

COSUAA Annual Conference

Hilton Head, SC
April 25 - 28, 2015

The Future of Financial Aid Offices: Inside and Out

Conference Program

Saturday, April 25

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| 2:30 – 4:00 pm | Steering Committee Meeting | Room 376 |
| 4:00 – 6:00 pm | Registration | Outside Sabal Palm Room |
| 6:00 – 8:00 pm | Welcome Reception Kay Lewis University of Washington, 2013-15 COSUAA Chair Enjoy a pre-conference visit with your fellow conferees. Your guests are welcome. This is an especially good opportunity for first-time conference participants to meet others and feel at home at COSUAA. | Bullhead Deck |

Sunday, April 26

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| 7:30 – 8:30 am | Continental Breakfast | Sabal Palm Room |
| 7:30 – 8:30 am | Registration | Outside Sabal Palm Room |
| 8:30 – 9:00 am | Opening Remarks and Introductions Kay Lewis University of Washington, 2013-15 COSUAA Chair | Sabal Palm Room |
| 9:00 – 10:15 am | Session I Federal Update Speaker: Jeff Baker Federal Student Aid Moderator: Kay Lewis University of Washington | Sabal Palm Room |
| 10:15 – 10:30 am | Break | |
| 10:30 – 11:45 am | Session II Open Forum: Best Practices in Managing Office Operations and Processes Moderator: Rachelle Feldman University of California at Berkeley | Sabal Palm Room |
| 11:45 – 1:15 pm | Lunch | Basshead Deck |

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| 1:30 – 2:45 pm | Session III Leading in Challenging and Changing Times | Sabal Palm Room |
| | Speaker: Anne T. Roberts Leadership Within, Inc. | |
| | Moderator: Marie Johnson University of Vermont | |
| 2:45 – 3:00 pm | Break | |
| 3:00 – 4:15 pm | Session IV Strategies for Exploring the Human Side of Change | Sabal Palm Room |
| | Speaker: Ujima Donalson University of Washington | |
| | Moderator: Kay Lewis University of Washington | |
| 5:00 – 6:30 pm | Hospitality Suite | Room 376 |
| Evening | On Your Own | |

Monday, April 27

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| 7:30 – 8:30 am | Continental Breakfast | Sabal Palm Room |
| 8:30 – 9:45 am | Session V Using Infographics to Improve Financial Aid Communications | Sabal Palm Room |
| | Speaker: Kathleen Mabley The University of Texas at Austin | |
| | Moderator: Tom Melecki The University of Texas at Austin | |
| 9:45 – 10:00 am | Break | |
| 10:00 – 11:45 am | Session VI Federal Student Aid: Challenges Now and in the Future | Sabal Palm Room |
| | Speaker: Jeff Appel Deputy Undersecretary of Education | |
| | Moderator: Dan Mann University of Illinois at Urbana-Champaign | |
| 11:45 – 1:15 pm | Lunch and Business Meeting | Ballroom A and B |
| | Kay Lewis University of Washington, 2013-15 COSUAA Chair | |
| 1:15 – 2:30 pm | Session VII Reauthorization: Looking Up the Hill | Sabal Palm Room |
| | Speaker: George Chin American Association of State Colleges and Universities | |

Speaker: Megan McClean
National Association of Student Financial Aid Administrators

Speaker: Jon Fansmith
American Council on Education

Speaker: Kari McCarron
Association of Public and Land-Grant Universities

Moderator: Bonnie C Joerschke
University of Georgia

2:30 – 2:45 pm

Break

2:45 – 4:00 pm

Session VIII

Sabal Palm Room

Open Forum: Best Practices in Ensuring Student and Aid Office Needs are Addressed in Institutional Resource Decisions

Moderator: Julie Poorman
East Carolina University

4:30 – 6:30 pm

Hospitality Suite

Room 376

Evening

Dinner on Your Own

Tuesday, April 28

7:30 – 8:30 am

Breakfast

Conroy's

8:30 – 9:45 am

Session IX

Sabal Palm Room

The Future of Athletic Financial Aid

Speaker: Kris Richardson
National Collegiate Athletic Association

Moderator: Nick Prewett
University of Missouri

9:45 – 10:00 am

Break

10:00 – 11:30 am

Session X

Sabal Palm Room

Is There Really a Student Loan Debt Problem?

Speaker: Beth Akers
Brown Center on Education Policy, Brookings Institution

Moderator: Delisa Falks
Texas A & M University

11:30 am

Closing Remarks

Sabal Palm Room

Roberta Johnson
Iowa State University, 2015-17 COSUAA Chair

Speaker Biographies

Beth Akers, Brown Center on Education Policy, Brookings Institution

Beth Akers is a fellow in the Brookings Institution's [Brown Center on Education Policy](#). She is an expert on the economics of education, with a focus on higher education policy. Dr. Akers' recent writing has been on the topics of student loan debt, information in higher education and extended time-to-degree. She previously held the position of staff economist with the President's Council of Economic Advisors, where she worked on federal student lending policy as well as other education and labor issues.

Dr. Akers received a B.S. in Mathematics and Economics from SUNY Albany and a Ph.D. in Economics from Columbia University. She is often cited by major media outlets and has briefed policy makers on the topic of student loans.

Jeff Appel, Deputy Under Secretary of Education

Jeff Appel is Deputy Under Secretary of Education at the US Department of Education. As Deputy Under Secretary, Jeff oversees postsecondary student aid policy initiatives that align the efforts of Federal Student Aid, the Office of Postsecondary Education, and the Office of Vocational and Adult Education.

Jeff first joined the Department in 2011 as a Senior Policy Advisor for Higher Education and Student Financial Aid in the Office of Planning, Evaluation and Policy Development. From 2007 to 2011, Jeff worked for Congressman George Miller as a Senior Policy Advisor for the U.S. House of Representative's Committee on Education and Labor, where he led numerous student aid and higher education policy efforts that guided legislation for the College Cost Reduction and Access Act, the Ensuring Continued Access to Student Loans Act, the 2008 Higher Education Act reauthorization, the Student Aid and Fiscal Responsibility Act, and the Dodd-Frank Wall Street Reform and Consumer Protection Act.

Prior to working for the House Education and Labor Committee, Jeff was an Assistant Director at the Government Accountability Office's (GAO) Education, Workforce, and Income Security group, responsible for managing much of the GAO's research concerning student aid and other postsecondary education issues. He holds a Bachelor's degree in Business Administration/Finance from the University of Arizona and a Master's degree in Applied Economics from Johns Hopkins University.

Jeff Baker, Federal Student Aid

Jeff Baker has been with the U.S. Department of Education for over 15 years, most recently as Director of Policy Liaison and Implementation for Federal Student Aid, where he advises senior FSA management on policy matters related to the Title IV programs. Jeff served in the student aid profession for more than three decades, beginning his career at the University of Wisconsin at Milwaukee and later spending over 20 years at San Francisco State University. Before that he taught public school in Wisconsin.

Jeff holds a Bachelor's degree from Northeastern University and a Master's degree from the University of Wisconsin, with additional postgraduate work from the University of Southern California.

Jeff holds numerous professional awards including NASFAA's Meritorious Achievement, Regional Leadership, and State Leadership Awards; WASFAA's Creative Leadership and Lifetime Membership Award; CASFAA's Distinguished Service, President's, and Honorary Lifetime Membership Awards; and the College Board's Distinguished Service Award.

George Chin, American Association of State Colleges and Universities

George Chin has, since 2008, served as a Senior Federal Policy Consultant at the American Association of State Colleges and Universities (AASCU) with a primary focus on student financial aid issues.

He served as the University Director for Student Financial Aid at the City University of New York (CUNY) from 1981 until 2008, with programmatic responsibility for the delivery of over \$600 million of assistance to over 110,000 students at the 19 colleges in the CUNY system.

Prior to the service at CUNY, he was a Branch Chief for Institutional Review in the Office of Student Financial Assistance within the New York Regional Office of the U.S. Department of Education. He also worked in financial aid at St. Francis College in Brooklyn, New York and at SUNY at Stony Brook.

George's professional association activities have included service as President of the New York State Financial Aid Administrators Association (NYSFAAA), President of the Eastern Association of Student Financial Aid Administrators (EASFAA), a member of the Board of Directors of the National Association of Student Financial Aid Administrators (NASFAA), and National Chair of the NASFAA Board of Directors. His public service includes ten years, with five years as the Vice Chair, on the Board of Trustees for the New York State Higher Education Services Corporation.

He earned a Bachelor of Science degree in Management Engineering from Rensselaer Polytechnic Institute and a Masters of Education degree in Guidance and Psychological Services from Springfield College.

Ujima Donalson, University of Washington Consulting Alliance

Ujima believes in the unique and tremendous potential for success that lies within all individuals. It is also her belief that successful employees contribute to the overall success of the team. With proper planning the workplace can be a source of empowerment and engagement. She enjoys working with leaders and teams to create workplace environments where people feel connected, committed, and productive.

In order to shift a workplace culture, leaders must remember that atmosphere is a response to leadership influence, a sustained atmosphere produces a climate, and a sustained climate creates a culture. When consulting, she takes a collaborative approach; seeking to partner with clients to develop solutions that will be the most effective for their teams.

Ujima holds a M.Ed. Adult Education and Training and a B.A. Communication Studies: Interpersonal and Organizational Communication. She is certified in project management, high performance training, and professional coaching. Her clients include the University of Washington, Seattle Public Schools, and Bank of America.

Ujima Washington
(206) 616-8461 or alliance@u.washington.edu

Jon Fansmith, American Council on Education

Jonathan S. (Jon) Fansmith represents ACE and its members on matters related to the federal budget and appropriations process, with a particular focus on student aid.

He serves on the Executive Committee of the Committee for Education Funding, a 100-member coalition of national education associations, and coordinates the efforts of the Student Aid Alliance, a coalition of over 80 higher education organizations. Jon also serves on the board of directors of the Foundation for Education Investment and the advisory board of the National Association of Graduate and Professional Students.

Jon earned a BA in history from Georgetown University and an MA in government from The Johns Hopkins University. He held positions in the academic and nonprofit sectors before joining ACE.

Kathleen Mabley: The University of Texas at Austin

Kathleen is the Director of Brand Marketing and Creative Services for The University of Texas at Austin. She is responsible for overseeing strategic marketing and fundraising communications programs to continue to build the brand of the university in order to attract top talent and increase support. She oversees the Creative Services team, which serves as an in-house design agency for the university and provides a wide range of communications services, including communications and brand strategy, graphic design, identity and brand development, Web design and development, copywriting and photography.

Prior to this position, Kathleen worked at the UT Graduate School helping raise the profile of graduate education and graduate students all across campus. Her pre-university years were spent in corporate America with Cars.com, Eli Lilly and Sara Lee Bakery, where, after numerous taste tests, she launched Cheesecake Bites and Slices.

A native of Shaker Heights Ohio, Kathleen is married to fellow McCombs MBA classmate Lou Mabley and lives in Austin, TX. When she isn't cheering on the Longhorns, she can be found on the sidelines of various sporting activities cheering on one of her three sons.

Kari McCarron, Association of Public and Land-Grant Universities

Kari is the Director for Congressional and Governmental Affairs at APLU, where she currently focuses on legislative and regulatory issues surrounding higher education and student financial aid programs.

Prior to joining APLU in 2009, Kari spent several years with the Massachusetts Institute of Technology (MIT) Washington Office as a Senior Legislative Assistant working on education and research issues. She has also worked for the Division of Chemistry at the National Science Foundation (NSF) and for the American Association for the Advancement of Science (AAAS).

Kari earned a MS in Public Policy from the Georgia Institute of Technology, specializing in science and technology policy. She also holds a BA from the University of Michigan in economics and worked as an economist for several years with the U.S. Bureau of Labor Statistics.

Megan McClean, National Association of Student Financial Aid Administrators

Megan is the Managing Director of Policy and Federal Relations at the National Association of Student Financial Aid Administrators (NASFAA) where she oversees the Association's policy and advocacy efforts.

Prior to joining NASFAA in the fall of 2010, she served as the Director of Government Relations for the federal Advisory Committee on Student Financial Assistance, where she contributed to several congressionally mandated reports on the postsecondary access and persistence of low- and moderate-income students.

Megan began her career in higher education as an admissions counselor at Penn State University. She received a master's in higher education at Penn State and BA in political science from Allegheny College.

Kris Richardson, National Collegiate Athletic Association

Kris Richardson is the NCAA's Director of Academic and Membership Affairs. Kris' responsibilities include managing the interpretations area and supporting the work of the NCAA Division I governance structure. He is also responsible for overseeing Academic and Membership Affairs technology initiatives, including applications like NCAA Compliance Assistant and the Legislative Services Database (LSDBi).

Kris presented to COSUAA in 2012, has presented NCAA Division I financial aid information at NASFAA since 2010, and regularly presents at the NCAA Regional Rules Seminars. Kris is a graduate of Capital University who has a master's degree in sport management from The Ohio State University and a juris doctor from The Ohio State University College of Law.

Anne T. Roberts, Leadership Within, Inc.

Successful leaders at every level of organizations tell us there are three balls they cannot afford to take their eye off - managing pace; constantly recalibrating priorities as external pressures put plans to the test, and constantly keeping their finger on the pulse of the amount of change required and what needs to be done about it. Doing 2 of these 3 is not enough to gain a competitive advantage.

Anne is an Organization Development consultant specializing in leadership and change working with her clients on an individual, team and organization basis to create their competitive advantage. She supports her clients in developing practical strategies and in aligning leaders and processes to mobilize people to execute those strategies. Her passion combined with a whole system approach to change, offers customized client solutions that build leadership and change capacity, capability and resilience in client organizations. She supports leaders to actively participate, engage their people and lead their business and projects to results. Leaders tap into their own creativity, drive and energy to deliver results in their organizations using Anne's masterful design, facilitation and coaching skills.

Anne studied Behavioral Science at NTL Institute – School of Behavioral Science; has an Honors BSc and is certified in a variety of tools and assessments that support her work.

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