



AISAP + Clarity 2026 FINANCIAL AID SUMMIT

Together, AISAP and Clarity are bringing admissions and enrollment professionals a collaborative learning experience designed to address the evolving challenges of affordability, access, and financial sustainability in independent schools.

12:10 PM – 12:15 PM ET **Welcome**

12:15 PM – 1:15 PM ET **Session 1**

2027 Financial Aid Forecast: What Every School Needs to Know

Amada Torres - VP for Studies, Insights, and Research, NAIS

CONCURRENT SESSIONS

1:20 PM – 2:20 PM ET

1. Financial Aid 101

2. Planning the Season: Understanding the Cycle and Developing a Communication Plan

3. Award Lifecycle: Where They Live, How They're Shared, and Who Oversees Them

2:20 PM – 2:30 PM ET

Break

CONCURRENT SESSIONS

2:30 PM – 3:30 PM ET

1. The Family Journey: Building Financial Aid Processes Families Can Navigate

Jennifer Sheppard - Client Success Manager, Clarity

Christina Townsend Hartz - Director of Admission & Financial Aid,
University School

2. Financial Aid & Enrollment: Connecting Aid Decisions to Institutional Goals

3. Scholarship Granting Organizations (SGOs) Under the Federal School Choice Program: What is it?

Drew Cocco - Vice President of Client Experience, Clarity

Shaka Mitchell - Senior Fellow, American Federation for Children

3:30 PM – 4:30 PM ET

Scholarship Granting Organizations (SGOs) Under the Federal School Choice Program: Beyond the Basics

Shaka Mitchell - Senior Fellow, American Federation for Children

DAY 2

12:10 PM – 12:15 PM ET

Welcome

12:15 PM – 1:15 PM ET

The Financial Aid Dashboard: Metrics Every School Should Know

CONCURRENT SESSIONS

1:20 PM – 2:20 PM ET

1. The Hardest Financial Aid Conversations

Christina Townsend Hartz - Director of Admission & Financial Aid,
University School

2. The Role of Financial Aid in Strategic Enrollment Management

3. What do I do with This? Reading Difficult Files

Break

2:20 PM – 2:30 PM ET

2:30 PM – 3:30 PM ET

1. Beyond Tuition: Measuring the True Cost of Access

Jonathan Hochberg – Client Success Manager, Clarity

2. Where Financial Aid Methodology Meets Mission

3. Raising the Visibility of Your Financial Aid Program

3:30 PM – 4:30 PM ET

AI Meets Financial Aid: Responsible Automation in the Office

Dr. Andrew Greene, Ed.D., CEO & Co-Founder, Independent Data Partners

Flynn Corson, Co-Founder & President, Independent Data Partners

Learning Objectives:

- Evaluate emerging financial aid and affordability trends and their implications for independent schools, families, enrollment, and institutional sustainability.
- Strengthen financial aid operations and processes by identifying opportunities to create clearer, more efficient, consistent, and family-centered practices.
- Use financial aid data to inform strategic decisions related to aid allocation, enrollment, retention, yield, and net tuition revenue.
- Navigate complex family circumstances and difficult financial aid conversations with greater consistency, empathy, and sound professional judgment.
- Develop strategies for using technology and AI responsibly in financial aid, while maintaining appropriate human oversight, privacy, equity, and trust.
- Understand the role of Scholarship Granting Organizations (SGOs) under federal school choice programs, including compliance and recordkeeping requirements and strategies for building strong, sustainable SGO partnerships.