

NYSFAAA Conference 2023 Agenda

Tuesday, October 10, 2023

Room

12:30- 3:00pm	Preconference training- NASFAA Module- Professional Judgement (pre registration required)	Salon
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This session will cover all the various areas of PJ including the explicit and implicit guidelines for exercising discretion using (PJ) in matters related to dependency status, need analysis, and student or parent Federal Direct Student Loan (Direct Loan) Program eligibility. We will also cover how you can protect the integrity of the Title IV programs by ensuring your school's policies and procedures related to the exercise of PJ authority are reasonable and applied consistently, resulting in the equitable distribution of financial aid funding.

Presenter:

Catherine Boscher-Murphy, Associate Director/Compliance Officer, Montclair University

12:30- 3:00pm	Preconference training- TAP Processing 101 (pre registration required)	Salon
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This session will provide an overview of TAP eligibility and certification. We will cover basic student eligibility to the criteria schools need to review to certify students, including Ability-to-Benefit, Full-time Status, and Good Academic Standing. We will review HESCweb screens and reports so schools can see what tools are available to help them with the certification process.

Presenter:

Michael Turner, Client Relations Manager, HESC

1:00-5:00pm	Vendor Set Up	Foyer
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3:00- 5:00 pm	Registration Open	Foyer
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6:00- 8:00 pm	Ghost Tour- NYS Capital (pre registration required)	Meet in Hotel Lobby
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Wednesday, October 11, 2023

8:00- 12:30pm	Registration Open	Foyer
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9:00- 12:30pm	Vendor Area Open	Foyer
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10:00- 11:15am

Key Note- We See You: Compassionate Financial Aid Practice in the New Normal

Salon E- H

The demographic of today's college student in all sectors of higher education is shifting rapidly. Under-resourced, first-generation, and student-parents now comprise the majority of students entering college. For our institutions to be "student ready", we need to understand, engage, recognize, and build a systems-approach to our work that focuses on empathy, relationship-building, and anti-poverty efforts. When we incorporate a social justice lens, financial aid and financial literacy transforms into equity work. If education is the practice of freedom, how can we imagine our financial aid and wellness responsibility as the key that unlocks that door for our students. Today's uncertain economic climate is tightening its grip on our students, and understanding the socioeconomic challenges facing them has never been more critical. This session will focus on understanding the WHAT and WHY of the student populations that need us most while examining how we can build transformational services, teams, and strategies that make students visible, build on their strengths, and increase persistence and retention.

Presenter:

Jason Zelesky, Interim Vice President of Student Service and Dean of Students, Mount Wachusett Community College

11:30 - 12:30pm

HESC-CRS Reports

Salon A

This session will cover the certification process for New York State awards that appear on HESC's Consolidated Scholarship Roster. We will cover how to review and fill in the roster, including determining eligibility for special scholarship programs, understanding cost of attendance budgets and the Consolidated Scholarship remittance process.

Presenter:

Michael Turner, Client Relations Manager, HESC

Expectations versus Reality

Salon B

While most families agree that college is an investment in their student's future, many are confused and stressed about paying for that education. In this session we explore what college-bound high school families know and expect about paying for college, and how that compares to the realities experienced by *currently* enrolled undergraduates. We will investigate how families' understanding of available funding sources, attitudes and behaviors change as families begin and follow their higher education journey. The insights shared are based on both the College Confidence: What America Knows About Paying for College and How America Pays for College 2022.

Presenter:

Chris Earnshaw, Director of Relationship Management, Sallie Mae
Stephanie Stock, Director of Relationship Management, Sallie Mae

Financial Aid & NCAA Athletics Rules

Salon C

General Overview of the relationship between financial aid and athletics. With an emphasis on the communication that must exist in order to ensure a positive experience for student athletes.

Presenter:

Scott Khare, Associate Director of Student Financial Services and Veteran Affairs, Marist College

Federal College/Work-Study Reporting

Salon D

Join NYSFAAA's Renee Nunziato, Toya Pigford and Lucila Villaquiran in a school panel as they discuss the post-pandemic Federal Work Study hiring challenges from hiring to new reporting requirements. Three different colleges (SUNY, CUNY, Private College) perspectives on getting back on track with boosting student participation. The discussion will include different initiative examples that these colleges are doing and some suggestions that you can take back to your office. The session will conclude with how colleges are handling the new FWS reporting requirements.

Presenters:

Renee Nunziato, Campus Director of Financial Aid, Suffolk Community College
Toya Pigford, Student Development & Enrollment Management, Hostos Community College
Lucy Villaquiran, Executive Director of Financial Aid Compliance, Monroe College

12:30 - 1:45pm

Lunch and President's Welcome

Salon E -H

2:00- 4:30pm

Registration Open

Foyer

2:00 - 5:00pm

Vendor Area Open

Foyer

2:00 - 3:00pm

50 Ways to Lead Your NYSFAAA

Salon A

This session will describe all of the ways in which members can serve NYSFAAA regardless of their years in the industry and within NYSFAAA itself. There is a role for the introvert and the extrovert and everyone in between. Please join me in learning more about NYSFAAA service opportunities.

Presenter:

Keri Edsall, Financial Aid Counselor, Alfred State
Renee Swift, Assistant Director, St. John Fisher University

Navigating Google Suites

Salon B

This session is for anyone looking to become more efficient in navigating Google Suites and learning the secret to finding more time in your day. We will discuss ways to enhance your everyday tasks with the help of technology. We all use technology every day, but are you using it to its fullest potential? Do you find yourself overwhelmed with the options? Are you often confused on which app to use for what task? Do you find yourself lost trying to find a document or spreadsheet you were sure you saved? Have you ever done a productivity audit on yourself?

If you answered "YES" to any of these questions this session is for you! Join me

Presenter:

Karolina Holl, Director of Financial Aid, Utica University

Adveting Danger: Combatting Fraud in Higher Education, Financial Aid, and Student Credit Salon C
What You Can Do To Control Your Own

The session will discuss the startling sophistication of Higher Education fraud, credit industry mitigants, and campus-wide best practices for deterrence. Attendees will gain an understanding of the:

- Alarming scope of enrollment and financial aid fraud.
- Frightening emergence of synthetic fraud – “ghost” identities combining real and fake information.
- Devastating consequences of fraud on students and families.
- Call to action: industry recognition of trends and tips to detect fraud on campus.
- Technologies, collaboration, and tools to help prevent fraud.

Presenter:

Jennifer Sommerman, Head of Campus Development – Northeast, College Ave Student Loans

How Institutions Handle PJ

Salon D

A panel discussion of PJ (Professional Judgement) requests and how different institutions decide whether or not to make adjustments to aid.

Presenters:

Rochelle Filler, Assistant Director of Financial Aid, RPI
Renee Nunziato, Campus Director of Financial Aid, Suffolk Community College
Nick Prewett, Director of Financial Aid, Stonybrook University
Dan Robinson, Campus Director – Financial Aid, Pace University

3:00 - 3:30pm

Break

Foyer

3:30 - 4:30pm

Veterans Educational Benefits

Salon A

A general overview of veterans educational benefits, as well as the support given to veterans on your campus through best practices.

Presenters:

Scott Khare, Associate Director of Student Financial Services and Veteran Affairs, Marist College

Connections Between Financial Aid and HEOP/EOP

Salon B

Panel to discuss the relationship between financial aid and NYS Opportunity Programs.

Presenter:

Tony Bonilla, Director of EOP, SUNY New Paltz

Cheryl Hamilton, Associate Vice Chancellor for University Life, Opportunity Programs, and Student Advocate, SUNY System

KL Lane, Director of the HEOP & AHANA program at Le Moyne College

Sade Moore, Program Officer- HEOP, State Education Department

SAP: The Ins, Outs, and Best Practices**Salon C**

Satisfactory Academic Progress (SAP) is a vital, yet flexible regulation that can often be met with confusion due to all the "gray" At this session, we will talk about the basics of a good SAP policy, and discuss the "musts" and "shoulds" of your own campus SAP process.

Presenter:

Sean Sherwood, Associate Director of Financial Aid at Binghamton University

Work-Study Students: How They Can Help the Office**Salon D**

Work-Study students are a extremely valuable part of the financial aid office. This session will discuss ways you can assist your federal work-study students in making connections between what they learn through their work and how it connects to skills that employers are seeking. All at the same time of assisting the office with work-load issues.

Presenter:

Lyndsay Johnson, Senior Financial Aid Advisor at Stony Brook University

5:00 - 5:30pm

New Member Reception**Empire**

5:30 - 6:30pm

President's Reception**Empire**

6:30pm

Dinner on your Own

8:00-9:00pm

Entertainment

9:00-11:00pm

Evening Entertainment**Chats****Thursday, October 12, 2023**

7:00-8:30am

Morning Walk/Run in The Crossings Park**Meet in hotel lobby**

8:30- 12:00pm	Registration Open	Foyer
8:30 -12:00pm	Vendor Area Open	Foyer
8:00 - 9:00am	Breakfast	Salon E -H

9:00 - 10:00am	FAFSA Simplification Pt1	Salon A
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An in-depth overview of FAFSA Changes, new methodologies, and operational guidance received to date from Federal Student Aid.

Presenter:

Sonya Griggs, Director of Grants and Scholarships, HESC

Loan Quiz Show

Salon B

Wondering if you are prorating loans correctly? Do you know what to do when a borrower's loan amounts are in unequal disbursements? In this Q&A-style webinar, we will test your knowledge on key aspects of the Direct Loan program and share guidance NASFAA received from the U.S. Department of Education. Explore some of the most frequently asked questions related to packaging, originating, and disbursing federal Direct Loans received by our NASFAA AskRegs service. (Note: Return of Title IV Funds or Verification or Student Eligibility can be substituted as the focus for this session.)

Presenters:

Dana Kelly, Vice President of Professional Development and Institutional Compliance, NASFAA

Roundtable: Graduate and Professional

Salon C

This is a roundtable discussion focused on issues relevant to professionals who are responsible for administering financial aid for graduate and professional programs and schools. Topics will include enrollment management, student cost of attendance items, PSLF and other debt management issues, the restart of loan repayment, potential impact of FAFSA simplification, serving low income/first generation students/international students, as well as other topics raised by session attendees. Be prepared to listen, learn, and share your thoughts and concerns during this interactive forum.

Presenter:

Darrin Rooker, Director of Financial Aid, Northeast College of Health Sciences

Verification, Shmerification

Salon D

Let's discuss what impacts FAFSA Simplification will have on verification. While we are in the midst of verification for 2023-24, what do we know about verification for 2024-25?

Presenter:

Renee Swift, Assistant Director, St. John Fisher University

10:00 – 10:20am	Break	Foyer
10:30 - 12:00pm	Inside the Beltway	Salon E-H

This NASFAA Federal Update will provide an overview of the latest happenings in Washington, including a high-level landscape of the current political climate in D.C. with a focus on federal financial aid policy and how it has impacted students and institutions in recent years. Overall trends in student aid will be discussed including recent legislative and regulatory activity, reauthorization proposals and predictions for how student aid funding will fare in future budget negotiations. Movement within the Department of Education concerning negotiated rulemaking and updates from Federal Student Aid (FSA) will also be discussed. The session will also provide an overview of NASFAA-led projects, services, and advocacy efforts.

Presenter:

Justin Draeger, President and CEO of the National Association of Student Financial Aid Administrators, NASFAA

12:00 - 2:00pm	LUNCH, Regional Awards EASFAA Remarks, Dr. Danette Burgess, EASFAA President	Salon E - H
2:00 -4:00pm	Vendor Area Open	Foyer

2:15 -3:15pm	Return of Title IV Funds-R2T4	Salon A
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Overview of the R2T4 calculation steps and address important concepts and time frames that take place throughout the R2T4 calculation. Topics include withdrawal dates, dates of determination, post-withdrawal, and disbursements.

Presenter:

Greg Rinderle, Director - Financial Aid Compliance Audits, McClintock & Associates

Meaningful Connections: What Your Student Outreach Efforts Need to Increase Student Retention & Persistence	Salon B
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New students, returning students, stop-out students, non-completers...they all have personal, meaningful reasons for pursuing education and, most likely, all face barriers to reaching the finish line. Maybe it's money; perhaps it's lack of clarity regarding next steps, or just the way life sometimes happens. But by creating connections, getting to the root of what's holding them back, you can create measurable change in seeing these dreams fulfilled.

Presenter:

Tami Gilbeaux, Assistant Vice President, Inceptia

Succession Planning

Salon C

Per NASFAA's 2023 Leadership Conference, Succession Planning Pathway: Succession Planning has been identified as a vulnerability within institutions. The pandemic opened the curtains and we're seeing this "great resignation."

I will use what I learned at the NASFAA Conference to help you identify critical positions, the competencies and skills needed for these positions, and the resources available. A strategic succession plan may need to include promoting existing staff, and/or recruiting new staff. Whether it is to have back-up when you are out on vacation, out ill, or planning to retire, Janice will provide tips and best practices so you can take away a template or shell of a succession plan that you can take back to the office and continue to build your own succession plan.

Note: this session will also be helpful if you are participating in your state or regional organization.

Presenter:

Patti Donahue, Director of Financial Aid Operations, Binghamton University, NYSFAAA President

Janice Hilbrink, Director of Endowed Scholarships and Financial Aid Training Institute, Pace University

FAFSA Simplification Pt2 (open discussion)

Salon D

Part 2 of the FAFSA Simplification, along with a continued an in-depth overview of FAFSA Changes, new methodologies, and operational guidance received to date from Federal Student Aid – we will have an open forum for questions.

Presenter:

LaSonya Griggs, Director of Grants and Scholarships, NYS Higher Education Services Corporation

Gene Rogers, Senior Financial Aid Counselor, Molloy University

3:15-3:45pm

Break

Foyer

4:00 - 5:00pm

Top AskReg Questions

Salon A

Updated for 2023-24! NASFAA's AskRegs service fields thousands of questions from aid administrators each year. This session takes a look at the top questions submitted over the last year, as well as those rated as most useful by the NASFAA membership. Find out what your colleagues are asking and if your practices align with NASFAA responses.

Presenter: Dana Kelly, Vice President of Professional Development and Institutional Compliance NASFAA

Financial Aid Director's Panel

Salon B

A panel of FA directors will be available for attendees to ask their riveting questions. A brief introductory statement is to be provided by each member of the panel, and then we will open up to general questions.

The goal is to engage attendees so that we can have a positive and valuable exchange.

Presenters:

Shalena Clary, Senior Director of Financial Aid, SUNY Corning Community College

Patti Donahue, Director of Financial Aid Operations, Binghamton University, NYSFAAA President

Darrin Rooker, Director of Financial Aid, Northeast College of Health Sciences

Brian Smith, Director of Student Financial Services, SUNY Cobleskill

Understanding Credit and Private Student Loan Underwriting

Salon C

Provide guidance with insight into the impact of credit and considerations to help reduce the cost of education.

Presenters:

Ray Sykes, Vice President, Relationship Manager, Citizens Bank

The Effects of Modular Based Programs

Salon D

Any course in a program that does not span the entire length of a payment period or a period of enrollment is considered to be a module. This session will explain how to administer Title IV aid when your academic calendar contains modules and what to do in the case of student withdrawal.

Presenter:

Greg Rinderle, Director - Financial Aid Compliance Audits, McClintock & Associates

4:00 pm

Vendor Break Down

Foyer

5:30 - 6:30pm

Cocktail Reception

Foyer/Salon E-H

6:30- 8:30pm

Awards Banquet

Salon E - H

8:30pm

Entertainment

Chats

Friday, October 13, 2023

8:00 - 9:00 am

**Breakfast, NYSFAAA Scholarship
NYSFAAA Business Meeting**

Salon E - H

9:00 -10:00am

Communication & Listening Skills

Salon A

This fun and interactive session will focus on exercises that enhance listening and communication skills. It has been noted that the most neglected skill in communication is listening. We will provide you with tools to understand your individual communication style, and ways to effectively utilize listening as a communication tool.

Presenter:

Julie Lawton, Regional Manager, Monogram Personalized Student Loans

How to Leverage Social Media to Increase Student Engagement

Salon B

With calls, email, texts, letters, and tweets, you might wonder how students still miss your messages. Students are overstimulated and if you want your message to be heard, you have to think like a social media company. Here, you will find the tools you need to engage your students on their terms and make your message heard.

Presenters:

Tim Young, Director of Campus Partnerships, Earnest Student Loans.

Patrick Ziegler, Sr. Account Executive, Campus Partnerships, Earnest Student Loans.

A Campus-Wide Approach to Aid-Eligible Coursework

Salon C

This will be an interactive discussion on best practices for campus wide implementation of aid-eligible coursework. We will discuss: departmental involvement and cross-training (advising, registration, financial aid); gathering support from campus administration; and optimizing software utilization. We will also cover the importance of clear and transparent communications with students, timely notifications and availability of advising.

Presenter:

Kerry Lubold, Interim Director of Student Financial Services, SUNY Plattsburgh

The 7 Disruptors to a Virtual Office and How to Overcome Them

Salon D

Gen Z is the most cost-conscious and debt-averse generation ever. This makes the financial aid office one of the most critical functions of today's modern campus. However, the student financial experience has been disrupted. And financial aid teams are buried in new administrative tasks. Staying on pace with Gen Z and all students requires tools that will increase enrollment, retention and staff satisfaction, putting student financial success at the forefront of your institution. In this session, you'll learn about the top disruptors to student success. And you'll learn exactly what you need to do to change the score for your students and your financial aid team.

Presenter:

David Harris, Account Executive, Ellucian

10:00 - 11:30am

HESC and State Education Department Updates

Salon E - H

NYS Higher Education Services Corporation and The State Education Department will provide a brief review of updates for NYS financial aid programs followed by HESC providing an update of new initiatives.

Presenters:

Sara Duprey, Associate in Higher Education Opportunity Program Officer, NYS Education Department

Christopher Fernando, Supervisor of Higher Education Programs, NYS Education Department

Lasonya Griggs, Director of Grants and Scholarships, NYS Higher Education Services Corporation

Clarissa Hartzog, Foster Youth College Success Coordinator and Campus Liaison, SUNY

Lisa Simpson, Director of College Services, NYS Higher Education Services Corporation