

## Concurrent Sessions Schedule Details

### Sessions A – Monday, June 9, 10:45 am – noon

#### Session A-1:

**Title:** Building Relationships Between Fundraisers and Fund Administrators

**Type:** Presentation

**Presenters:** **Kirsten Darling** is the Specialist - Strategy and Partnerships at the University of Alberta. She has worked within Student Financial Support in various roles for the past 20 years and has been in her current role for 1.5 years. Her role is to support the work of the Advancement folks who steward donors by providing guidance around policy, procedure and institutional priorities. The result of this work is a framework of funding that supports a diverse student body. Kristen is a hockey mom of two, and we enjoy spending as many days as we can at our lake on the boat or camping in the wilderness. Co-presenter **Fiona Halbert**, Assistant Registrar and CASFAA Secretary, has been with the University of Alberta for nearly 20 years. She has successfully led Student Financial Support through several organizational transitions over the years. She is also an active sports and dog mom who enjoys travelling.

**Description:** This session will share learnings with regards to building trust and fostering relationships with fundraisers and Development folks. As Student Financial Support works closely with our fundraisers and Development experts, it is important that we can exchange ideas and information freely in a collaborative environment. Attendees will come away with new ideas as to how this kind of relationship can be fostered. This will also be an opportunity for colleagues to share their experiences and best practices in their work.

#### Session A-2:

**Title:** Scholarship Non-Renewal Practices: Balancing Academic Integrity with Compassion

**Type:** Presentation

**Presenter:** **Michael Heighton** is the Scholarship and Admissions Officer for St Francis Xavier University. After a 10-year career in IT within the private sector, Michael joined StFX in July 2024 to coordinate the entrance and application-based scholarship programs at the university. He is also co-chair of the 2025 CASFAA conference committee.

**Description:** This session will focus on the challenges of managing award-based renewals where academic merit is prioritized over financial need. Best practices in managing scholarship non-renewal appeals processes, including the benefits of developing a standardized non-renewal appeals process as compared to ad-hoc decision making, will be discussed. Micheal was instrumental in introducing an appeal process at StFX in summer 2024 that is both visible and trauma-informed in its approach. Attendees will also be encouraged to share their own experiences and best practices in this area of award adjudication.

#### Session A-3:

**Title:** 30 days to 3 hours - NSLSC Batch Processing at U Calgary

**Type:** Presentation

**Presenter:** **Joel Dooley-May**, MEd, Assistant Registrar, Student Financial Support at University of Calgary. Joel has been directly involved in all things Student Financial Support for 15 years. He is currently the CASFAA Regional Director for Alberta, Northwest Territories and Nunavut and the Past-President of the Alberta Student Awards Personnel Association (ASAPA). His passion is team development and creating efficiencies to allow his team the capacity to develop. Joel is certified in change management and lean six sigma and using the tools to streamline operations and make changes to enhance student experience. Outside of work he spends as much time as he can with his wife and four-year-old daughter.

**Description:** Joel will share the experiences of his team with NSLSC batch processing at the University of Calgary, where they were able to take their processing time from 30 days to just 3 hours. Efficient use of the batch processing feature within the NSLSC Electronic Confirmation of Enrolment has allowed the team to

connect students with their funding faster and take back time in their collective schedules for other projects and supports. Joel will share how this was accomplished and how your school may do the same.

## **Sessions B – Monday, June 9, 1:15 – 2:30 pm**

### **Session B-1:**

**Title:** How Do You Use AI In Your Work? (Part 1)

**Type:** Round-Table Discussion

**Presenters:** **Sheryl Trimm**, BBA, is the Manager, Student Finance at Cape Breton University. She brings a wealth of knowledge and experience to her work in student finance, having worked in both private and public post-secondary education settings during her varied career. Sheryl currently serves as the CASFAA Regional Director for Nova Scotia and Prince Edward Island and is a member of the 2025 conference planning committee. In her spare time, she enjoys travelling with her family to new destinations and relaxing on the beautiful waters of Cape Breton Island.

**Description:** The effects of artificial intelligence (AI) in the classroom and the workplace are undeniable, our reactions to them can be varied. Do you worry that AI is replacing traditional student engagement in the award application process? Has AI helped to streamline activities and improve performance in your office or among your staff? Do you want to start exploring how AI might assist you in your work but don't know where to start? Do you have AI tips and tricks you could share with your fellow financial administrators? In this round-table discussion, host Sheryl will offer attendees a space to ask questions, discuss fears, share successes, and explore uses of AI in the work that we do.

### **Session B-2:**

**Title:** Prestige Award Selection - Moving Toward the Future

**Type:** Presentation

**Presenter:** **Joel Dooley-May**, MEd, Assistant Registrar, Student Financial Support at University of Calgary. Joel has been directly involved in all things Student Financial Support for 15 years. He is currently the CASFAA Regional Director for Alberta, Northwest Territories and Nunavut and the Past-President of the Alberta Student Awards Personnel Association (ASAPA). His passion is team development and creating efficiencies to allow his team the capacity to develop. Joel is certified in change management and lean six sigma and using the tools to streamline operations and make changes to enhance student experience. Outside of work he spends as much time as he can with his wife and four-year-old daughter.

**Description:** The University of Calgary has recently made major changes to its selection process for its Prestige Awards. In this presentation Joel will share what these changes involved and how he and his team have adopted a culture of constant improvements as they move forward in this area. The learning outcomes of this presentation will focus on best practices in award selection, bias elimination, and blind selection.

### **Session B-3:**

**Title:** Supporting Access to Post-Secondary Education through the Canada Student Financial Assistance Program

**Type:** Virtual Presentation

**Presenter:** **Jonathan Wallace** is Director General of the Canada Student Financial Assistance Program – a position he has held since April 2021. In this capacity, he is responsible for leading policy development, operations, and other activities to achieve the program's mission to support access to post-secondary education for Canadians. Prior to that, Jonathan was Executive Director of the Temporary Foreign Worker Program, where he led policy and regulatory changes to improve protections for migrant workers. Jonathan has also held executive roles as Director of Planning, Integrity and Repayment with the Canada Student Financial Assistance Program, and Senior Advisor to the Deputy Minister of Labour. Over the course of his 21-year career with the Public Service, he has also held policy-focused roles at Employment and Social

Development Canada and the Department of Finance. Jonathan enjoys leading teams and coaching employees for success, and loves to see people grow and realize their full potential. He values relationships, high quality work, evidence-based analysis, and achieving results. He also has a particular interest in fostering diversity and inclusion in the workplace. Most of all, Jonathan is grateful for the privilege of being a part of the Public Service, and in that regard, for contributing towards improving the lives of Canadians, strengthening trust and confidence in government, and supporting a free, democratic society. Jonathan holds a Bachelor of Science from McMaster University, a Master of Urban and Regional Planning from Queens University, and a Master of Arts in Public Administration from Carleton University. He was born in rural Nova Scotia, and currently resides in Gatineau, Quebec.

When not working, Jonathan enjoys nurturing relationships with his friends and family. He also loves travelling, outdoor activities like biking, hiking, and kayaking, and tending to his plants.

**Description:** This presentation provides an overview of the ways in which the Government of Canada supports post-secondary education, with a focus on the Canada Student Financial Assistance Program. It also identifies recent trends in student financial assistance, key challenges faced by students, and actions the Government is taking to address these challenges. And it will include an update on current priorities and activities to better support students. This session will also include a question-and-answer period.

## **Sessions C – Monday, June 9, 2:45 – 4 pm**

### **Session C-1:**

**Title:** An Introduction to Scholarship Manager by Nextgen Web Solutions and A Case Study in Transforming Student Awards Management at Athabasca University

**Type:** Presentation

**Presenters:** **Dianne Fanning**, VP Software Solutions Sales, Next Gen Web Solutions, has 25+ years of experience helping grow technology businesses in higher education, K-12, and government markets. Her responsibilities have included product definition, system implementation, user training and customer support. She graduated from Trinity University in Washington, D.C. with a BA in business administration. With over 25 years of experience at Athabasca University (AU), **Valerie Olver**, Coordinator, Student Awards, responsibilities have mostly included the coordination of the student financial aid and awards operations in the Office of the Registrar. Since 2022, Val has focused on leading the university's Student Awards Transformation project, where she has played a key role in implementing Scholarship Manager by Nextgen Web Solutions. Val has been helping the university improve its award systems for students, administrators, and donors alike. She is excited to share the lessons learned and the benefits AU has gained through this transformation and is always eager to explore new ways to make award management efficient for everyone involved.

**Description:** Managing student awards and bursaries can be complex, resource-intensive, and difficult to scale, especially when trying to meet the evolving needs of students, administrators, and donors. This session introduces Scholarship Manager by Nextgen Web Solutions as a transformative and flexible digital solution designed to streamline and simplify the entire student awards lifecycle. See how Scholarship Manager supports institutions in tackling common challenges such as managing high volumes of applications, dealing with varying eligibility criteria, accessing financial need, conducting timely reviews, and optimizing fund utilization. The platform also enhances student engagement with a user-friendly interface, while offering powerful tools to support communication, flexible reporting and enhanced donor relationship and stewardship activities. Athabasca University will share a case study on its Student Awards Transformation project, including key highlights from the implementation of Scholarship Manager. Attendees will gain insight into lessons learned, project outcomes, and the measurable benefits realized by AU since going live with the system in 2024. Whether you're beginning your digital transformation journey or looking to update your current awards management processes, this session offers valuable insights and practical takeaways.

## Session C-2:

**Title:** FAOs You're Not On Your Own

**Type:** Presentation

**Presenter:** **Suzanne Tyson**, CEO, Points for School, has been working in the post-secondary funding field for close to two decades. Her role as President of Studentawards.com provided her with a deep appreciation for student funding needs and their struggle to access government awards, scholarships, bursaries and other forms of funding. She founded HigherEdPoints in 2013 and in its 10 years of existence helped students and families offset more than \$3.6 Million in tuition and student loans by using their loyalty points. In 2024, with the sponsorship of Guard Me International Insurance, Suzanne launched Points For School, which will expand on the foundation she built with HigherEdPoints. In addition to tuition and student loans, Points for School will enable parents to fund RESPs with their loyalty points, as well as reaching out to international students pre-arrival to set them up for financial success during their studies.

**Description:** Financial Aid Officers' roles are far more complex and demanding than ever before, partly because today's students' needs often extend beyond financial support alone. If navigating funding options for in-course students was made easier for FAOs, time could be better spent helping to resolve the non-financial challenges our students are facing. While it's true that many large awards are only open to graduating high school/CEGEP students, it is a myth that there is no funding out there for in-course students. This session will focus on providing FAOs with shareable resources and tips about funding and other options available to help in-course students persist and complete their education. As is always the case with Suzanne's sessions, a relaxed setting and interactive discussion will be encouraged.

## Session C-3:

**Title:** Breaking Silos: Strengthening Campus Collaboration for Student Success

**Type:** Presentation

**Presenter:** Aimee Macdonald (she/her) is a Gender and Sexual Diversity Advisor at St. Francis Xavier University (STFX), where she provides education and support to the campus community while advocating for 2SLGBTQIA+ rights. Holding a Bachelor of Information Systems from STFX (2002), a Post-Graduate Management Certificate in Human Resource Management from BCIT (2009), and a Master's in Adult Education in Community Development (2025). In addition to her professional work, Aimee is a dedicated mom of two children, two dogs, and a cockatiel, and she engages in rescue work with her family in their spare time. Aimee's passion lies in creating inclusive communities and empowering individuals through education and advocacy. **Brendan Roberts** recently graduated from StFX with a Bachelor of Arts (Honours) in Public Policy and Governance with a Subsidiary in Political Science. During his time as a student, Brendan was heavily involved on campus, most notably through his work with the Students' Union, serving in various roles including Vice President Finance and Operations, President, and Chair of the Board of Directors. Through his work with the Students' Union, Brendan oversaw the administration of an emergency grants program aimed at providing rapid financial relief to students who were in emergency situations that prevented them from continuing with their studies. Since graduating, Brendan has moved to Halifax and now serves as the Executive Director of a small non-profit advocacy group called Students Nova Scotia. Coach **Gary Waterman** enters his 17th season as Head Coach, and his 20th season overall with the StFX X-Men Football coaching staff. The six-time AUS Coach of the Year has won six AUS championship titles as Head Coach. Coach Waterman was also named the 2022 U SPORTS Coach of the Year. **Mary Fisher-MacDonnell** began working at St. Francis Xavier University in 2005 and will enter her eleventh year in September as a member of the StFX Office of the Registrar in the role of Financial Aid Officer. Mary has a keen interest in furthering relationships between offices and departments to best serve students. She believes strongly in providing a holistic approach to supporting students in post-secondary education and working together towards the common goal of helping students to succeed. Mary serves on the CASFAA board as Member at Large – External Relations. In her spare time, she can usually be found listening to CBC Radio and experimenting with new recipes.

**Description:** Supporting students effectively requires teamwork across departments, breaking down silos, and fostering strong campus collaborations. This session will share the experiences of four colleagues at

StFX striving to do just this. Join us as we explore strategies for working across academic advising, athletics, financial aid, student affairs, student government, and other campus offices to create a holistic support system. The presenters will share the practices they have developed for communication and innovative partnerships that enhance student success. Of particular interest will be the approaches they have developed to providing timely and effective emergency assistance, ensuring students in crisis receive the support they need to stay enrolled and succeed. Attendees will learn best practices for balancing institutional policies with student-centered solutions, developing proactive response systems, and building a compassionate safety net that helps students navigate their post-secondary experience.

## **Sessions D – Tuesday, June 10, 10:45 am – noon**

### **Session D-1:**

**Title:** People Before Paperwork: A Person-Centered Approach to Financial Aid

**Type:** Presentation

**Presenters:** **Heather Blackburn** is a Registered Nurse and serves as the Sexual Violence Prevention and Response Advocate at StFX University. She has spent her career walking alongside individuals and communities impacted by gender-based violence. She is dedicated to empowerment, advocacy and systemic change. Heather is most at home with her family or in the garden, growing flowers and playing with her two Dogs. **Mary Fisher-MacDonnell** began working at St. Francis Xavier University in 2005 and will enter her eleventh year in September as a member of the StFX Office of the Registrar in the role of Financial Aid Officer. Mary has a keen interest in furthering relationships between offices and departments to best serve students. She believes strongly in providing a holistic approach to supporting students in post-secondary education and working together towards the common goal of helping students to succeed. Mary serves on the CASFAA board as Member at Large – External Relations. In her spare time, she can usually be found listening to CBC Radio and experimenting with new recipes.

**Description:** In today's evolving postsecondary landscape, financial aid professionals are navigating increasingly complex student needs, systemic barriers, and shifting expectations. This interactive session will explore how person-centered approaches can transform financial aid interactions into opportunities for trust, empowerment, and support. Participants will examine the changing context of financial aid, including the impact of policy changes, rising student stress, and the growing importance of trauma informed practice and holistic support. Through real-world scenarios and guided discussion, we will explore how to respond effectively and empathetically to student disclosures—while maintaining professional boundaries and managing time constraints. Whether you're new to person-centered practices or looking to deepen your approach, this session will offer practical tools, reflective insights, and space for open Q&A. Join us to reimagine financial aid as a space where students feel seen, heard, and supported.

### **Session D-2:**

**Title:** Continuing the Conversation - Best Practices in Processing Title IV Loans, Alternative/Private Loans, and Veterans Affairs Benefits

**Type:** Round-Table Discussion

**Presenters:** **Jiffin Arboleda** and **Bianca Novielli** are both Senior Financial Aid Specialists at the University of Toronto. They jointly oversee the US financial aid portfolio at the University Registrar's Office, which includes processing US Title IV/Direct Loans applications, Sallie Mae and Earnest Loans certification requests, and US Veterans Affairs educational benefits. They are also actively involved in the re-certification and annual audit review processes for US Direct Loans.

**Description:** At this round-table discussion, Jiffin and Bianca will share the best practices that they use, the challenges that they face and the questions they ask or are asked when processing US funding, including Title IV, alternative/private loans such as Sallie Mae or Earnest loans, and Veterans Affairs educational benefits. Have a question about one of these programs or US financial aid in general? Please complete the survey that Jiffin and Bianca have posted to the US Government Aid forum for members on the CASFAA website before travelling to the conference.

### Session D-3:

**Title:** Entrance Bursaries Across Canada: A Round-Table on Strategy, Access, and Impact

**Type:** Round-Table Discussion

**Presenters:** **Sana Malik**, is the Team Lead, Fees & Financial Aid at MacEwan University. She is an experienced post-secondary professional with a background in both private and public institutions. In this role, Sana oversees the daily operations of financial aid programs, including scholarships, awards, bursaries, and student loan funding. With over seven years of experience in the sector, Sana is committed to improving access and affordability through student-centered practices. **Marcelo Cisterna**, is a Financial Aid Advisor, Fees & Financial Aid at MacEwan University, bringing over a decade of experience as an educator and administrator in post-secondary education. His expertise lies in guiding students through financial aid processes, ensuring they receive the necessary support for academic success. Marcelo's commitment to education and student development has been a consistent theme throughout his career.

**Description:** As affordability continues to shape the post-secondary landscape, institutions are increasingly relying on bursaries as a tool to support students. This round-table session offers an opportunity to engage in a focused conversation about how entrance bursaries are used, governed, and assessed. Through open-ended discussion, participants will be encouraged to reflect on questions such as: Does your institution offer entrance bursaries? What are the goals of your entrance bursary program? How do you measure its efficacy? How have you adapted your financial aid strategies in response to the affordability crisis? Is your institution prioritizing broad financial support, or directing funds to students most in need? What have you done to make the entrance bursary program more accessible? The session will delve into how and when bursaries are leveraged during the admissions cycle or academic year. It will also provide an opportunity to share insights, discuss challenges, and learn from peer institutions across Canada. Sana and Marcelo's goal is to create a collaborative space where both emerging and established practices are discussed openly, with a focus on continuous improvement and student success.

### Sessions E – Tuesday, June 10, 1:15 – 2:30 pm

#### Session E-1:

**Title:** Understanding Finastra's Role in Canadian Student Aid

**Type:** Presentation

**Presenters:** **Marc Guindon** is the multitasking maestro behind student lending at Finastra, where he juggles titles like Manager of Educational Institutional Relations and Services for Student Lending, and Customer Success Lead for Nova Scotia and Prince Edward Island—because one province just isn't enough. Since 2002, Marc has been the go-to guy for making student lending smoother than a freshly laminated diploma. Whether he's championing CSFA initiatives or translating institutional needs into action, Marc is on a mission to make the student experience better, brighter, and a whole lot more efficient—one strategic meeting (and probably one coffee) at a time.

**Description:** Have you ever wondered how Finastra fits into the government aid landscape in Canada? Do you understand its role in facilitating funding and repayment for students? Do you have questions about the NSLSC ECE Portal? In this session Marc will begin with a brief overview of what Finastra does and then open the floor for your questions about its programming and supports.

#### Session E-2:

**Title:** Powering Up Scholarships: Smarter Data, Better Decisions

**Type:** Presentation

**Presenters:** **Joanne Salem** holds a Bachelor of Business Administration in Psychology and another in Industrial Relations from the Université de Montréal. She later completed an MBA at HEC Montréal in 2021. For the past ten years, Joanne have been working at HEC Montréal as a Team Leader for Scholarships and Financial Aid. **Joanne Diwan** (JD) also studied at HEC Montréal and earned an MBA from the University of

Ottawa. She has been with HEC Montréal for 11 years and currently serves as the Director of Student Community Services, overseeing student life, scholarships, and financial aid.

**Description:** Join Joanne and JD as they share how Power BI is transforming the way they analyze scholarship data and can help institutions make more informed and strategic decisions. By centralizing and visualizing key metrics such as scholarship offerings over the years, application trends, and recipient profiles, administrators can uncover valuable insights that drive efficiency and equity in their distribution. Joanne and JD will showcase how the team at HEC Montréal leverages Power BI to track and interpret scholarship data, improving their understanding of application patterns and funding allocation. Through dynamic dashboards and data visualization, they gain a clearer picture of trends, enabling them to optimize processes and better support students. This session will be beneficial for professionals managing scholarships, admissions, and financial aid, as well as those looking to enhance their institution's data-driven decision-making. Attendees will leave with practical insights into how they can use Power BI to work smarter with their statistics, ensuring a more efficient and impactful approach to award management.

### Session E-3:

**Title:** Moving From a Financial Hardship Bursaries Program to a Support Service for Students in Financial Difficulty

**Type:** Presentation

**Presenters:** This group of colleagues is joining us from Université Laval. **Francis Brousseau** has been working in the Office of Awards & Financial Aid for over 20 years, most recently as the director for 11 years. **Pascale Desrochers** has been responsible for the government financial aid sector for six years. She is part of the team of advisors who provide support to students in financial difficulty.

**France Gratton** joined the team more than three years ago. She oversees federal and provincial research grants and other merit-based scholarships. France is also part of the team of advisors who provide support to students in financial difficulty.

**Description:** Francis, Pascale, and France will present the transformation of their service offered to students in financial hardship. Previously, Université Laval had an application-based bursary program always available to students in financial difficulty. This program has moved from one that involved little contact with staff to one that is referral based and can now include one-on-one meetings, temporary bursary support, and personalized financial counselling. A new file documentation system also allows for better monitoring if the student requests services again. The aim of this presentation is to share the team's positive experience of transforming their service with colleagues.

## Sessions F – Tuesday, June 10, 2:45 – 4 pm

### Session F-1:

**Title:** Your CASFAA Board at Work for You

**Type:** Round-Table Discussion

**Presenters:** **Elizabeth Perez**, Vice President of CASFAA & Director of Ressources socio-économiques des Services à la vie étudiante at the Université de Montréal, has been a CASFAA board member since 2017, proud to have chaired the 2018 and 2021 conferences and recently focusing her energies on the new strategic and action plans. She has been in her position at UdeM since 2014, managing a dedicated team and ensuring that services meet the evolving needs of students. Elizabeth is a passionate advocate for financial education and accessibility in higher education. To that end she is an active member of Quebec's « Comité consultatif sur l'accessibilité financière aux études (CCAFE) » and works collaboratively with institutional partners to advance the financial wellness agenda on campus and to ensure that philanthropic funding addresses underserved student populations. **Josh Levac**, Director, Enrolment Services – Financial Aid, Niagara College, was first drawn to the field of financial aid as a recipient in his undergraduate studies. His studies took him across the country and when he decided to stop focusing on his education, he made the leap into the wonderful world of financial aid. Having worked at three institutions Josh loves to think about financial aid

and how it can help make education affordable and accessible. He tries to instil his love of the field to his colleagues and staff through presentations and training sessions. Josh serves at CASFAA president. In his spare time, you can find Josh swimming or bird watching.

**Description:** Join current CASFAA Vice President Elizabeth and President Josh for a round-table discussion about the work the board has undertaken over the past year and the direction they see the board moving during the upcoming year. Have a question about the association's constitution, bylaws, or policies? Interested in learning more about the strategic plan? Is there a project you would like to see CASFAA undertake? Do you have a suggestion for the type of activities the new Director of Data and Information or Director of Scholarships and Awards roles could support? This is your opportunity to share ideas and provide direct feedback as members to the board that serves you.

### **Session F-2:**

Guided walking tour of St. Francis Xavier University, meet in the Joyce Atrium on the first floor of Mulroney Hall at 2:45 pm.

### **Session F-3:**

**Title:** Revitalizing Bursaries: An End-to-End Review for Enhanced Student Experience and Program Sustainability

**Type:** Presentation

**Presenters:** **Fiona Halbert**, University of Alberta, has been working in the field of financial support for over 15 years. Fiona is passionate about supporting access to postsecondary through financial support programming. This passion has driven her to serve on the Board of Directors for CASFAA as Secretary for the last four years, advocating for student financial well-being. **Minder Johal**, University of Alberta, has worked in the financial support sector for the last four years. As a first-generation post-secondary student herself, she believes that education is a remarkable journey in everyone's life and finds pride in assisting learners to break through financial barriers, so they can embark on the most valuable experience of life, learning!

**Description:** This session delves into the comprehensive end-to-end review of the domestic bursary application and assessment practice recently undertaken by Fiona and Minder at the University of Alberta. This was a critical initiative designed to improve the student experience and ensure the program's long-term sustainability in the face of rising student financial needs and constricting institutional resources. This directly engages with the conference theme by addressing the imperative of adapting and innovating within educational support systems to meet evolving student demands and fiscal realities. Fiona and Minder will speak to the methodology and key findings of their review, highlighting the challenges and opportunities identified, including key learning about student-centered design, operational efficiency, and data-driven decision-making. Through collaborative discussion, attendees will gain practical insights that they can apply to their institutions or programs, as well as share their own experiences regarding best practices in student financial aid and innovative approaches to program sustainability.

## **Sessions G – Wednesday, June 11, 9:15 – 10:30 am**

### **Session G-1:**

**Title:** Steal the Idea!

**Type:** Round-Table Discussion

**Presenters:** **Marla Douglas**, BBA, MBA, is the Assistant Registrar, Student Finances at Saint Mary's University in Halifax, Nova Scotia. Marla's experience working in banking strengthened her conviction that financial literacy helps students make sound financial decisions, allowing them to focus on their academic success while lessening their financial burdens.

**Description:** Join Marla for this interactive opportunity to share best practices from your office, department, or school. This is your chance to talk about what you have tried and has worked well – or that you would warn against! Be inspired by new ideas that you could also implement in your work.

### **Session G-2:**

**Title:** Out-of-Province Summaries Review: An Integral CASFAA Tool

**Type:** Round-Table Discussion

**Presenters:** **Sheryl Trimm**, BBA, is the Manager, Student Finance at Cape Breton University. She brings a wealth of knowledge and experience to her work in student finance, having worked in both private and public post-secondary education settings during her varied career. Sheryl currently serves as the CASFAA Regional Director for Nova Scotia and Prince Edward Island and is a member of the 2025 conference planning committee. In her spare time, she enjoys travelling with her family to new destinations and relaxing on the beautiful waters of Cape Breton Island. **Joel Dooley-May**, MEd, Assistant Registrar, Student Financial Support at University of Calgary. Joel has been directly involved in all things Student Financial Support for 15 years. He is currently the CASFAA Regional Director for Alberta, Northwest Territories and Nunavut and the Past-President of the Alberta Student Awards Personnel Association (ASAPA). His passion is team development and creating efficiencies to allow his team the capacity to develop. Joel is certified in change management and lean six sigma and using the tools to streamline operations and make changes to enhance student experience. Outside of work he spends as much time as he can with his wife and four-year-old daughter. **Mara Scofferi**, joined McGill University's Scholarships and Student Aid Office in April 2022 as a Service Representative, where she developed a strong passion for assisting students and delving into the intricacies of financial aid programs offered by both the university and Canadian governments. She then transitioned to the role of Financial Aid Counselor meeting students on a regular basis and providing a customized need assessment to students to assist them with their financial difficulties. Known for her relentless drive and commitment. In April 2023, she embraced a new challenge as the Front Line Team/Client Services Manager within the same office, further enhancing her expertise in financial aid nuances and promoting financial literacy among students. Her latest venture includes serving as the Quebec Regional Director for CASFAA, aiming to influence policy makers and advocate for student financial assistance initiatives. Mara keeps improving her experience at McGill and recently became senior Financial Aid Counselor for the Quebec portfolio.

**Description:** The Out-of-Province Summaries are one of the most actively accessed resources offered on the CASFAA website. Compiled each year by the association's regional dictators, the summaries provide instruction from an out-of-province user's perspective for each of the provincial, territorial, and federal assistance programs. Join Joel, Mara, and Sheryl for a discussion about what goes into these summaries and tips on how they can best be used. This session will also provide attendees with a valuable opportunity to provide feedback on the format and content of the summaries.

### **Session G-3:**

**Title:** Managing Your Relationship with Your Phone and Social Media

**Type:** Presentation

**Presenters:** **Kim Rhymes** is the Manager of Scholarships & Financial Aid at Acadia University. She has long had an interest in maximizing her health but has not always felt successful in that area. She realized two years ago that social media was hurting her. Despite that, it took her until early this year to finally delete her accounts. Kim wants to share what eventually changed that helped her make that decision and what you can do to take your power back, both from social media and from your phone.

**Description:** Do you have a complicated relationship with social media? Love it? Hate it? Can't live without it? Wonder what it's doing to your brain and mental health? Hear from Kim, who tried for years to limit her time online and finally made the decision to delete her social media accounts in the name of mental freedom.

and real relationships. Don't worry if you're not ready or willing to do that yet. Kim will share her rules for using her phone as the tool it is, instead of feeling like she's the one being used!

## **Sessions H – Wednesday, June 11, 10:45 am - noon**

### **Session H-1:**

**Title:** Sneak Peek: CASFAA Financial Literacy Survey

**Type:** Presentation

**Presenters:** **Necia Martins** holds a Bachelors of Science from Western University, an MBA from Wilfrid Laurier University and a Doctorate in Educational Leadership from Western University. She has worked in higher education for 16 years and has been part of Enrolment Services at Wilfrid Laurier University for 13 years. She currently serves as the Associate Registrar, Student Finance & Client Services. In this role, she oversees Financial Aid, Student Awards, Student Accounts, Financial Literacy, and Service Laurier, which is the one-stop service centre for Enrolment Services. Necia is a contract instructor, teaching organizational behaviour and leadership courses. She supports CASFAA's mandate by contributing to the National Benchmarking Survey and developing financial literacy resources through the Research Grant (2024-25). Necia has served as a communication executive with the Ontario University Registrars Association and is currently a member at large on OURA's EDI Standing Committee. Additionally, she volunteers as a Director on the board of a local daycare. She is excited for the CASFAA 2025 conference for sound sleep and warm food as her two little ones are having a blast with their grandparents.

**Description:** This session will provide insights into preliminary trends and findings from the CASFAA Financial literacy survey. Survey highlights will be shared, and current financial literacy research. Attendees will also have the opportunity to provide feedback to shape resource development.

### **Session H-2:**

**Title:** How Do You Use AI In Your Work? (Part 2)

**Type:** Round-Table Discussion

**Presenters:** **Sheryl Trimm**, BBA, is the Manager, Student Finance at Cape Breton University. She brings a wealth of knowledge and experience to her work in student finance, having worked in both private and public post-secondary education settings during her varied career. Sheryl currently serves as the CASFAA Regional Director for Nova Scotia and Prince Edward Island and is a member of the 2025 conference planning committee. In her spare time, she enjoys travelling with her family to new destinations and relaxing on the beautiful waters of Cape Breton Island.

**Description:** The effects of artificial intelligence (AI) in the classroom and the workplace are undeniable, our reactions to them can be varied. Do you worry that AI is replacing traditional student engagement in the award application process? Has AI helped to streamline activities and improve performance in your office or among your staff? Do you want to start exploring how AI might assist you in your work but don't know where to start? Do you have AI tips and tricks you could share with your fellow financial administrators? In this round-table discussion, host Sheryl will offer attendees a space to ask questions, discuss fears, share successes, and explore uses of AI in the work that we do. **Note:** This session is a second opportunity for attendees to participate in this important discussion. This session is being offered twice in the schedule as this was a subject area that was highly requested in the pre-conference questionnaire sent to CASFAA members on conference content.

### **Session H-3:**

**Title:** Decoding Financial Need: How Institutions Assess Student Financial Need

**Type:** Round-Table Discussion

**Presenters:** **Justin McKiel** is in the Director, Financial Aid role at the University of New Brunswick. With a focus on supporting students through financial aid resources, Justin is looking forward to exploring financial aid policies, opportunities and challenges in bursary awarding, and strategies that enhance student success and retention. Outside of work, Justin enjoys riding his bike, learning to make pizza, and spending time with friends and family. **Mary Fisher-MacDonnell** began working at St. Francis Xavier University in 2005 and will enter her eleventh year in September as a member of the StFX Office of the Registrar in the role of Financial Aid Officer. Mary has a keen interest in furthering relationships between offices and departments to best serve students. She believes strongly in providing a holistic approach to supporting students in post-secondary education and working together towards the common goal of helping students to succeed. Mary serves on the CASFAA board as Member at Large – External Relations. In her spare time, she can usually be found listening to CBC Radio and experimenting with new recipes.

**Description:** Understanding how colleges and universities determine financial need is essential for both students and administrators. This session will provide an opportunity to discuss the methodologies schools use to assess student eligibility for need-based funding, including income evaluations, family contributions, and external financial resources. Justin and Mary will seek to explore key factors influencing institutional aid decisions, common misconceptions students may have about financial need calculations, and strategies for making award processes more equitable. We all strive to balance financial constraints with student support, ensuring aid reaches those who need it most. Join this round-table conversation to share how your school does this, what has worked for you – or what hasn't – and how you communicate the assessment process to students.