

“HOW TO CONDUCT A SESSION 2 INDIVIDUAL CONFERENCE”

INSTRUCTOR’S GUIDE

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OVERVIEW

The session 2 individual conference is the follow-up session to the **“Everything You Need To Better Prepare for College”** seminar, and is designed for 3 purposes (in order of priority):

- **Improve the practical value of the program by providing a snapshot of current college plans and recommendations for specific action**
- **Promotion of AMEDF Scholars Program to fill any gaps in planning and encourage early & comprehensive college preparation**
- **Promotion of appropriate services of participating firms in the Alliance based upon the participant’s circumstances**

In conducting this session, it is important for the instructor to proceed with these purposes and priorities in mind. The session should be focused on the family’s needs and not become solely a solicitation session for the instructor’s business interests. This is important in order to maintain the integrity of the community education program in benefiting the public.

SESSION FORMAT

The session is to be conducted within a format conforming to the following:

1. **Disclosure and Participant Data Summary:** This form is to be provided to the participant prior to starting the session. This will provide a written disclosure of the purpose of the session and required disclaimers.
2. **Introduction and overview of the session:** Instructor should briefly introduce himself or herself and discuss the purpose of the session to determine an estimated EFC under the FM and IM and examine the family’s current college plans. Briefly disclose that instructor is being compensated by the AMEDF, and reference the AMEDF Resources folder.

Sample Script:

“I noticed here that you attended the AMEDF seminar on _____. Do you have any questions from that seminar? I’ll write them down and make sure we cover them in today’s session. (These questions can give clues to the prospects’ interest areas and will be helpful in making the summation and recommendations more personal and reduce objections)

Let me begin with a brief overview of today’s session. You may have noticed that besides serving as an instructor for the Foundation, I am also a financial advisor in private practice. My role today, however, is as an instructor of the AMEDF, so you are not here in a client capacity. I am being compensated by the Foundation for today’s session, which will last about 30 minutes.

You may recall from the seminar you attended that in today’s session, I’ll review your situation with regard to XXX’s college plans and take a look at his/her admissions profile development.

We'll also review whether you will have financial aid eligibility by estimating your EFC. This will give you a snapshot of your college plans so far and identify any areas of concern.

At the conclusion of today's session I'll give you a resource packet and make recommendations based upon our discussion. There is an evaluation form for today's session in the resource packet. It is very important that you complete and return this evaluation, since this information is used to validate this program to sponsors and ensure funding continues in the future.

As I mentioned, I am also a XXX...this background will be helpful when we start the discussion on financial fit. Feel free to ask any questions even if it doesn't appear related to today's session topics. I am here to help you as much as possible..."

3. Discussions on admissions and financial aid:

Discuss current academic progress, admissions and financial concerns of the family

a. Academic Progress and Admissions:

i. Academic Progress: High school, GPA, curriculum (AP, IB, honors, 4-yrs of science & math, etc.), rank, guidance involvement

Sample Questions/Discussion Points:

"How's XXX doing in school? Where does he/she go to school? Tell me about the courses he/she has taken, and ones coming up..."

(if a junior or senior) Do you have an approximate rank for XXX within his graduating class? Has he/she begun working with their guidance counselor on college prep? Tell me about what's been done....

Any worries or concerns about XXX's academic progress? Have you (parents) had any contact with the guidance office? Tell me about what's been discussed...

Any concerns about the guidance office?

ii. Testing: PSAT, SAT, SAT II, ACT

Sample Questions/Discussion Points:

"Has XXX taken any college admissions tests? Is he/she scheduled to take any tests coming up? How did he/she do? Has the guidance office discussed with you which tests may be appropriate? Are you familiar with the differences between these tests?"

iii. Extracurricular: Employment, sports, hobbies, recreation, positions of responsibility, volunteer work, purpose (motivation for involvement- search for leadership, commitment, achievement because many parents and students do not make the connection

between activities and the impact of those activities on college admissions, maturity, career suitability- EQ. Their lack of understanding in this area suggests a missing element in the student's emotional preparation for college, and indicates that the family will likely benefit from enrollment in the Scholars Program™)

Sample Questions/Discussion Points:

"Does XXX participate in any extracurricular activities? Why did he/she choose these activities? Do you feel these activities have been positive or negative to his/her development? In what way.... What about college...are these activities helping his/her commitment to college? In what way..."

iv. Career Interests: Field, geography, lifestyle, compensation, career profiling (when and how many times- single profiling vs. cycle approach), exposure (contacts)

Sample Questions/Discussion Points:

"Have you discussed going to college with XXX? Any idea what he/she wants to do as career options? Why..."

Has XXX expressed to you any preferences about where he/she eventually wants to work or live?

Is he/she looking to stay around here? What kind of work do you do? Has XXX expressed any interest in your field?

Has he/she been exposed to your line of work? Has XXX been profiled for suitable careers? When and where?

Have you reviewed the results with him/her? What concerns you about his/her career interests or lack thereof...

v. College Major: Relation to career interest, employment or graduate prep

Sample Questions/Discussion Points:

"Has he/she expressed which college majors he/she wishes to pursue in college? Tell me why..."

In relation to the career goals, has he/she looked at other suitable majors...Were these majors considered when his/her high school curriculum was planned?

Tell me about your feelings regarding these interests..."

vi. Colleges of interest: Relation to career and major, geography, setting, size, competitiveness in the field, recognition, nexus to future plans, sports, admissions competitiveness, price (transition for the Scholars Program™), exposure (contacts)

Sample Questions/Discussion Points:

"Has XXX expressed any interest in any particular college? Why?"

How do you feel about these choices? Which is the top choice...why?

Have you considered XXX's living on campus/leaving home?

Is name recognition a factor? Why? Have you and XXX visited any colleges?

Are any other factors being considered for college selection? Is price a parameter?

Tell me your concerns about college selection..."

b. Financial Aid:

i. Current budget and financial plan for paying college costs

ii. Parental employment and financing options

iii. Family finances and changes

Sample Questions/Discussion Points:

"Have you determined a budget for college costs? How much per year? Is that from income alone, or were you considering using assets?"

Any thoughts on using retirement assets now that tax laws have been relaxed? Any concerns on the budgeting side?

You mentioned you are employed at YYY...are there any college financing options or help from your employer?

4. Estimating the EFC

Sample Questions/Discussion Points:

*"I'll now estimate your Expected Family Contribution...Have you had this estimated in the past?
Tell me about that..."*

You'll recall from the seminar that the EFC is the minimum you will be expected to contribute for college, per year, based on your income and assets. I'll be using a customized version of a calculator based on an internet tool called the CPW Analyzer, a program provided by College Solutions Network, a partner firm to the AMEDF Alliance. I'll calculate it using the Federal Methodology and the Institutional Methodology so you will have both versions of your EFC...

Let's see, the year of income that will be used for XXX is the year prior to when XXX will enter college. Do you expect your income and assets to change in the near future? Any changes may skew today's result...

For the sake of privacy and licensing, I will not be printing a report for you to take, so you should write down these results. Also, we are prohibited from sharing your information with any outside entities to the AMEDF's College Access & Affordability Alliance.

Within the Alliance, we do collect this data for statistical tracking to determine the profile of families being serviced in AMEDF Programs, and also to determine how to better help families like you in your college preparation.

(Input financial data and generate results) How do you feel about this number...

5. Evaluation of college admissions and financial aid

Sample Questions/Discussion Points:

“Now that we have your EFC and XXX’s academic profile, let’s take a look at these colleges and see how they fit your situation...”

Let’s take a look at the admissions profile of ZZZ college and how it compares to XXX’s profile....(compare SAT/ACT ranges, admissions factors & priorities, GPA, admissions rate, freshman profile and success factors). Looks like there are some missing pieces to determining XXX’s chances of getting admitted...

Let’s take a look at the financial aid picture...(compare EFC to cost to determine need, then compare need to avg aid pkg, ratio of gift aid, % needy students with full need met, preference items, avg. indebtedness)...Looks like there is a low/high probability that aid will be awarded...

(if time permits) Let’s look at some other factors like major and career fit....(compare major and % of degrees awarded, campus setting)...Looks like there are other items that you will need to consider...

6. Recommendations

a. Additional Programs:

- i. CSN
- ii. AMEDF Scholars Program
- iii. Advisor's Services

Script:

"Based upon our discussions today, let me make some recommendations that should fill in the holes in your current college plans..."

b. CLOSE OPTIONS:

i. CSN On-Line Account: CPW Analyzer

Script:

"As mentioned in the seminar you attended, the Alliance has organized various resources to help you in your college plans. My job today is to advise you on which of these resources are available and fits your needs.

One of the partners of the Alliance is College Solutions Network or CSN, an approved Federal education loan provider. Most students will be taking loans to pay for college, and through the AMEDF Alliance CSN has agreed to provide participants in AMEDF programs additional resources through an on-line tool called the Analyzer and the Education Resource Center...(discuss specific resources off the Analyzer & AMEDF ERC that fits the need of the family like SAT prep, loan modeling, debt payment calculators, etc.)

This introduction to CSN is beneficial because CSN wants you to get familiar with the types of loans available so that when you are ready, you can easily submit your loan application through CSN and be ready to handle college expenses without delay. In exchange, CSN will make a contribution to the local AMEDF chapter to help us engage and help more families.

I will forward your data to CSN after today's session. CSN will be contacting you when your on-line account is ready for use.

"

ii. Scholars Program™:

Script:

CAREER FOCUS:

looks like XXX really needs more focus and handholding on thinking through the career component. The Foundation has a tuition based program that has a component that will help XXX take the right actions to evaluate options and determine the right career path. This is essential to clarifying the appropriate major and college choices to explore. Would XXX can benefit with more guidance? Here's why I am recommending this program....

COLLEGE FOCUS:

looks like XXX has some idea what he/she wants after college, but choosing the right college still needs a lot of work. The Foundation has a tuition based program that has a component that will help clarify and find the right colleges to explore...

FINANCIAL FOCUS:

looks like you are missing some important pieces to the financial puzzle of whether and how to afford the right college choice for XXX...Let me recommend a program that will help you sort through this financial puzzle...

COMPREHENSIVE:

*looks like many/most of the pieces of this puzzle are missing, including career choices, academic preparation, choosing appropriate majors, finding the right college choices, and developing a financing plan...these all need work. Let me recommend this comprehensive program the Foundation has made available to a limited number of students called the **Scholars Program** □...this program encompasses all of these trouble areas, and also comes with individual planning conferences with a program advisor to help you connect the dots. Enrollment is very limited, however, because of the comprehensive nature of the program...*

PULL BACK:

there are two obstacles to the Foundation's Scholars Program™: you must actively participate by attending seminars, and enrollment is limited due to funding constraints. Although the Scholars Program™ is tuition-based, the tuition is heavily discounted due to donations collected and cost reductions the Foundation has negotiated. So if you are interested, I urge you apply right away by either mail or via the Internet. If there are slots available you will be enrolled. I am also participating in this program as a Program Advisor, so you can ask for me as your instructor on your application. It won't get you admitted sooner, but if you are admitted, you will be assigned to my group of students...

TIME:

here is the upcoming seminar schedule...looks like you need to apply by mm/dd in order to be able to attend these upcoming session...

iii. Advisor's Services:

Sample Questions/Discussion Points:

"Based upon our discussion, I believe you should seek professional assistance with the financing aspect of XXX's college plans. Are you working with a financial advisor knowledgeable in this area?"

Have you discussed your concerns with other advisors, or interviewed other advisors about college planning?"

This happens to be my specialty, and I think I can help you. However, because I'm working with you today in the capacity of an AMEDF instructor, it isn't appropriate for me to speak with you directly in a client capacity.

If you are interested, I can have my office contact you to schedule another meeting to work with you directly after today's session is concluded. We can discuss (specific issues uncovered) at that meeting and I can get a better idea of how to help you.

My office can also provide you with a referral to another financial advisor skilled in this area if you would prefer. Either way, you should work with someone on this issue right away before it ends up (costing you the extra \$XXX...)

As we discussed, our working together on your financial issues is obviously outside of the scope of today's session and the Foundation's programs. Let's schedule another meeting to discuss these issues in more detail sometime next week. What I'll need is...

7. Session Closure:

- a. **Evaluation:** Stress the importance of returning the evaluation form to validate program's value to sponsors
- b. **Resource folder:** Reference programs recommended and how to enroll
- c. **Further contact:** Get permission for future contact via email and other means

Script:

"As we discussed, I believe the _____ will help you with what you need. I can also have the Foundation send any updated materials that may be helpful in this area if you list your email...is this the email to send any updates?"

*****Instructor completes AMEDF database! This data is used to track participants in AMEDF programs and progress of services being provided. Based on participant's responses, additional resources will be made available to them via email and mail at appropriate times during the year.**

Instructor fees will also be paid based on this database, so completion of relevant data in a timely manner is essential.

SESSION MATERIALS

1. **Disclosure & Participant Data Summary**
 - o Used to collect family data and written disclosure

2. **AMEDF Database Manual**
 - o This manual provides details on how instructors should update this database after each session. Each instructor is assigned a user name and password by the AMEDF

3. **Session 2 Individual Conference Checklist**
 - o Used to collect data quickly and pinpoint areas of concern

4. **Electronic Tools:**
 - o **CPW Analyzer** FM & IM EFC calculator spreadsheets
 - o **MyRoad** is the primary college database for admissions and financial aid information. Each instructor will be assigned a user name and password by the AMEDF upon certification
 - o **AMEDF Education Resource Center** for SAT prep, scholarship search

5. **AMEDF Resources Folder:**
 - o Session 2 Evaluation Form
 - o AMEDF Scholars Program brochure & Application
 - o AMEDF information inserts
 - o CSN Analyzer materials
 - o Consumer Information Catalog