



## **NYSFAAA 2024**

### ***Program Session Descriptions***

#### ***Monday, October 28, 2024***

##### ***NASFAA Professional Credentialing—Federal Pell Grant***

**Presenter:** Samantha Veeder, Associate Vice Provost of Enrollment Management, University of Rochester

NYSFAAA is excited to provide the opportunity for NASFAA Credentialing to the membership. Participants will experience the following learning objectives and be eligible to take the exam:

- Introduction to the Federal Pell Grant Program
- Selecting the Appropriate Formula: Term Based Programs
- Selecting the Appropriate Formula: Clock Hour & Nonterm Credit Hour Programs
- Additional Considerations that affect Federal Pell Grant calculations

#### ***Tuesday, October 29, 2024***

##### ***Power In The Pivot***

##### ***Opening Speaker—Michael Fancher***

CEO & Founder MindFit USA

Through the lens of the “Four P’s” – PURPOSE, PAIN, PURSUIT AND PIVOT, this presentation dives deep into the journey of overcoming adversity and harnessing the power of pivoting in life. Attendees will be inspired to endure their hardships and to view their struggles through a lens of opportunity. For more information visit: [www.mindfitusa.com](http://www.mindfitusa.com)

##### ***Proper Management of Federal Tax Information***

**Presenter:** Robert Weinerman, Director of Training, Iron Bridge Resources, LLC

In the FUTURE Act world, when we receive ISIRs, we will receive data that is owned not by the applicant, but by the Internal Revenue Service (IRS). This data will not be considered “FAFSA data” and is governed by a stricter, and more limiting set of rules related to its display, use, and distribution. In this session, we will look at how Federal Tax Information (FTI), the data in the ISIR that is owned by the IRS, differs from other data in the FAFSA. We’ll cover the rules for

labeling and displaying it, using it, and sharing it with colleagues within our institutions and redisclosing it to entities, where permitted, outside of our institutions.

### ***Navigating Military Education Benefits***

**Presenter:** Lori Bartkovich, Veteran Specialist, Monroe Community College

This workshop will focus on military educational benefits, how these benefits work or do not work with financial aid, and how to properly advise course schedules to optimize VA/Financial Aid eligibility (predominately coming from a Community College perspective).

### ***Community Based Organizations – Your Partner in Filling Financial Aid Gaps***

**Presenter:** Judy Hernandez, Senior Manager, 1199SEIU Child Care Corporation

Join this session to understand examples of how financial aid administrators can work with CBOs to help students in need to fill deficits in student financial need.

### ***Little Light of Mine***

**Presenter:** Renee Swift, Assistant Director of Financial Aid, St. John Fisher University

We all know them. Heck, we may be one of them ourselves. We know people who bring light and those who take light. Join me for this session to talk about Illuminators and Diminishers and how we can be the light that we want to see in our offices.

### ***Enhancing Customer Service Excellence in Financial Aid***

**Presenter:** Lyndsay Johnson, Associate Director of Financial Aid, Stony Brook University

In an increasingly digital world, providing exceptional customer service to students and their families is more crucial than ever. Are you and your staff equipped to meet the diverse needs of different generations, socioeconomic backgrounds, and students shaped by the COVID era? This session will focus on honing essential customer service skills and offering practical tips to help ensure that all students and families feel supported and at ease.

### ***Potential Threats Facing Institutions of Higher Education***

**Presenter:** Jason Thomas, Special Agent, U.S. Department of Education, Office of the Inspector General

An overview of the OIG background and mission, fraud indicators and trends, case studies of internal and external fraud targeting Title IV Institutions, and proper reporting procedures.

### ***Financial Aid Bingo***

**Presenter:** Dr. Melissa Vargas, Assistant Director of Financial Aid, Mount Sinai Phillips School of Nursing

As a means to take a break from all of the informative sessions, participants will gather to play a round or two of financial aid bingo. Bingo winners will win prizes.

### ***Enrollment Management Trends & FAFSA Simplification***

**Presenter:** James Nowak, Financial Aid Compliance & Process Improvement Officer, Arbol

This session will dive into the complicated launch of the 2024-2025 FAFSA, and its impact on enrollment management nationwide. We will discuss the impact that FAFSA delays had on students and their ability to make informed financial decisions, as well as the fallout for financial aid and admissions offices attempting to have the cost conversation without comprehensive financial aid packages in order. We will also discuss the new FAFSA form and process, and how enrollment managers can best prepare for 2025-2026 and beyond.

### ***Managing Change & Cultivating the Next Generation of Leaders***

**Presenter:** Ray Nault, President & CEO, College Aid Services

In times of uncertainty and upheaval, the ability to manage change effectively becomes crucial for individuals and organizations alike. This session aims to equip attendees with valuable insights, practical strategies, and a positive mindset to navigate through challenging transitions with resilience and adaptability. Through interactive discussions, real-life case studies, and experiential exercises, participants will gain the tools they need to thrive amidst change and uncertainty. This session is also intended for enrollment and financial aid leaders that are seeking a way to create a pathway for the next generation of leaders. This is an interactive presentation and participants will be combined into groups to perform a group activity - the Marshmallow Challenge (<https://www.marshmallowchallenge.com>).

### ***How Monroe Community College Provides Emergency Assistance***

**Presenter:** Jeffrey Ferrara, Assistant Director of Financial Aid & Meryll Pentz, Financial Aid Counselor, Monroe Community College

MCC has a process of providing emergency assistance to students, we utilize both gift cards on demand, check payments, and other purchases for students. It requires a meeting with a financial aid advisor, a dynamic form, recording in banner, and other criteria. This has been a process that has evolved over a few years and we can share some of our trials and tribulations for schools looking to provide this kind of resource for their students.

### ***Professional Judgement Pitfalls & Best Practices***

**Presenter:** Thomas Dalton, AVP Northeast, Edamerica

This session will focus on the Statutory Authority of the Higher Education Act that provides financial aid administrator to exercise discretion to perform Professional Judgment (PJ). The session will examine all areas FAD's have discretion to make a PJ as well as look at best practices and common pitfalls aid administrator make.

### ***Financial Aid & NCAA Athletic Rules***

**Presenters:** Joe Weglarz, Director of Financial Aid & Scott Khare, Associate Director Student Financial Aid Services, Marist College

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 athletics.

***Wednesday, October 30, 2024***

***From Procrastination to Productive: 5 Secrets to a Bulletproof Mindset***

**Presenter:** Michael Fancher, CEO & Founder, MindFit USA

In today's fast-paced world, where technology and social media dominate our daily lives, it's easy to fall into the trap of procrastination, often without even realizing it. This compelling workshop, "From Procrastination to Productive: 5 Secrets to a Bulletproof Mindset," addresses the core issue head-on: the impact of our digital lifestyle on our brain's dopamine levels and, consequently, our productivity and mental health. Through an engaging blend of insights and actionable strategies, this session promises to transform attendees from motivated procrastinators to masters of focus, productivity, creativity, energy, and life itself. The workshop will explore innovative approaches to balancing digital consumption, harnessing the benefits of physical activity, and leveraging environmental factors to boost efficiency and creativity. Prepare to embark on a journey that will not only decrease your screen time without the fear of missing out but also engage the full potential of your mindset to step into a more productive, fulfilled version of yourself.

***Connecting the Dots by Navigating SAP & Academic Advisement***

**Presenter:** Dr. Cristina Ortiz-Harvey, Director of Financial Aid, Guttman Community College  
This session will explore policies, strategies, and resources essential for educating students on the significance of why academic requirements are key to maintaining eligibility for financial aid through Satisfactory Academic Progress (SAP) standards. Discover how to empower students with the knowledge they need to succeed!

***Approaching DEI Work From The Inside Out***

**Presenters:** Tracy Archie, Chief Diversity Equity & Inclusion Officer, Regional Transit Service & Ebony D. Caldwell, Ed.D., CDE<sup>®</sup> Vice President, Diversity, Health Equity, Inclusion and Justine, Rochester Regional Health  
Please join us for a session highlighting how DEI Officers tackle the challenges and opportunities related to DEI, shifting the culture, setting policies, reviewing practices with community that center DEI and operationalize it and creating workplace environments that are inclusive, welcoming, and allow employees to feel a sense of belonging.

***We Are Not in Kansas Anymore: A Technicolor Approach to Affordability***

**Presenter:** Shawn Morrissey, Director of College Relations, MEFA  
Don't send your families down the yellow brick road to pay their college bill without their ruby slippers. Helping families cover the gap at your institution goes beyond providing a lender list in black and white on your financial aid website. Students and families need to be presented with all of their affordability options up front, in technicolor, at every step of their journey, from inquiring about your school to graduation. This interactive session will highlight quick and easy improvements you can implement as well as a comprehensive long-range approach to become your best Glinda and help families avoid costly decisions as they finance a college education.

### ***Re-engaging Student Borrowers: Starting over for the best possible outcome***

**Presenter:** Tim O'Donnell, Assistant Vice Present, Inceptia

As repayment has resumed, borrowers and schools will be dealing with a much different landscape of repayment than has been seen in past trends. The CARES Act has afforded some relief to all student loan borrowers by bringing them current and eliminating the need for payments. And that's helping your CDR, for now. Understanding the ramifications of a mass resume date on student loan repayment can help you understand the impact it may have on your student borrowers and your school. In this express session, we will talk about the challenges this presents for students and schools along with recommendations on steps to take to ease the strain.

### ***Succession Planning***

**Presenter:** Patti Donahue, Director Financial Aid Operations, Binghamton University  
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." Janice and I will use what I learned at this conference to help identify critical position, the competencies and skills needed for these positions, and the resources available.

### ***Financial Aid Scenarios: An Interactive Approach to Sharing Best Practices***

**Presenter:** Dr. Melissa Vargas, Assistant Director of Financial Aid, Mount Sinai Phillips School of Nursing

In this session, participants will be split into groups. Each group will be presented with a different financial aid scenario and the group will have time to brainstorm and work together to come up with a solution. After each group presents their resolution, the collective group will discuss what, if anything, could have been done differently. The goal is to have participants discuss how things are done in their office with the hopes that the conversation will provide different insight and perspective into how others handle similar situations.

### ***Tax and Non-Filer Related Comment Codes & What To Do With Them***

**Presenter:** Robert Weirnerman, Director of Training, Iron Bridge Resources, LLC  
ISIRs may be flagged with comment codes instructing the aid administrator to take action (Resolution Required!) before completing a file review or verification. In this session, we will look at some of these codes, and how to resolve them. Since the most common of these codes requires a review of a self-reported non-filing contributor's income to make sure they really are not required to file a tax return, we'll look at who has to file a tax return in tax year 2023.

### ***Keynote Speaker – Harlan Cohen***

*New York Times* bestselling author and journalist Harlan Cohen takes over 25 years of expertise and helps attendees increase grit, build resiliency, and turn adversity into success. During this

interactive and humor-filled keynote, Harlan shares a WIN OR LEARN five-step approach and delivers a new framework to help attendees create change, support team growth, and set personal and professional goals. Attendees will laugh, learn, and leave with actionable tools. Harlan turns fear into freedom and transforms obstacles into a springboard to future success. He uses his trademark humor, audience interaction, and personal journey as a bestselling author, entrepreneur, and father to challenge attendees to step outside their comfort zone and grow as individuals and leaders. He hosts a weekly college success coaching program for students and parents. Follow him on Instagram @harlancohen and on TikTok @helpmeharlan. Harlan is based in Chicago, Illinois where he lives with his wife and three children. For more info visit [www.HarlanCohen.com](http://www.HarlanCohen.com).

***Understanding The Mind Set & Attitudes of College Bound Students (and how that can translate into student success at college)***

**Presenters:** Katrina Delgrosso, College Ave & Harlan Cohen, Author & Keynote speaker  
Enrollment trends indicate the number of high school graduates is expected to peak soon, with a period of enrollment decline expected through 2037. More than ever, it is important to understand and protect students to encourage enrollment, retention, and graduation. High schools do a great job getting students into college; however, the majority of students are not equipped to navigate many of the social, emotional, physical, financial, and academic changes. With fewer years to practice their social skills due to COVID, students are even less equipped to make this change. The data indicate involved students have a better chance of persisting and graduating, but many students lack the life skills and preparation to find their connection and community once they arrive on campus. A student who can't find their people and places on campus is an at-risk student. This session will address how to help students prepare, plan, and successfully navigate the transition to college and life beyond college. This includes the financial transition and all other aspects that contribute to college success. The panel will rely on the extensive years of experience, exposure, and direct relationships with vast and broad populations of college bound high school students.

***Facing Audit Phobia***

**Presenter:** Gregory Rinderle, P.C. & Director, McClintock & Associates  
In this session, we will provide a detailed overview of recent changes to audit requirements and areas of focus from ED, outlining what you should expect for your school's next annual audit. We will present ideas to make an action plan, so the process of your annual audit is easier to manage. We will also share best practices for managing the updates from your colleagues.

***Business Etiquette***

**Presenter:** Julie Lawton, Regional Manager, Monogram, LLC.

Business Etiquette? What is it and why is it important. Come to this session to learn more about personalities at work, how your body language influences the delivery of your messages, managing business meeting etiquette on-screen, in person or during meals. We will provide tips on how and when to speak up and best ways to network.

### ***Loan Repayment Options***

**Presenter:** B.J. Revill, Director of Financial Aid, University of Rochester School of Medicine & Dentistry

This session will enable you to educate your borrowers on the Income Driven Repayment and Public Service Loan Forgiveness options by bringing you up to date on the latest from the Department of Education.

### ***Foundational Principles – Clock Hour Programs***

**Presenter:** Gregory Rinderle, P.C. & Director, McClintock & Associates

This session will focus on clock hours programs and how Title IV aid should be administered as specific nuances exist solely related to these types of courses. This session will cover two main areas: 1) Administering Title IV aid and 2) R2T4 Calculation

### ***Graduate Symposium Roundtable***

**Presenters:** Adrienne King, Senior Associate Director of Financial Aid, Bank Street College of Education & Darrin Rooker, Director of Financial Aid, Northeast College of Health Sciences

This professional round table creates an opportunity for the Graduate Financial Aid officers to connect, network and discuss similarities and solutions for hot topics. This interactive guided session will focus on shared best practices.

### ***Managing YOUR Response In Difficult Situation with the GRACE Method***

**Presenter:** Michelle Newton, Assistant Director, Financial Aid Graduate Enrollment Management & Admissions, New York University Tandon

We all have dealt with difficult situations in our financial aid roles. The challenge sometimes is not having the difficult conversations but it's how we manage our own responses in a stressful situation. Are we using our emotional intelligence or just reacting to the situation? Choosing to respond with GRACE (Gratitude, Reasonable and Respectful, Accountability, Confidence and Empathy).

We will discuss the GRACE strategy to help you respond and not react to the situation.

Learning Objectives:

- How to manage your emotions in different situations.
- Strengthening Your Emotional Intelligence
- Empowering Your Conflict and Resolution Skills

### ***Best Practices on GLBA***

**Presenter:** Clair Jacobi, Director of Financial Aid, NYITCOM

This session will provide information and best practices on how to implement safeguards and complaints with the GLBA requirements.

***Shaping EASFAA's Future: Your Voice, Your Impact***

**Presenter:** Tayler Kreutter, Executive Director of Student Financial Services, Mount Holyoke College & EASFAA President

Join us for an impactful EASFAA strategy session, open to both members and non-members. This is your opportunity to contribute to shaping the future of EASFAA by providing valuable feedback on three essential questions: What does EASFAA do really well? What could we improve? And what must be included in the next strategic plan? Your input is crucial, and this session promises to be engaging, collaborative, and essential in driving meaningful progress for the EASFAA association. Don't miss the chance to make your voice heard!

***Thursday, October 31, 2024***

***HESC Update: TAP & Excelsior Programs***

**Presenter:** Lisa Simpson, Director of College Relations, HESC

Join this session to learn about the latest procedures and information on the TAP & Excelsior Programs

***Executive Council Roundtable***

**Presenters:** NYSFAAA Executive Council

The NYSFAAA Executive Council is excited to provide a peek into the operations of the Association. Your Executive Council will provide a detailed review of the organization, its responsibilities and its future strategic plans. More importantly, the support and camaraderie of colleagues will be evidenced as you experience your Council from a personal, engaging perspective.

***Build an Office Culture That Works***

**Presenter:** Marianne Loper, Director of Student Financial Services, Houghton University

In this ever-changing world of Financial Aid, we need something firm to stand on. The best support is found in our coworkers. A positive, mission driven office is essential. The culture is the sum of all that you and your colleagues think, say, and do as you work together. Learn ways to build and maintain an indispensable team.

***Fundamentals of Return of Title IV Funds (R2T4)***

**Presenter:** Carrie Welch, Assistant Director of Financial Aid, University of Rochester

An overview of what happens to Title IV funds when a student withdraws before completing the period of enrollment. We will discuss key terms, important dates, and time frames that occur when processing R2T4s. We will provide an overview of the R2T4 formula in order to calculate the amount a school must return to Title IV programs, or the amount a student would be eligible for in a post withdrawal disbursement.



***PSLF Trends & Challenges: Results from a National Study of Participants***

**Presenter:** Patrick Ziegler, Sr. Account Executive Campus Partnerships, Earnest

This study will review the high-level findings of a recently completed study that was based on interviews with several dozen PSLF participants, some of whom have already received debt relief. We will identify common themes, challenges and potential improvements and best practices.

***Around the Beltway Update***

**Presenter:** Karen McCarthy, Vice President for Public Policy & Federal Relations, NASFAA

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 upcoming 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.

*As of August 20, 2024*