

College Access & Student Support Track

Managing Up, Down, and Across: The Life of a Middle Manager

Presenters: Jennifer Bell, Associate Director for Financial Aid, University of Oregon
Carlos Villarroel, Associate Director for Financial Aid Portland Community College

Description: Middle management can be tough! This session will explore tips and tricks for striking the careful balance that is required to manage up, down, and laterally, without getting squeezed in the process. This session is for current middle managers, or anyone who has a supervisor and also supervises others, as well as those who aspire to it.

Individual Development Accounts – An Old and New Way to Pay for an Education or Asset

Presenter: Frank Boothby, Program Manager, Project Youth+

Description: The Oregon IDA Initiative invests in the personal and financial growth of individuals to build strong communities throughout Oregon. The Initiative was created in 1999 by the Oregon State Legislature to bring state agencies, private non-profit and tribal partners, and private contributors together to create opportunity in Oregon.

Oregonians with lower incomes enroll through one of the many partners located in all corners of the state, set a goal and begin saving. Once the saver's goal is reached and all parts of the savings plan are completed, every dollar saved by a saver is matched by the program, typically \$5 for every \$1 saved.

Oregon residents twelve years of age and older who have low incomes and modest net worth may be eligible for the program. Residents work with a local partner to define and reach their goals. These dollars can be used for a variety of assets to include education, vehicles, home purchase or repair and assistance with opening a small business.

The Initiative's success depends on its many supporters and partners. Donors, public agencies and leaders, non-profit and tribal partners, financial institutions, community networks, and capable and motivated participants all have a crucial role to play.

Myth, Busted: Students Don't Read Their Emails

Presenter: Sarah Everitt, Director of Financial Aid Operations, Gonzaga University;
WASFAA President

Description: A common complaint among Financial Aid Staff is that students don't read the emails we send them. The session will combat the myth that students don't read, nor care about the communication from the financial aid office. The presenter will share how they improved and evolved communication efforts from their FAO, including how to write more inclusive emails, provide information free of barriers, and leverage different mediums to get students to comply with requests.

The session is rich with personal learnings and practical lessons in our journeys to create more effective communication plans. The presentation will include before and after examples of edited emails, share practical, mostly free tools that can be widely used, and invite participants to share their own best practices for improving the way we all communicate with students.

Implicit Bias: from Awareness to Action

Presenter: Greg Kerr, Committee Member, WASFAA (IDEEA: Inclusion, Diversity, Ethnic, Equity Action committee)

Description: In a safe and collaborative session, we will explore how implicit biases operate as shortcuts to understanding. This session discusses how implicit biases can create barriers to understanding, have a chilling effect on cross cultural relationships and support existing power structures, and we will examine its impact on our daily lives. We will also explore ways to identify and dismantle our own biases and examine ways to carry this work into our workplaces.

Financial Aid for DACA and Undocumented Students - ORSAA

Presenters: Kyra King and Anne Shearer, State Grant Administrators, OSAC – Office of Student Access and Completion

Description: Join professionals from the state as we delve into in-depth issues to help you support undocumented students in navigating the financial aid process. Learn tips, resources, and special considerations related to: filing the ORSAA, filing the FAFSA for mixed status families, applying for private scholarships (including OSAC and beyond), institutional aid, and more. Bring your tough questions! Connect with other professionals in the field who are committed to serving this population.

How Western Oregon University Transitioned to a 100% Virtual Financial Aid Office

Presenters: Kella Helyer, Director of Financial Aid, Western Oregon University
Wendy Papkoff, Sr. Account Executive, CampusLogic

Description: Transitioning from the traditional paper-based financial aid verification and scholarship management processes to a 100% virtual anytime, anywhere environment may seem daunting, but it doesn't have to be. By using automation and technology learn how WOU create a guided, mobile-friendly environment that enables students to load critical documents, complete required verification tasks, e-sign forms, apply for both internal and external scholarships and receive personalized experience 24/7. Learn how we enroll, engage and retain more students during the pandemic.

3 Learning Objectives:

- Relieve your staff of repetitive, manual processes
- Create a digital, mobile system that keeps your team and students engaged and efficient
- Reduce paper, time, and money wasted on confusing and outdated financial aid process

Why the Higher Ed Funnel is More of a Colander

Presenters: Kella Helyer, Director of Financial Aid, Western Oregon University
Wendy Papkoff, Sr. Account Executive, CampusLogic
Vince Vaugh, Client Executive, CampusLogic

Description: Recruiting students is expensive. Between \$1.5 and \$2 billion goes into higher ed's marketing effort to attract qualified students every year. But this expense is being wasted: The financial aid journey is so complex it filters out those qualified candidates before they can even set foot on your campus. Or in many cases, before they learn anything but the sticker price. In this session we will discuss the most common reasons schools are losing students during the financial aid and enrollment journeys and how to combat them – turning the colander back into a streamlined funnel.

3 Learning Objectives:

- Financial friction is the #1 barrier of students enrolling and earning a degree - learn the data behind this statistic – why many students do not enroll and retain in higher education
- Examine how the financial aid and enrollment processes leave first-generation and low-income students behind
- Find ways to plug the holes in the processes to get more students through your doors and to graduation

Serving Hispanic and Latine Students in Oregon with Mindfulness: ¡Juntos logramos éxito!

Presenters: Anel Venegas Trujillo, Scholarship/Financial Aid Counselor, Western Oregon University
Hallie Price-Asadare, Scholarship Advisor, Oregon State University

Description: While the student population of Oregon is ever-changing, financial aid administrators in Oregon continue to be predominately white and monolingual. In this session, we seek to explore the challenges that Latine students in Oregon face and share potential strategies to better serve these students.

Here are some facts from the Oregon Community Foundation (see link below) that illustrate the large population of Latinos in Oregon and why it is critical that institutes of higher education concerned with social justice seek strategies to better reach this demographic:

- Oregon's Latino population is growing at a faster rate than the national rate: 12 percent of the state's population is now Latino, representing 72% growth rate since 2000.
- While more Latino students are graduating, the achievement gap between Latino and white students starts early and persists.
- Median family income for Latino families is more than \$10,000 lower than for white families, and per capita income for Latinos is half the per capita income for white Oregonians, which, by some measures, is less than what is necessary to adequately meet living expenses.

The Road Map for Empowering Students from Historically Marginalized Groups through Financial Wellness Education

Presenters: Dr. Gilbert Rogers, Assistant Director of Financial Wellness, University of Oregon
Jennifer Bell, Associate Director for Advising, University of Oregon

Description: The University of Oregon Financial Wellness Center (FWC) (under the Office of Student Financial Aid and Scholarships) has been innovative and strategic in reaching groups traditionally less likely to receive financial education. Through their efforts, the UO FWC has been able to reach students for whom gaining financial literacy has the highest stakes by creating safe spaces for financial education, investing in relationships, and by building a financial education program centered around inclusion. Join us as we share our journey to create and grow an inclusive campus financial wellness program that acknowledges and honors students' identities and lived experiences. Attendees will gain insight into how the University of Oregon's Office of Student Financial Aid created an inclusive financial wellness education program that has successfully engaged traditionally marginalized groups across campus.

Getting Emotional about Money: The Psychological Impact of Debt and Tools to Help Your Students Cope

Presenter: Ciel Senechal, Head of Campus Development – West Region, College Ave Student Loans

Description: Finance is a loaded topic! Oftentimes we make decisions based on our emotions, rather than what might be best for us financially. There are many reasons for this. Learning your students' "Money Story" and their past experiences with money will help you to better understand how they view their finances and approach money management. In this session, we'll discuss how ideas around money are formed and how to have that discussion with your students. We'll explore why two people may view the same scenario differently and take different actions to approach it. The key is to find a way to talk about money with your students in a way that they understand and feel comfortable.

Join us for a discussion on the varying views of money management, how they're formed and the psychological impact of debt. We will share ways in which to incorporate emotion into your counseling, brainstorm ways to connect students with available campus resources and discuss money management strategies your students can implement during school and beyond graduation.

LGBTQ and FA Alphabet Soup: A Basic Primer on Queer/Trans Identities and Implications for Financial Aid

Presenters: Rylan Wall, Assistant Director, Oregon State University
Layla Solar, Assistant Director, Central Oregon Community College

Description: This session serves as an introduction to learning about LGBTQ+ communities and lived experiences, particularly in a higher education environment. We will cover vocabulary/terminology, misconceptions, and current understandings of sexual orientation and gender. Then we will explore and discuss best practices for supporting queer and trans students, and how this intersects with financial aid administration.

Going the Extra Mile: Outreach Panel

Panel Participants: Nick Dikas, Outreach Counselor, University of Oregon
Jenn Satalino, Director, ECMC, The College Place Oregon

Description: Panelists will share strategies for reaching and supporting first-generation, low-income, rural, and underrepresented student populations. Topics will include reaching students virtually, making an impact despite budget and time constraints, and proven strategies to increase attendance and engagement. This is some of the most impactful work we do, as we help students understand if higher education is financially within reach and give them tools to make informed decisions that will set them up for success. Attendees are encouraged to ask questions and share their challenges and success stories.