SUNDAY, JUNE 23

4:30pm-4:45pm

Welcome and Introduction of Faculty (FITZSIMMONS)
Room: Grand Ballroom
Relevant to all

4:45pm-6:00pm (Opening Plenary)

Breakpoint - The Changing Marketplace for Higher Education (McGEE)
Room: Grand Ballroom
Relevant to all
Colleges and universities across the country have entered a new world of increasingly complicated choices. Three important disruptive forces have converged and intensified in recent years: demographic disruption, economic disruption, and values disruption. Together these forces have changed and will continue to change the environment for higher education, often in ways that challenge sense mission, approaches to the market, and management practice. The battle ground for what is best described as disruptive adaptation will be defined by economic choices. Colleges and universities of all stripes will be challenged in remarkably complex ways to find new approaches to align their mission, market, and management practices and aspirations.

6:00pm-6:15pm

Introduction to Case Studies (FITZSIMMONS)
Room: Grand Ballroom
Relevant to all

MONDAY, JUNE 24

8:00am-9:00am (Plenary)

How Admissions Decisions are Made (DE LUCA, FITZSIMMONS, POWELL, ROBERTS)
Room: Grand Ballroom
Relevant to all
- Why do colleges make decisions that are sometimes hard to understand?
- Is there a perfect way to evaluate candidates?
How can we be fair to diverse populations and are there other “hooks” that will get a student admitted to the first-choice college?

How do public and private colleges make decisions?

What information do colleges want from the counselor and the school?

Why do colleges with similar standards make different decisions?

9:15am-10:45am (Breakout sessions - 3 options)

College Counseling 101 - Independent Schools (BONILLA)
Room: Martha’s Vineyard
Most relevant to: Secondary school participants
- How do I organize my college counseling program to be most effective and efficient?
- What are the key components of a four-year counseling plan?
- What guidance services should I provide to parents at each grade level?
- How do I build a college counseling program?

Immigration Issues in Higher Education (HERNANDEZ, SHAW, TBD)
Room: Duxbury
Relevant to all
This session will explore issues associated with immigrants in higher education and the changing landscape created by our current President. Panelists and session participants will explore trends and challenges associated with the recruitment, admission, enrollment and retention of immigrant students. We will discuss topics such as the access and the Dream Act, various state legislation regarding undocumented students, demographic shifts and enrollment, service to and retention of immigrant students (and their families), and other issues related to this special population.

Values, Choices, and Trade-Offs: Decision-Making Case Study (DONAHUE, MCGEE)
Room: Plymouth
Most relevant to: Higher ed participants
Colleges and universities today face an array pressures that often require difficult choices and trade-offs. The pressures and choices most often revolve around four issues:
- Accessibility: who will my college enroll and serve?
- Affordability: how will our students and families pay for it? Who can afford us and whom can we afford?
- Accountability: what kinds of outcomes ought students, parents, and society generally expect of us? Is this an investment worth making?
- Sustainability: what resources will we have to continuously improve our quality and maintain accessibility?

It is an essential role of trustees, administrative leaders, and faculty to ensure that the decisions and choices they make reflect the mission, vision and goals of the college as best they can. The college and situation described in the reading materials is fictional, but the choices are representative of those faced by colleges and universities across America. This exercise is designed to make you think about the
complicated interplay of issues. You will articulate priorities and trade-offs the college should consider and frame productive questions that college leadership should consider.

11:00am-12:30pm (Breakout sessions - 3 options)

**Asking the Right Questions: Bringing the Student to Life in the Application Process** (MENDOZA)
*Room: Martha’s Vineyard*
*Most relevant to: Secondary school participants*

The session will equip college counselors with the tools to "Ask the Right Questions" in order to empower students when applying to college. These questions are designed with the aim to assist students with building a powerful resume, completing applications, and interview preparation in order to "bring the student to life" during the application process.

**Legal Issues In College Admissions** (GERSHENGORN)
*Room: Duxbury*
*Relevant to all*

This session will address historical and current legal considerations in the college admissions process.

**Win-Win: Higher-ed, non-profit and city partnerships advancing the college readiness and persistence of first-generation students** (NAIK, PRUDENT, SINGER)
*Room: Plymouth*
*Most relevant to: CBO participants, higher ed participants*

As colleges and universities work to advance first-generation students’ preparation for and persistence in college, many are turning to collaborative partnerships. Partnerships between Institutions and CBOs bring the complementary strengths of each sector to address the academic, non-academic, and institutional challenges faced by students. In this session, you will hear from directors at Breakthrough Greater Boston, Bunker Hill Community College, and the City of Cambridge’s Office of College Success and discuss strategies and components of cross-sector partnerships grounded in specific examples.

TUESDAY, JUNE 25

9:00am-10:30am (Breakout sessions - 3 options)

**Leadership Roundtable** (HERNANDEZ, McGEE)
*Room: Plymouth*
*Relevant to all*
Leadership is a learned and practiced skill that comes in many forms. We will draw from decades of our professional experience to share and discuss key ingredients, values, and practices key to effective leadership.

**Recommendations, Part I** (CHENG, FITZSIMMONS, MOSLEY)

**Room: Martha’s Vineyard**

**Most relevant to: CBO participants, secondary school participants**

- How is the recommendation developed? How is information gathered?
- What are the admissions committees looking for in our letters?
- What are the components of a powerful letter?
- How much effect do our recommendations have?
- How can we do a good job without letting this task overwhelm us?

**Supporting the Transition to College for First-Generation Students – A CBO Perspective** (DONAHUE - introductions, GRANT)

**Room: Duxbury**

**Relevant to all**

Community-based organizations (CBOs) are an increasing part of the college admissions landscape. These diverse programs recruit and guide first-generation, low-income, and underrepresented students through the college process. During this session, we will look at the transition to college through a CBO lens. We will explore strategies and practices that advisors and counselors can implement to better support first-gen, low-income, and underrepresented students’ transition to college. Through a comparison of the SEO Scholars and College Track program models, we will discuss successful initiatives and services that have propelled first-generation, low-income students towards success in college. Further, we will examine summer engagement practices and pre-orientation outreach that help ease new college students’ transition into the university setting.

Participants will engage in discussions, small-group activities, and readings to challenge their thinking. We will provide participants with time to share best practices and lessons learned. Also, participants will have time to action-plan and consider strategies they can implement at their schools, within their organizations, or on their campuses.

**10:45am-12:15pm (Breakout sessions - 3 options)**

**A Look at the Changing Demographics: Who Will the College Freshmen Be 5-10 Years From Now?** (FITZSIMMONS, GIORDANO, HERNANDEZ)

**Room: Plymouth**

**Most relevant to: Higher ed participants**

We will take a look at the changing demographics of the high-school age and college-bound students across the nation over the next decade and the impact these changes will have on secondary schools and higher education.
Counselors’ Spheres of Influence (SKINNER)
Room: Martha’s Vineyard
Most relevant to: Secondary school participants
- What is our role within the school? To whom are we responsible?
- How do we maintain our integrity when people want results at all costs?
- Can we distinguish between power that we truly and appropriately have and power others think we have? Into what areas can/should our influence extend?
- Does our reputation matter?
- In what ways do we act as leaders in our communities? What are our responsibilities as leaders? What do we need to know? How do we read our school culture so that we can be most effective as leaders?
- What do we do, what should we do, to counteract the impact of college admissions pressure on the mission of our schools?

Financial Aid 101 (DONAHUE, STAFFIER)
Room: Duxbury
Most relevant to: CBO participants, secondary school participants
- I don’t know about the financial aid process; what do I need to get my job done?
- FAFSA; SAR; What is all this alphabet soup? What are these forms, and what do they do?
- What is the IRS Data Retrieval Tool and why is it important for families to know about it?
- What is a “PROFILE?”

1:15pm-2:45pm (Breakout sessions - 3 options)

Admissions Office Management (MOSLEY, ROBERTS)
Room: Plymouth
Most relevant to: Higher ed participants
This session will cover, for admission personnel primarily, the basics of managing and operating an admission office. What are the central issues and concerns in directing a highly visible and reasonably complex organization? How are the functions and responsibilities determined? What are the various constituencies and departments that admissions serves? Indeed, is the core function of the office one of service or one of recruitment? This is an interactive session to share operation and tactical ideas.

Early Decision/Early Action (BONILLA,PROTO, SHAW, POWELL)
Room: Martha’s Vineyard
Most relevant to: Secondary school participants
- How did we get here and where are we going?
- Who should apply early and who should not?
- Are there advantages for students or do early programs simply serve the colleges?
- How important is financial aid for students thinking of applying early?
Showcasing Your School — An Effective High School Profile (CHENG, MENDOZA)
Room: Duxbury
Most relevant to: Secondary school participants
- What are the essential items needed on a high school profile?
- What helps a selective college determine the curriculum rigor and success of an applicant from a high school that does not use class rank?
- What can be left off a high school profile?
- See examples and hear perspectives from the public, private, and international school side as well as the college side on issues concerning the design and effectiveness of a high school profile.

3:00pm-4:30pm (Breakout sessions - 3 options)

CBO Meet-and-Greet
Room: Plymouth
Most relevant to: CBO participants
This is an opportunity to meet and network with colleagues from other community-based organizations, and share dialogue about challenges, triumphs and effective practices. This is a participant-driven gathering; there will be no formal agenda or designated facilitator.

Managing Student Debt (STAFFIER)
Room: Duxbury
Most relevant to: CBO participants, secondary school participants
- As a counselor, what do I need to know about student borrowing?
- How much debt is too much debt?
- How do I explain unmanageable debt to my students/parents?
- What is this 8\% rule, and how do I help my students apply it?

Selecting a College in a Competitive Climate (BONILLA, SKINNER)
Room: Martha's Vineyard
Most relevant to: Secondary school participants
- How do we set up a structure that will help students take control of selecting their college?
- How do we protect them, give them space, so they can make the best choices for themselves?
- How do we communicate the realities of our current competitive environment?
- How much input should we as counselors have over our students’ choices?
- How do we persuade parents to play an appropriate role and not become a destructive or inhibiting force in their kids’ lives?

4:30pm-5:45pm
Case Study Discussion Groups
Rooms: Chatham, Concord, Dedham, Duxbury, Martha’s Vineyard, Plymouth, Sturbridge (please refer to your nametag for assignments)
Relevant to all

WEDNESDAY, JUNE 26

8:00am-9:00am (Plenary)

Morning Keynote Address - David Coleman (President and CEO, The College Board)
Room: Grand Ballroom
Relevant to all

9:00am-10:30am (Breakout sessions - 3 options)

How Admissions Decisions are Made at Selective Public Universities (HERNANDEZ, ISHOP, KOSTELL, ROBERTS)
Room: Martha’s Vineyard
Most relevant to: Secondary school participants
The panel will highlight the wide range of the application reviews at highly selective public universities, ranging from a larger, multi-campus state admission system, to percent plans, to the more classically holistic approach. The team of experts will also discuss residency ratios, testing requirements, and the political pressures facing some of the leading public universities in the country.

Recommendations, Part Two: Writing Those Tough Letters (SKINNER)
Room: Duxbury
Most relevant to: Secondary school participants
● How much is enough; how much is too much?
● How do you handle the difficult situations in your counselor recommendation: i.e., discipline, family difficulties, legal difficulties, physical/emotional problems, learning disabilities?
● How do you navigate the sometimes competing responsibilities to student, school, college, and conscience?

Targeted Recruitment Through On-Campus Visit Programs (SCHMILL, SMITH)
Room: Plymouth
Most relevant to: Higher ed participants
Visiting campus is the best way for a student to learn if a college or university may be a good fit for them. Not all students have the means to visit, however. This session will discuss how two universities structure their visit programs to ensure that they are open and accessible to all.
10:45am-12:15pm (Breakout sessions - 3 options)

Communicating With Students and Using Student Search Service (GIORDANO, MOSLEY, SHAW)
Room: Plymouth
Most relevant to: Higher ed participants
- Where is the cutting edge in inquiry generation and communicating with prospective students?
- What are the most common communication mistakes?
- Where can I license names?
- What is an appropriate communication sequence?
- How are colleges adapting to the impact of electronic communication and understanding how to incorporate it in their recruitment plans?

Enrollment Management 101 (DE LUCA, MARINACCIO, PROTO, RICHARDSON)
Room: Duxbury
Most relevant to: Higher ed participants
- What is enrollment management?
- How do enrollment managers help define and support institutional priorities?
- What dilemmas do enrollment managers face in addressing competing priorities?
- What strategies are effective in building enrollment management teams?
- What are the institutional benefits of implementing an enrollment management model?

Financial Aid 102 (DONAHUE, STAFFIER)
Room: Martha’s Vineyard
Most relevant to: CBO participants, secondary school participants
- What is the “Family Contribution” and how is it determined?
- What is a financial aid “Package” and how do colleges determine it for a student?
- What is a Net Price Calculator, and is it any good?
- “Federal Methodology” and “Institutional Methodology,” what are they? What is the difference?

1:15pm-2:45pm (Plenary)

The Case for Diversity in Admission: Why Does Racial Diversity Matter And How Do We Best Achieve It? (ISHOP, POWELL, ST. JOHN)
Room: Grand Ballroom
Relevant to all
This session will include historical context of Supreme Court cases and state legislation and how universities have successfully worked towards achieving student diversity using legal means. Important points of discussion will include the value of student diversity in higher education, how the value justifies the consideration of race as one of many factors in admission, and the need for a broad, institutional approach in supporting diversity goals in admission.
3:00pm-4:30pm (Breakout sessions - 3 options)

The Admissions Process at Service Academies (McDONALD)
Room: Plymouth
Most relevant to: CBO participants, secondary school participants
Learn what America’s Service Academies are looking for in applicants. Demystify the dual processes of applying to a Service Academy and acquiring a congressional nomination. The Naval Academy, U.S. Air Force Academy and U.S. Military Academy (West Point) use admission processes that are guided by Title 10, United States Code. This means that representatives from every congressional district and territory across the United States can nominate candidates for appointment. Service academies are committed to assembling a student body of potential leaders who reflect the geographic, ethnic and cultural diversity of the country they will serve and the people they will lead. You have students who want to be part of something greater than themselves and who may aspire to serve in the military. Discover how you can help them get there.

Essay Writing Workshop (CHENG, MENDOZA, RICHARDSON)
Room: Martha’s Vineyard
Most relevant to: CBO participants, secondary school participants
How often have you worked with students and heard the same thing, "I've got all of my applications done - except the essays", only the most important part of the college application? Join us for this session and learn some helpful hints on writing the essay. Questions about what colleges look for in the essay, how to get started and the different types of questions asked by colleges will be some of the topics covered. Perspectives from panelists from both the high school counseling and college sides will be given with practical tips to bring back to share with your students and staff.

Social Media From The Dean’s Office (KOSTELL, POWELL, SCHMILL)
Room: Duxbury
Most relevant to: Higher ed participants
As most of the current generation of Deans are not social media natives, what are the opportunities and perils of attempting to be a Digital Dean?

4:30pm-5:45pm

Case Study Discussion Groups
Rooms: Chatham, Concord, Dedham, Duxbury, Martha’s Vineyard, Plymouth, Sturbridge (please refer to your nametag for assignments)
Relevant to all

THURSDAY, JUNE 27

9:00am-10:30am (Breakout sessions - 3 options)
Expanding Opportunity for Student Success (AURIEMMA, GIORDANO)
Room: Martha's Vineyard
Relevant to all
This session will provide an overview of new programs and resources which further expand opportunity for students to meet with success. Included in this conversation will be an overview of the 2019-2020 Changes to AP as well as the College Board Opportunity Scholarships that drive students’ college knowledge regardless of academic merit. It will conclude with an overview of the Environment Context Dashboard.

Practical Recruiting (DE LUCA, FURDA, MCGANN)
Room: Plymouth
Most relevant to: Higher ed participants
- Are high school visits the best approach?
- What outreach activities have an impact on high school students and counselors?
- What is a sensible way of developing a targeted marketing plan?

Supporting Low-Income Students in the Financial Aid Process: A Nuts and Bolts Session (STAFFIER)
Room: Duxbury
Most relevant to: CBO participants, secondary school participants
Have you ever thought about the power of a checklist as a way to help low income students through the financial aid process? In the book “The Checklist Manifesto” the author, Atul Gawande, comes to the following conclusion “..under conditions of complexity, not only are checklists a help, they are required for success.” Low income students often need the most help to successfully navigate the financial aid process and, without that help, could miss out on eligibility for financial aid. This session will walk you through a series of checklists that you can utilize with your students. As a supplement to these checklists, we will dive into the nuts and bolts of the complex financial aid process, providing a simple approach to best enable you to help counsel low income students.

10:45am-12:15pm (Breakout sessions - 3 options)

No Norm is the New Norm: How to Work Effectively and Caringly with the Diversity of Individuals in Our Respective Communities (BONILLA, SKINNER, ST. JOHN)
Room: Martha's Vineyard
Relevant to all
As our student communities become increasingly diverse, the college process becomes increasingly complex. This session will explore the specific challenges and rewards of working with different student populations including: students of color, LGBTQ students, athletes, development cases, first-generation students, adoptive parents, multi-marriage families, and colleagues’ children. This session will be more reflective than prescriptive; please come ready to share your own insights and stories.
Supporting Students with Disabilities - High School through the College Transition and Beyond  
(BARROWS, PEREIRA)  
*Room: Plymouth*  
*Most relevant to: Higher ed participants, secondary school participants*  
Navigating the transition from high school to college can be difficult for many students, and in particular for students with disabilities. Both the needs of students and the accommodations process can differ when students apply for and enter college. This session will view the accommodations process as a continuum, and focus on the importance of ensuring that students know what to expect in order to manage their independence in college (both academically and residentially). The session will also discuss accommodations on College Board tests, including documentation guidelines and the request process for tests such as the SAT, PSAT/NMSQT and AP.

Women's Leadership  
(DE LUCA, HERNANDEZ, ISHOP MARINACCIO)  
*Room: Duxbury*  
*Relevant to all*  
- Are there any common characteristics of women leaders?  
- How did you find mentors? What do you look for in a mentor?  
- How has your life trajectory been affected by choices you've made in your career?

1:15pm-2:45pm (Breakout sessions - 3 options)

Developing Retention Practices Focused on Diverse Student Populations  
(BARTZAK-GRAHAM, FERNANDEZ, McNAMEE)  
*Room: Plymouth*  
*Most relevant to: Higher ed participants*  
As Boston's most diverse university, we understand that a one-size-fits-all approach to retention does not work. Therefore, we have established retention programs and practices to address the unique needs of some of our key populations: sophomores, first-generation/low-income students, and students with disabilities. In this session you will learn what the University of Massachusetts is doing to retain these students and help them successfully progress towards graduation. All are welcome for a lively discussion about what is happening at UMass Boston, and an opportunity for the audience to share programs that are having an impact on their campuses.

“Soft Skills” for a Tough World: Shifting Our Students’ Metacogs Into Gear  
(CHENG DODGE, SKINNER)  
*Room: Martha’s Vineyard*  
*Relevant to all*  
With “grit” and “resilience” as the educational buzzwords of the day and with more and more research showing that a wide-ranging, nimble mindset is a prerequisite for success in this increasingly complex world, it is becoming clear that book learning by itself is not sufficient, that quantitative data like grades and test scores do not take the full measure of a student. This session will review some of the literature on more qualitative, so-called soft skills such as grit, resilience, character—including research by Dweck,
Duckworth, Tough, among others – and will look at the role these personal qualities (PQs) play in the college admissions process, in student success in college, and in career planning.

**Unrealized Impact: Examining the Current State of Diversity, Equity, and Inclusion in the Education Sector** *(ORTIZ)*

*Room: Duxbury*

*Relevant to all*

Research across many sectors has demonstrated the myriad benefits of diversity to organizational health and effectiveness. Diverse teams translate to higher rates of staff satisfaction and retention and more innovative ideas. In classrooms, Black and Latinx students taught by teachers who share their racial backgrounds benefit from a culture of higher expectations, fewer discipline referrals, and improved academic outcomes. And yet, the education sector as a whole is still far from reflecting the communities and students it seeks to serve. This session will explore data collected by Promise54 about the role of diversity, equity, and inclusion in education organizations by exploring the following questions: What are the racial and socioeconomic demographics of staff, leadership, and boards in education organizations? What are the policies and practices that education organizations employ in relation to diversity, equity, and inclusion so that diverse staff decide to stay in organizations? What are staff perceptions of diversity, equity, and inclusion in their organizations and of related practices and behaviors?

Join us to learn more about answers to those questions and what we are learning out in the field.

**3:00pm-4:30pm (Breakout sessions - 3 options)**

**The First Generation College Student Experience, From Application to Graduation** *(ROBERTS)*

*Room: Martha’s Vineyard*

*Relevant to all*

Dean Roberts will moderate a panel discussion of Boston-area first generation college students. Panelists will reflect on their experiences as first generation students in the college search and admission application + financial aid processes, and offer suggestions, advice, and perspective. They will also discuss the challenges (professional, financial, social, psychological, and academic) first generation students face once on a college campus, as well as personal triumphs.

**International Admissions** *(CHENG DODGE, McGANN)*

*Room: Plymouth*

*Most relevant to: Secondary school participants*

- How are international students considered in the admissions process of highly selective universities? What is the role of test scores like SAT/ACT/TOEFL; of geography/nationality; of financial need/ability to pay?
- How do admission offices recruit international students?
- What is the current campus climate for international students? What support systems exist?
- What are the latest trends in international admissions and enrollment? How can I stay up-to-date?
● What are practical tools international counselors can use to help students and families understand the US college process?
● How do we best counsel students who will apply to schools in a variety of countries?

Take Care: The Communal, Professional, and Personal Benefits of Timely, Well-Placed Selfishness
(SKINNER, ST. JOHN)

Room: Duxbury
Relevant to all
No one in college admissions would mistake the work for a walk in the park. The challenges to one’s health and even to one’s sense of self and integrity are real and often intense. This session will explore ways that we can keep head, heart, and soul together. How do you keep yourself whole? What do you do to stay loose? Present? Effective? Sane? How do you find and preserve your own space in this work? Topics will range from micro to macro, from health tips about sleep, nutrition, exercise, life on the road to strategies for managing social media to considerations of fit and career. Participants will be encouraged to share their own care-taking tricks of the trade.

4:30pm-5:45pm

Case Study Wrap-Up
Room: Grand Ballroom

FRIDAY, JUNE 28

*No programming. Thank you for attending, and for your work as an educator!
Travel safe and have a wonderful summer!*