	<b>NASFAA Credentialing: Verification (Part 2)</b> Presenter: Charles (Buddy) Mayfield – Director of Financial Assistance (Northwest Missouri State University) Description: Must attend both parts of the instruction portion. Attendees will receive a voucher for the NASFAA exam. Voucher must be redeemed within 45 days of the conference.	<b>Theater</b>

# Monday

3:00 p.m. – 4:30 p.m.	<b>NASFAA Credentialing: R2T4 (Part 2)</b> Presenter: Cassandra Hicks – Director of Financial Aid (Southeast College of Nursing and Health Sciences) Description: Must attend both parts of the instruction portion. Attendees will receive a voucher for the NASFAA exam. Voucher must be redeemed within 45 days of the conference.	<i>Valencia</i>
3:30 p.m. – 4:30 p.m.	<b>Simple Safeguards: How to Stay Safe from Cybercrime and Identify Theft</b> Presenter: Jeff Lanza – Retired FBI Agent Description: Jeff informs, inspires and entertains in this timely and pertinent presentation. It focuses on how criminals try to trick us, steal our identities and commit cyber fraud. He demonstrates the simple steps we can employ to keep our identities safe and stay protected from the plethora of cyber scams and frauds that pervade our society. Jeff provides easy to implement solutions to real world cyber risks - what to watch for and where not to click.	<i>Marbella B</i> Moderator: Dan Garrity
4:30 p.m. – 5:30 p.m.	<b>ASSOCIATE MEMBER MIXER</b>	President's Suite
5:30 p.m. – 7:30 p.m.	<b>DINNER, PRESIDENT'S WELCOME, CHARITY INTRODUCTION AND KEYNOTE</b>	Granada
7:45 p.m.	<b>CASINO AND GAME NIGHT</b>	Marbella



# Tuesday

- 6:30 a.m. – 7:30 a.m. **WALKING GROUP** ..... Lobby
- 7:30 a.m. – 12 Noon **REGISTRATION OPEN** ..... Granada Foyer
- 7:30 a.m. – 4:30 p.m. **EXHIBIT HALL OPEN** ..... Granada
- 7:30 a.m. – 8:30 a.m. **BREAKFAST** ..... Granada
- 8:30 a.m. – 9:30 a.m. **General Session: Preparing for FAFSA Simplification on Your Campus** *Granada*  
Presenter: Alex DeLonis – Director of Financial Aid (Wabash College)  
Moderator: Matthew Kearney  
Description: 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 2024-25. We will see how one school used NASFAA's SAI 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. We will also highlight what schools are doing to navigate the delayed FAFSA release.
- 9:40 a.m. – 10:40 a.m. **A Taste of Mindfulness** *Valencia*  
Presenter: Meg Krejci – Employee Wellness Consultant (Washington University in St. Louis)  
Moderator: Kevin McNamara  
Description: An introduction to mindfulness concepts, a personal experience of practice, tools to help reduce fatigue and burnout, respond vs react in the heat of the moment, tips for difficult conversations, ideas for a welcoming and stress free office for you and your students. Compassionate breathing.
- 9:40 a.m. – 10:40 a.m. **Professional Judgment Panel Discussion** *Seachase*  
Presenter: Becca Diskin – Director of Financial Aid (Missouri Southern State University)  
Tony Lubbers – Director of Student Financial Assistance (University of Central Missouri)  
Dena Norris – Associate Vice Chancellor of Student Financial Services (Metropolitan Community College) Moderator: Dena Norris  
Description: With the upcoming Better FAFSA changes, new guidance has been issued for Professional Judgment, now referred to as Special Circumstances and Unusual Circumstances. This panel will discuss these changes, and what FAAs can do to address issues with student FAFSA applications. We look forward to hearing your thoughts and concerns as we navigate this new change.
- 9:40 a.m. – 10:40 a.m. **SAI and Tuition Promise** *HK's Club Room*  
Presenter: Charles (Buddy) Mayfield – Director of Financial Assistance (Northwest Missouri State University) Moderator: Laura Schultz  
Description: What impact does SAI have on other need-based aid programs? Attend this session to hear how one school evaluated the potential impact on their promise program, a program covering any remaining gap in tuition/fees after federal, state, and certain institutional grant aid. What if the program becomes too expensive? What if family finances have not changed, but a student is no longer eligible? Learn what adjustments they already made for 2023-24 and what adjustments they plan to make for 2024-25.



# Tuesday

- 9:40 a.m. – 10:40 a.m. **Return to Repayment** *Marbella A*  
Presenter: Will Shaffner – Director of Business Development and Government Relations (MOHELA) Moderator: Heather Gaumer  
Description: You can't afford to miss this discussion on how you, your office, and your role on campus is more crucial now than ever in supporting students and graduates. We will discuss the current environment surrounding loan payment and repayment, as well as your critical role in this process. Join your colleagues to determine if you, your office/campus are prepared, to support our students and borrowers in maneuvering the payment of their Public and Private education loans.
- 9:40 a.m. – 10:40 a.m. **Hungry to Learn (Part 1)** *Theater*  
Presenter: Taylor Grimm – Program Manager (Missouri Scholarship & Loan Foundation) Jessica Tabbert – Financial Aid Advisor (North Central Missouri College) Moderator: Ron Hancock  
Description: Join us for an exclusive screening of Hungry to Learn, a documentary about the devastating hunger crisis unfolding on college campuses – addressing what we can, and should, be doing about it. Following the film, we will engage in a group discussion and provide an opportunity to share personal experiences and learn from colleagues about best practices for supporting students facing food and housing insecurities.
- 10:40 a.m. – 11:15 a.m. **BREAK** .....Granada
- 11:15 a.m. – 12:15 p.m. **College Cost Transparency Initiative** *Valencia*  
Presenter: Alex DeLonis – Director of Financial Aid (Wabash College) Moderator: Craig Poleman  
Description: The goal of the CCTI is to improve the clarity, accuracy, and consistency of student financial aid offers by producing a set of guiding principles and minimal standards to be used when developing aid offers. This will ultimately ensure students can easily understand how much postsecondary education will cost and make it easier to compare aid offers from various schools. Attend this session to get an update on the progress and learn what you can do to help.
- 11:15 a.m. – 12:15 p.m. **Calculating Pell Grant Awards** *Seachase*  
Presenters: Bridgette Betz – Director, Student Financial Assistance (Missouri S&T) Kimberly Meeker – Director of Financial Aid (North Central Missouri College) Dan Dick – Manager of Compliance and Awarding (Washington University in St. Louis) Moderator: Julie Finn  
Description: This session will discuss the transition from EFC to SAI, and from time status to enrollment intensity. With the changes to how Pell awards are calculated, we will discuss how schools will be interpreting the current guidance on how students will earn Pell in 2024-2025. Be prepared to discuss and complete hand calculations!

# Tuesday

11:15 a.m. – 12:15 p.m. **Building a Hybrid Work Place**

**HK's Club Room**

Presenters: Chad Olson – Director of Student Financial Aid (Iowa State University)  
Emily Olson – Assistant Director of Student Services (Iowa State University)  
Moderator: Rob Smith

Description: Building a functional hybrid team can look very different, even at the same institution! Emily Olson, Assistant Director of Student Services, Iowa State University, and Chad Olson, Director of Student Financial Aid, Iowa State University, will share their experiences with hybrid team building. Despite working at the same institution, they have very different processes and policies in place, which illustrates the many ways to make your hybrid workplace a success!

11:15 a.m. – 12:15 p.m. **Student Centered. Student Success**

**Marbella A**

Presenters: Daniel Gutierrez – Associate Vice Chancellor for Student Affairs (Ozarks Technical Community College)  
Jordan Schreiber – College Director of Student Success (Ozarks Technical Community College)  
Kim Cary – College Director for Financial Aid (Ozarks Technical Community College)  
Moderator: Stephen Garman

Description: In 2022, Ozarks Technical Community College turned the traditional student advising model inside out. From start to finish, each student now has their personal one-stop shop – a highly-skilled advocate whose job goes far, far beyond academic advising. Are students better off? What was the impact on staffing? On morale? What could this mean for retention? Hear from OTC administrators who were central to the transition and understand how the Student Success model could lift up your school.

11:15 a.m. – 12:15 p.m. **Hungry to Learn (Part 2)**

**Theater**

Presenter: Taylor Grimm – Program Manager (Missouri Scholarship & Loan Foundation)  
Jessica Tabbert – Financial Aid Advisor (North Central Missouri College)  
Moderator: Cherelle Washington

Description: Join us for the conclusion of the screening of Hungry to Learn, a documentary about the devastating hunger crisis unfolding on college campuses – addressing what we can, and should, be doing about it. Following the film, we will engage in a group discussion and provide an opportunity to share personal experiences and learn from colleagues about best practices for supporting students facing food and housing insecurities.

12:15p.m. – 1:20 p.m. **LUNCH, MASFAA EXCHANGE, BUSINESS MEETING** .....Granada

Presenter: Tony Lubbers, MASFAP President

# Tuesday

- 1:30 p.m. – 2:30 p.m. **General Session: FAFSA Simplification: More Than Just SAI!** *Granada*
- Presenters: Chad Olson – Director of Student Financial Aid (Iowa State University)  
Keri Gilbert – Director of Financial Aid (Stephens College)  
Amy Hager – Director of Financial Aid (Moberly Area Community College)  
Moderator: Charles (Buddy) Mayfield
- Description: There's a lot more to FAFSA Simplification than the changes to the FAFSA form and the conversion from EFC to SAI! Three financial aid professionals will lead you through an interactive discussion regarding other regulatory changes from the Consolidated Appropriations Act, 2021. It's a whole new world for our profession, and this session will help you navigate the changes!
- 2:30 p.m. – 3:00 p.m. **BREAK** *Granada*
- 3:00 p.m. – 4:00 p.m. **Connecting with Gen Z: Effective Communication Strategies for Financial Aid Professionals**
- Presenter: Candice Shea – Assistant Director of Financial Aid (Columbia College) *Valencia*  
Moderator: Sara Edwards
- Description: Financial Aid Professionals are tasked with a unique challenge - effectively communicating complex information about financial aid to Generation Z. Born after 1997, Gen Z has distinct characteristics, preferences, and behaviors that require a tailored approach. Join us as we explore the world of Gen Z, exploring their preferences and expectations when it comes to communication. We will emphasize the need for authenticity, personalization, and a mobile-first approach in our interactions.
- 3:00 p.m. – 4:00 p.m. **Scholarship Provider Panel** *Seachase*
- Moderator: Kaitlyn Venta
- Description: Join this session for learning and dialogue with Missouri scholarship providers. Hear about scholarship opportunities your students may be eligible for and trends that scholarship providers are seeing in applicants. There will also be time for discussion with scholarship providers about how we can work together to make college more affordable for students.
- 3:00 p.m. – 4:00 p.m. **Leadership Development Program: MASFAP is Creating Agents of Change** *HK's Club Room*
- Presenters: Susan Fisher – Analyst (Columbia College), Ethan Miller – Student Financial Services Coordinator (Southeast Missouri State University), Cynthia Travis – Sr Assistant Director of Strategic Outreach and Initiatives (University of Missouri - Columbia), Beth Walker – Adult Education Coordinator/Financial Aid Administrator (Saline County Career Center), Kaley Williams – Associate Director of Student Financial Aid (Kansas City University), and Justin Womack – Financial Aid Coordinator (University of Central Missouri)
- Moderator: Amy Hager
- Description: MASFAP is committed to building, supporting, and empowering leaders and agents of change for the future of the organization. Join us to learn more about MASFAP's Leadership Development Program and gain a better understanding about what MASFAP is doing to prepare leaders and agents of change for the future. The six participants from the Class of 2023 will share their perspectives and experiences from the past year (and hopefully encourage others to consider joining the program in the future).



# Tuesday

- 3:00 p.m. – 4:00 p.m. **My Hat Rack is Full: How to Prioritize Compliance at a Small School** *Marbella A*  
Presenters: Alex DeLonis – Director of Financial Aid (Wabash College)  
Keri Gilbert – Director of Financial Aid (Stephens College)  
Moderator: Taylor Grimm  
Description: While all financial aid directors wear many hats, those at small schools are often tasked with processing financial aid, fielding office e-mails, and being their own systems expert. Without dedicated compliance staff, these directors must make time to ensure a compliant office. With so much to do, how does a director prioritize and create an office culture of compliance? Hear from two directors of small schools on how they keep current with compliance when they have so many hats to wear.
- 3:00 p.m. – 4:00 p.m. **Cost of Attendance** *Theater*  
Presenters: Sarah Williamson – Associate Director of Financial Aid (North Central Missouri College)  
Melissa Harper – Assistant Director of Operations (Southeast Missouri State University)  
Colleen Brown – Director of Financial Aid (Columbia College)  
Moderator: Melissa Findley  
Description: Effective with the 2023-24 award year, rules and guidance related to cost of attendance (COA) change in significant ways. The FAFSA Simplification Act, which was enacted into law as part of the Consolidated Appropriations Act, 2021 gives the U.S. Department of Education the authority to regulate COA, starting in the 2024-25 award year. This discussion will focus on how three schools have approached COA changes related to realistic budgets, disclosure of COA elements, living expenses, and meals.
- 4:15 p.m. – 5:00 p.m. **Birds of a Feather – Community College** *Valencia*  
Moderator: Angel Mefford  
Description: Spend this session with your colleagues who are also working at Community Colleges across Missouri discussing hot topics, networking, and sharing ideas. Make sure to bring your business cards to share contact information.
- 4:15 p.m. – 5:00 p.m. **Birds of a Feather – Tech/Trade** *Seachase*  
Moderator: Anna Plattner  
Description: Spend this session with your colleagues who are also working at Technical and Trade Schools across Missouri discussing hot topics, networking, and sharing ideas. Make sure to bring your business cards to share contact information.
- 4:15 p.m. – 5:00 p.m. **Birds of a Feather – 4-Year Private** *HK's Club Room*  
Moderator: Jennifer Wright  
Description: Spend this session with your colleagues who are also working at 4-Year Private Institutions across Missouri discussing hot topics, networking, and sharing ideas. Make sure to bring your business cards to share contact information.
- 4:15 p.m. – 5:00 p.m. **Birds of a Feather – 4-Year Public** *Marbella A*  
Moderator: Emily Haynam  
Description: Spend this session with your colleagues who are also working at 4-Year Public Institutions across Missouri discussing hot topics, networking, and sharing ideas. Make sure to bring your business cards to share contact information.

# Tuesday

4:15 p.m. – 5:00 p.m.	<b>Birds of a Feather – Associate Members</b>	<i>Granada</i>
	Moderator: Julie Finn	
	Description: Spend this session with your colleagues who are also serving as Associate Members across Missouri discussing hot topics, networking, and sharing ideas. Make sure to bring your business cards to share contact information.	
5:00 p.m. – 6:00 p.m.	<b>CURRENT AND INCOMING BOARD MIXER</b>	President's Suite
6:00 p.m. – 7:30 p.m.	<b>DINNER, AWARDS &amp; SPECIAL RECOGNITION</b>	Granada
7:45 p.m.	<b>MASFAP TALENT SHOW AND CLOSING OF SILENT AUCTION</b>	Thirst



# Wednesday

6:30 a.m. – 7:30 a.m.	<b>WALKING GROUP</b> .....	Lobby
7:30 a.m. – 8:30 a.m.	<b>QUICK START BREAKFAST</b> .....	Granada
8:45 a.m. – 9:45 a.m.	<b>NASFAA UPDATE</b> Presenter: Brad Barnett – 2022-23 NASFAA National Chair; Associate Vice President for Access and Enrollment Management/Director of Financial Aid & Scholarships (James Madison University) Moderator: Will Shaffner	Granada
10:00 a.m. – 12 noon	<b>BRUNCH, STATE UPDATE, SCHOLARSHIP DRAWING, AND PASSING OF THE GAVEL</b> .....	Marbella
	Moderator: Erik Anderson	







# Thank you

**FOR ATTENDING THE 2023 MASFAP  
CONFERENCE!**

The Program Committee hopes you were able to gain some valuable life knowledge to take back to your office. We hope that you have been able to network, expand your knowledge on topics, and enjoyed our time back together.

*We will see you  
again next year!*

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. At the top center, there is a small black circle, possibly representing a hole punch or a decorative element. The overall appearance is that of a clean, unused piece of stationery.





THE LODGE OF  
FOUR SEASONS

## PROPERTY MAP





AGENTS  
of CHANGE

NOVEMBER 6-8, 2023

MASTAP



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