



St. Louis Graduates Professional Development Institute

Supporting Student and Family Financial Aid Planning and Decision-Making

Friday, January 29, 2016

Education Plus, 1460 Craig Rd, St. Louis, MO 63146
Leadership Room

AGENDA

8:00 AM Coffee and conversation

8:30 **Welcome/Introductions**

- **Drew Schwartz**, Director of Learning and Career Development, Education Plus
- **Allison Williams**, Senior Vice President, Wyman Center and Co-chair St. Louis Graduates

Shaping Our Day – Collecting Ideas for the Day’s Content

- Where are you starting from?
- Where do you want to go?

8:45-9:15 **Why Financial Aid Literacy Matters**

- The financial aid system – how it works, its impact on low-income students
- Moving from financial aid to financial literacy – a comprehensive approach to financial planning for a postsecondary degree
- Why our work matters – informed decision-making, careful borrowing, debt avoidance

Presenters:

- **Faith Sandler**, Executive Director, The Scholarship Foundation of St. Louis
- **Melissa Findley**, Manager, Foundation and Outreach Strategies, Missouri Scholarship & Loan Foundation

9:15 – 9:45 **Student Perspective: What I Wish I Had Known**

- Moderator: **Teresa Steinkamp**, Advising Director, The Scholarship Foundation of St. Louis

Panelists:

- **LaTzuanna Troupe**, Education Policy Intern, The Scholarship Foundation of St. Louis and graduate, University of Missouri-St. Louis
- **Nikki Richie**, student, St. Louis Community College

9:45 - 10 BREAK

10 – 10:30 **What Counselors Need to Know to Support Comprehensive Financial Planning**

- Issues to be discussed will be guided by introductory Shaping Our Day conversation and input provided by participants at registration.
- Presenter: **Teresa Steinkamp**, Advising Director, The Scholarship Foundation of St. Louis

10:30 – 11:15 **Comparing Financial Aid Awards: Higher Education Institutional Perspective**

- Financial aid advisors from five higher education institutions will discuss how they would award sample student with three different EFC scenarios.
- Moderator: **Alan Byrd, Jr., Dean of Enrollment Services, University of Missouri-St. Louis**

Panelists:

- **Valerie Jensen**, Assistant Director of Counseling and Outreach, Saint Louis University
- **Kathleen Foster**, Associate Director, Student Financial Aid, University of Missouri – St. Louis
- **CortneyJo Sandidge**, Senior Assistant Director at University of Missouri-Columbia, and Early Awareness Chair for the Missouri Association of Student Financial Aid Personnel (MASFAP)
- **James Green**, Director of Financial Aid, Harris-Stowe State University
- **Shawn Harrell**, Financial Aid - Student Services Assistant, St. Louis Community College

11:15 – 11:45 **Break Out Sessions: How Counselors Can Support Financial Planning**

Participants will select one student category to discuss strategies for providing strategic financial guidance to students.

- **Undocumented/DACA students** – **Felipe Martinez**, Immigrant Student Advisor, The Scholarship Foundation of St. Louis
- **Homeless students** – **Valerie Jensen**, Assistant Director of Counseling and Outreach, Saint Louis University
- **Pregnant/parenting students** – **Teresa Steinkamp**, Advising Director, The Scholarship Foundation of St. Louis
- **Students with guardianship issues** – **CortneyJo Sandidge**, Senior Assistant Director at University of Missouri-Columbia, and Early Awareness Chair for the Missouri Association of Student Financial Aid Personnel (MASFAP)

11:45 – 12 **Sharing Strategies: Reports from the Breakout Groups**

- **Drew Schwartz**, Director of Learning and Career Development, Education Plus

12 – 12:30 **Lunch Discussions**

Resources and Tools

Sharing of resources and tools counselors have found helpful, including Scholarship Central

- **Ellen Vietor**, Scholarship Central Manager, St. Louis Graduates

What Next? Call to Action

Now that we have a better understanding of factors impacting student financial aid, we will identify opportunities to better support students from policy and programmatic perspectives. Opportunities discussed:

- Advocating for state financial aid policy – **Karissa Anderson**, Manager of Advocacy and Policy Research, The Scholarship Foundation of St. Louis and St. Louis Graduates
- Follow up coaching support for counselors, financial aid literacy workshops for students/parents – **Ellen Vietor**, Scholarship Central Manager, St. Louis Graduates

12:30 – 12:45 Evaluations/Closing/Adjourn

- **Drew Schwartz**, Director of Learning and Career Development, Education Plus

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