

# 2023-2024 FASFAA Conference



May 20th – 24th, 2024  
Charlotte Harbor, Florida

A Whole New World:  
Solving Mysteries

# Table of Contents

President's Welcome Letter	3
Conference Chair & Co-Chair Message	4
Welcome Letters	5
Guest Speakers	6-10
Hotel Information	11
Conference Facilities (Event Layout)	12
FASFAA Executive Board	13
Conference Committee Members	14
Agenda at a Glance	15-19
Session Details	20-38
Charity	39
Bonnie Pirkle Scholarship	40
Photo Alert	41
Sponsors	42
Thank You!	43
Next Year Conference Information	44-45
Notes	46-50





***President's Welcome***  
***Dameion Lovett***  
***FASFAA President 2023-2024***

Hello FASFAA Family,

Welcome to Port Charlotte and the 2024 FASFAA Annual Training Conference! As you get settled in here at the beautiful and brand new Sunseeker Resort, be prepared to engage in great sessions which are designed to help you improve your understanding of financial aid as you serve the students and families at your schools. We also have some fun-filled activities planned for you, so get ready to let loose! Take the opportunity to sit next to someone you do not know...you could end up gaining a lifelong friend or at least someone to share stories about a Day in the Life of an Aid Administrator!

Throughout the conference, you will also have the opportunity to meet our Business Partners. Without their support, we would not be able to hold this conference and our other events throughout the year. Please stop by the exhibit area and see what the Business Partners are all about! Also make sure you visit our charity and Bonnie Pirkle table and donate to one or both causes.

Finally, if you need any assistance during your time at the conference, please seek out a member of the conference committee or an executive board member who will be happy to help you.

Have a great conference!

Dameion Lovett  
2023-2024 FASFAA President  
University of South Florida



# A Message from Conference Chair & Co-chair

Dear FASFAA Colleagues,

Your 2024 FASFAA Conference Committee welcomes you to the annual conference. Currently, we are dealing with lots of changes and updates in the financial aid world. In planning this conference, that thought was foremost. Now more than ever, it is especially important that you remain engaged with each other and attend available training events. This will be an information packed, fun-filled networking opportunity. We are grateful that you can be here as we ***“Explore A Whole New World.”***

The conference committee has worked diligently to create an event that will be suited for all, regardless of the experience level. There are sessions by our SASFAA Friends, as well as from Business Partners and fellow FASFAA Colleagues. On Friday morning, we will be joined by staff from the Office of Inspector General and the 2023/2024 NASFAA National Chair as we close out the conference.

A special thanks to our guest speakers, presenters, moderators, sponsors, vendors, volunteers, the hotel management and staff and the Punta Gorda/Englewood Beach Visitors & Convention Bureau. Special recognition to the Conference Committee and the Executive Board. It indeed takes a village to produce an event such as you are about to experience.

As we ***“Explore A Whole New World”*** during this time of unprecedented changes, we are committing to work even more diligently to continue to support the achievement of each student’s educational goals. Thank you for joining us on this exploration. **Engage, enjoy, learn, and have a great conference experience.**

Respectfully Yours,  
Joan D Bailey  
2024 FASFAA Conference Chair

Christina Acosta - Heritage  
2024 FASFAA Conference Co-chair





April 23, 2024

Dear Members of the Florida Association of Student Financial Aid Administrators,

On behalf of the Punta Gorda/Englewood Beach Visitor and Convention Bureau, I extend a warm welcome to each of you as you prepare to convene for the 2024 Annual Training Conference at the exquisite Sunseeker Resort Charlotte Harbor. We are honored that you have chosen our destination.

During your stay, we invite you to explore the unique attractions, diverse dining options, and stunning harbor views that the Punta Gorda/Englewood Beach area offers. Whether strolling through Fishermen's Village, enjoying a sunset cruise, or relaxing on our pristine beaches, we hope you make the most of our coastal community.

We are thrilled that you will be experiencing the amenities of Sunseeker Resort Charlotte Harbor during your conference. This stunning venue encapsulates our laid-back coastal lifestyle and promises to enhance your training experience. Should you need any assistance or recommendations during your stay, please don't hesitate to reach out to us. We are committed to ensuring that your time in the Punta Gorda/Englewood Beach area is both productive and memorable.

Thank you once again for choosing our area as the host location for your 2024 conference. We are excited to showcase our region and provide you with an exceptional experience. Cheers to a successful and rewarding conference at Sunseeker Resort!

Warm regards,

*Sean Doherty*

Sean Doherty

Tourism Director

Punta Gorda/Englewood Beach Visitor and Convention Bureau

**Our Best Side is Outside.™**

Punta Gorda/Englewood Beach Visitor & Convention Bureau  
1700 Tamiami Trail, Suite G-2, Port Charlotte, FL 33948 | 941.743.1900

# GUEST SPEAKERS

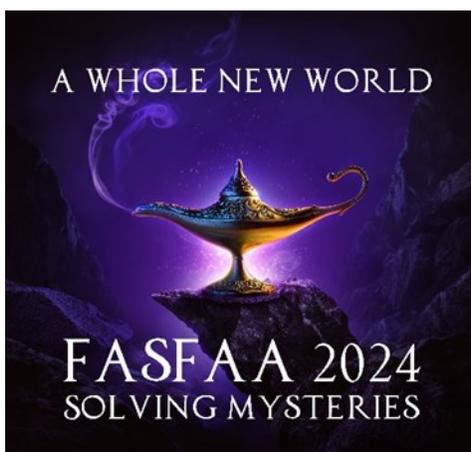


Shout out to all our wonderful speakers!

Thank you for your commitment and dedication to the Florida Association of Student Financial Aid Administration (FASFAA.) We salute you!

Sincerely,

Your Conference Committee





## Welcome Speaker

### Commissioner Bill Truex of District 3

He has worked in the corporate world for Roll Coater (a division of Arvin Industries), AT&T and Roadway Express prior to moving to Florida. Has been involved in real estate and construction for the majority of his career. Obtained state certified builder's license and is the President and Owner of Truex Preferred Construction, which has been in business in Englewood since 2005.

[Read More](#)



### Robyn Sollberger, Director of Financial Aid Campbellsville University

Robyn Sollberger serves as the Director of Financial Aid at Campbellsville University in Campbellsville, Kentucky. Robyn started in financial aid as a student worker at CU in 2001. She then served as a counselor for a couple years before leaving for the Private Sector working in accounting. She then returned to the same school to serve as the Systems Administrator, Assistant Director, and in the current role as Director. Robyn earned her Bachelor of Science in Business Administration with an Accounting Emphasis, and her Master of Business Administration from Campbellsville University. She has just begun the journey of earning her PhD. After 17 years, Robyn continues to enjoy the financial aid

profession. The ability to assist students in reach their goals is priceless. Also, what other profession can you say that you truly learn something new daily? She holds multiple NASFAA U Credentials and is a NASFAA Certified Financial Aid Administrator. Robyn has held multiple positions on the Kentucky Association of Student Financial Aid Administrators (KASFAA) Board, and currently serves as the President-elect. Robyn has been married to Jeremy for 16 years. They spend their time offering life advice to Shelby, their 27 year-old daughter that is living her best life in Colorado; and serving as taxi, coach, and cook to Coltyn who is 14, and Braylen & Brysen, 11 year old twins.



## **Rebecca Flake**

### **Higher Education Services Advisor**

Rebecca Flake has worked in the financial aid industry for over 30 years and is a Certified Financial Aid Administrator. She has worked as a financial aid officer, a director of financial aid, a Title IV compliance auditor, and a consultant. Since 2011, she has served as a Senior Advisor of Higher Education Services at Cooley, LLP. She works with a team of attorneys to assist public, non-profit, and for-profit colleges and universities with various compliance matters.



## **Gerald L. Hector**

### **Senior VP of Administration and Finance**

### **University Of Central Florida**

Gerald L. Hector, CPA is currently Senior Vice President for Administration and Finance at the University of Central Florida in Orlando, Florida. He also held similar positions in higher education at Morehouse College, Cornell University, Ithaca College, and Johnson C. Smith University. His experiences span all aspects of higher education management that include, treasurer, debt management, controller's office, information technology, post award management, policy office, student accounts/bursar, facilities, grounds, business operations, auxiliary services, risk management, purchasing and procurement, legal, financial aid, campus safety, compliance, and public private partnerships. He has also served as a liaison with local elected officials for construction

With over twenty-four years of progressive leadership in finance and operations in higher education, he is known for his collaborative and focused leadership style that garners trust and builds confidence in his divisions and units to deliver on the mission of the institutions he serves.

[Read More!](#)

**Daniel Barkowitz,**  
**Assistant VP of Student Financial Assistance and**  
**Employment - University of Miami**



Daniel T. Barkowitz is the assistant vice president of financial assistance and employment at the University of Miami. He has served 35 years in institutions of higher education. Previous roles include assistant vice president of financial aid & veterans' affairs at Valencia College, director of financial aid at MIT, dean of financial aid/associate dean of student affairs for Columbia College and Columbia Engineering at Columbia University in the City of New York, director of operations and training for the Massachusetts Educational Financing Authority, and assistant director of financial aid at Boston College. Daniel has held various volunteer roles with NASFAA, SASFAA, EASFAA, FASFAA (Florida), and MASFAA (Massachusetts), including president of SASFAA for 2023-24, past president of the Florida Association of Student Financial Aid Administrators (FASFAA) and the inaugural chair of

the NASFAA's Commission of the Certified Financial Aid Administrator® (CFAA) Program. He served as the primary negotiator for financial aid administrators in the 2021 Federal Negotiated Rulemaking. He holds the FAAC® (Financial Aid Administrator, Certified) designation. Daniel is a recipient of FASFAA's Distinguished Service Award, MASFAA's Presidential Award, two-time recipient of FASFAA's President's Recognition Award, two-time recipient of MIT's Dean of Undergraduate Education Infinite Mile Award, and the recipient of Florida College Access Network's (FCAN) Top Influencer Award. Daniel earned his Bachelor's of Science in History from Northeastern University and his Master of Education in Human Resource Education from Boston University. He earned a certificate in Professional Fundraising from Boston University. He is a published poet, musical theater actor, and Tarot card collector. Daniel has two adult children and two adorable fur-babies.



**Chris Hessberger, Special Agent - U.S. Department of Education - Office of the Inspector General**

Chris Hessberger is a former military service member who successfully transitioned into federal service. He is the Assistant Special Agent in Charge for the U.S. Department of Education, Office of Inspector General for the Pembroke Pines Field Office in southeast Florida. He has worked for EDOIG for 19 years. Additionally, for the past 18 years, he has been the regional firearms and control tactics instructor. His greatest joys and accomplishments

include his family, coaching his two sons in numerous sports (e.g., basketball, football, and soccer), and raising their labradoodle, Leia.



**Helen Faith  
2324 NASFAA National Chair**

Helen Faith is the current NASFAA National Chair and the Director of Student Financial Aid at the University of Wisconsin-Madison. She has 24 years of financial aid experience in both public and private institutions. She holds a bachelor's degree in literature from UC Santa Cruz and a master's degree in education from Portland State University, and has taken doctoral coursework in education at the University of Wisconsin-Madison. She has served the financial aid profession extensively through volunteerism, advocacy, and research collaborations.

# Sunseeker Resort

## Charlotte Harbor, FL



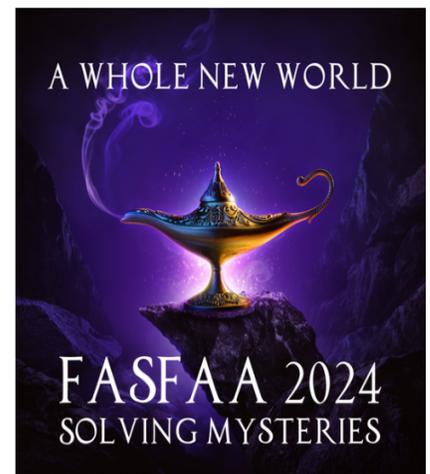
### ACCOMMODATIONS

- ◆ 596 Premium Rooms
- ◆ 189 Signature Sunsuites with one, two, and three-bedroom configurations. Including private check-in, lounge access and concierge services.
- ◆ Mobile Key & High Speed Internet
- ◆ Technologically advanced rooms & suites
- ◆ Personal device pairing and streaming options

### GUEST EXPERIENCE

- ◆ Priority access to 20 world-class food and beverage outlets
- ◆ Two spacious, guest-only pools
- ◆ State-of-the-art fitness center with expert-led classes
- ◆ Priority access to newly imagined Aileron golf club
- ◆ Premium access to fishing, sightseeing, and sunset cruises
- ◆ Dedicated shuttle service to and from the Punta Gorda airport
- ◆ On-property rental cars
- ◆ Innovative loyalty and rewards program
- ◆ Industry-leading health and safety protocols

# Conference Facility Layout



# Executive Board

<b>POSITION</b>	<b>NAME</b>
President	Dameion Lovett
President-Elect & Nominations	Kamia Mwango
Immediate Past President & Fiscal Concerns	Nadine Bailey
Vice-President of Training	Jessica Ly
Secretary	Susan Ambridge
Treasurer	Arminta Johnson
Treasurer-Elect	Chrissy Gass
Membership Chair/Volunteer Coordinator	Jody Walker
Site Selection & Event Coordinator	Irma Molinares
Region I Representative	Angelica Coonts
Region II Representative	Alisha Hunt
Region III Representative	Karissa Lawson
Region IV Representative	Merrian D. King
Region V Representative	Joseph Gonzales
Conference Chair	Joan Bailey
Conference Co-Chair	Christina Acosta-Heritage
Co-Site Selection Chair	Laura Dickerson
Electronic Service Chair	Eddie Schworn
Scholarship & Charity Chair	Jonathan Reynolds
Federal and State Legislative Chair	Egan Hanson
Global Issues Chair	Brenda Ilojiole
Vendor/Sponsorship Chair	Becky Davis
Early Awareness/Outreach & Financial Literacy Chair	Ilia Cordero
Grad/Professional Chair (Private/For Profit/Non-Profit)	Melissa Frimpong
Vocational-Technical & Clock Hour Chair	Jeanne Schurman
OSFA Liaison	Shawn Haskin

# Conference Committee Members

<b>POSITION</b>	<b>NAME</b>
Conference Chair	Joan Bailey
Conference Co-Chair	Christina Acosta-Heritage
Program Chair	Jessica Ly
Membership Chair & Co-Registration Chair	Jody Walker
Treasurer	Arminta Johnson
Bookkeeper	Gwyn Francis
Treasurer-Elect	Chrissy Gass
Local Arrangement Chair & 2025 Annual Conference Chair	Traci Spagnoli-Rego
Co-Registration Chair & Pre-Conference	Tracy Wiles-Klinginsmith
Electronic Services Chair & Technical Support	Eddie Schworn
Scholarship & Charity Chair	Jonathan Reynolds
Entertainment Coordinator	Brenda Ilojirole
Vendor/Sponsorship Chair	Becky Davis
Director's Summit Chair	Tierra Smith
Director's Summit Co-Chair & Conference Website Coordinator	Brenda Brown
FASFAA President	Dameion Lovett

# Agenda at a Glance

Dates	Sessions	Location
<b>Monday, May 20, 2024 (Director's Summit Only)</b>		
12:00 PM – 1:00 PM	Director Summit Registration Open	Registration Desk
1:00 PM – 1:30 PM	Welcome & Introductions	Pompano
1:30 PM – 2:30 PM	The New Normal Continues to Affect Us	Pompano
2:30 PM – 2:45 PM	Break	
2:45 PM – 3:45 PM	Exploring A Whole New World of 24-25 FAFSA Application Processing	Pompano
3:45 PM – 4:15 PM	Business Partner Resources & Speed Session	Pompano
4:15 PM – 5:30 PM	Embark on A Journey of Navigating Challenges and Crafting Strategies for Directors in Higher Education	Pompano
5:30 PM – 8:00 PM	Dinner On Your Own	It's your pick!
8:00 PM – 10:00 PM	Networking for Summit Attendees	Hospitality Suite
<b>Tuesday, May 21, 2024 (Director's Summit Only)</b>		
8:30 AM - 9:30 AM	Tackling the Struggle of Salaries and Compensation in the Financial Aid Profession	Pompano
9:30 AM – 10:30 AM	Reviewing Your Office Structure, Acquiring Talent, and Cultivating Your Staff to Overcome Staffing Challenges	Pompano
10:30 AM - 10:45 AM	Break	
10:45 AM - 11:45 AM	Elevating the Perception of the Financial Aid Office on Your Campus	Pompano
11:45 AM - 12:45 PM	Lunch	Tarpon
12:45 PM - 1:45 PM	Unlocking Financial Aid Mysteries: Navigating Uncharted Regulatory Waters	Pompano
1:45 PM - 2:00 PM	Wrap-Up & Closing	Pompano

FLORIDA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

**FASFAA 2024 DIRECTORS SUMMIT**

May 20 – 21, 2024

## Tuesday, May 21, 2024

7:30 AM – 8:30 AM	Registration Open (closed during lunch)	Registration Desk
8:00 AM – 12:00 PM	Exhibit Area Setup	Great Egret Foyer
<b>Pre-Conference Session NASFAA Credentials Session</b>		
9:00 AM – 12:00 PM	NASFAA Credential: Student Eligibility	Cobia
	NASFAA Credential: Return to Title IV (R2T4)	Amberjack
9:00 AM - 12:00 PM	LEAP Sessions (LEAP Participants Only)	Red Drum
12:00 PM - 1:00 PM	Lunch Pre-Conference & LEAP Attendees Only	Tarpon
12:00 PM - 2:15 PM	Exhibit Area Opens	Great Egret Foyer
12:45 PM - 2:00 PM	Directors Summit Day 2 Closing	Pompano
1:15 PM - 2:15 PM	New Horizons: Networking in a Whole New World (New Members & First Time Conference Attendees)	Cobia
1:30 PM - 2:00 PM	Moderators Meeting	Amberjack
2:30 PM - 5:00 PM	Opening Session & Keynote	Great Egret Ballroom
5:30 PM – 7:00 PM	Welcome Reception	Great Egret Ballroom
7:00 PM – 8:30 PM	Dinner On Your Own	It's your Pick!
8:30 PM – 10:30 PM	Hospitality Suite Open	

## Wednesday, May 22, 2024 FASFAA Spirit Day - Wear FASFAA: Themed Clothing

7:30 AM - 8:30 AM	Continental Breakfast	Great Egret Foyer
8:30 AM - 10:00 AM	<b>General Session 1:</b> 24-25 FAFSA Simplification Update Implementation and Beyond - Lessons Learned and Best Practices	Great Egret Ballroom
10:00 AM - 10:15 AM	Transition Break	
10:00 AM - 11:30 AM	Exhibit Area Open	Great Egret Foyer
<b>Concurrent Sessions 1</b>		
	Elevating Onboarding: Fostering Connection and Competence in Remote Work Environment	Amberjack
10:15 AM - 11:15 AM	Professional Judgment & Foreign Tax Exclusion	Bonito
	24-25 Student Aid Index (SAI) Calculation	Pompano
	Cyber Security & Data Sharing under FUTURE ACT	Red Drum
	Making Informed Decisions: The Role of Consumer Information	Cobia
11:15 AM - 11:30 AM	Transition Break	
11:30 AM - 1:00 PM	Opening Luncheon, Business Meeting and Award Ceremony	Great Egret Ballroom

1:00 PM - 1:15 PM Transition Break

1:00 PM - 4:30 PM Exhibit Area Open

Great Egret Foyer

### Concurrent Sessions 2

	Hey...Focus! Finding Professional and Personal Success Through Managing Your 'Squirrel Moments'	Amberjack
1:15 PM - 2:15 PM	State Scholarship and Grant Programs - General Update	Bonito
	The ROI of Financial Education	Cobia
	2024-2025 Pell Calculation	Pompano
	Clock Hour/Technical Schools Prep for 24-25	Red Drum

2:15 PM - 2:30 PM Transition Break

### Concurrent Sessions 3

	Lessons Learned: Tips for Avoiding Pitfalls and Successfully Implementing an Enterprise Software Solution	Amberjack
2:30 PM - 3:30 PM	How Building a Collaborative Team Led to Transformative Interventions with At-Risk Students	Bonito
	Handling Difficult Conversations	Cobia
	Building Your Financial Wellness Foundation	Pompano
	Return to Title IV (R2T4) with Modules	Red Drum
3:30 PM - 4:00 PM	Network and Visit with the FASFAA Business Partners	Great Egret Foyer

### Concurrent Sessions 4

	Satisfactory Academic Progress	Amberjack
	Gainful Employment & Financial Value Transparency	Bonito
4:00 PM - 5:00 PM	Strategies for Exemplary Customer Service	Cobia
	2024-25 Verification	Pompano
	Navigating the New Normal: Managing an Understaffed Office	Red Drum
5:00 PM - 6:00 PM	Business Partner Reception (By Invitation Only)	Hospitality Suite
6:30 PM - 8:00 PM	Business Partner Dine Around Town	
8:00 PM - 10:00 PM	Hospitality Suite Open	

## Thursday, May 23, 2024 Region Day - Wear Your Region Colors!



7:30 AM - 8:30 AM	Continental Breakfast	Great Egret Foyer
7:30 AM - 11:30 AM	Registration Open (Closed for Lunch)	Registration Desk
8:30 AM - 10:00 AM	<b>General Session 2:</b> Navigating the Impact of Student Aid Index (SAI) on Packaging Policies and Procedures	Great Egret Foyer
10:00 AM - 10:30 AM	Transition Break	
10:00 AM - 11:30 AM	Exhibit Area Open	Great Egret Foyer
<b>Concurrent Sessions 5</b>		
	Leading with Resilience: Navigating Staff and Leadership Burnout	Amberjack
10:30 AM - 11:30 AM	State Scholarship and Grant Program - Technical Reporting	Bonito
	Dependency Override & Unaccompanied Homeless Youth	Pompano
	Averting Danger- Combatting Fraud in Higher Education	Red Drum
11:30 AM - 11:45 AM	Transition Break	
11:45 AM - 1:30 PM	<b>Business Partner Lunch and Learn</b>	
	MOHELA - Gold Sponsor	Amberjack
11:45 AM - 12:15 PM	Oracle - Gold Sponsor	Cobia
	College Ave - Platinum Sponsor	Pompano
	Earnest - Platinum Sponsor	Bonito
12:45 PM - 1:15 PM	<b>Unwind w/FASFAA</b>	Great Egret Ballroom
<b>Concurrent Sessions 6</b>		
	The Student Loan Repayment Checklist	Amberjack
1:30 PM - 2:30 PM	Administration of Aid Programs: Awarding, Reconciliation, and Cash Management	Bonito
	FAU's Federal Work Study Evolution: Strategies for Student & Staff Engagement	Cobia
	2024-25 FAFSA Scenarios/FAFSA Walkthrough	Pompano
	Navigating the Maze: FERPA Compliance Demystified	Red Drum

1:30 PM - 3:30 PM Exhibit Area Open Great Egret Foyer

2:30 PM - 2:45 PM Transition Break

### Concurrent Sessions 7

Financial Aid Jeopardy Amberjack

2024-25 C-Code Crosswalk & New Requirements Bonito

2:45 PM - 3:45 PM

Paying for Graduate School Cobia

2024-25 Cost of Attendance Pompano

Unveiling the Secrets: Reviewing Florida Bright Futures Scholarship Appeals Red Drum

4:00 PM - 5:00 pm Exhibitor Area Breakdown Great Egret Foyer

3:45 PM - 4:00 PM Transition Break

### Region Meetings

Region I Amberjack

4:00 PM - 4:30 pm Region II Red Drum

Region III Cobia

Region IV Pompano

Region V Bonito

4:30 PM - 5:15 PM State College Directors Meeting Pompano

5:00 PM - 7:30 PM Dinner On Your Own It's Your Pick!

8:00 PM - 10:30 PM FASFAA Fun Night Great Egret Ballroom

## Friday, May 24, 2024

7:30 AM - 9:00 AM Breakfast Great Egret Foyer

9:15 AM - 10:15 AM **General Session 3:** Office of the Inspector General Great Egret Ballroom

10:15 AM - 11:30 AM **General Session 4:** NASFAA Update Great Egret Ballroom

11:30 AM - 12:00 PM FASFAA Business Meeting Continued and Closing Remarks Great Egret Ballroom

# Detailed Agenda

Dates	Sessions	Location
<b>Monday, May 20, 2024 (Director's Summit Only)</b>		
12:00 PM – 1:00 PM	<b>Director Summit Registration Open</b>	<b>Registration Desk</b>
1:00 PM – 1:30 PM	<b>Director's Summit - Day 1 Welcome &amp; Introductions</b> <b>Hosted by:</b> Tierra Smith, Director of Financial Aid, Hillsborough Community College  Brenda M. Brown, VP of Campus Partnerships, College Aid Services	<b>Pompano</b>
1:30 PM – 2:30 PM	<b>The New Normal Continues to Affect Us</b>  As we see what is happening in the world of higher education with school closures, mergers, FAFSA delays, and the enrollment cliff, a refocus on the basics of higher education finance and operations is more important now than ever before. This presentation will discuss where we were, where we are, and where we are headed through the lens of Chief Financial and Administrative Officer with experiences at HBCUs, PWIs (including an Ivy League), and an HSI. There are no shortcuts to managing a higher education institution, and it will require that all campus constituents understand the fundamentals of our financial and operational positioning for the future. Without a firm grounding in the facts, we cannot serve our institutions, in particular our students, with the excellence they have come to expect.  <b>Speaker:</b> Gerald L. Hector, Senior Vice President for Administration and Finance, University of Central Florida	<b>Pompano</b>
2:30 PM – 2:45 PM	<b>Break</b>	
2:45 PM – 3:45 PM	<b>Exploring A Whole New World of 24-25 FAFSA Application Processing</b>  Step into a whole new world of financial aid as we embark on a journey through the 24-25 FAFSA application processing. Just like the magic carpet ride in the beloved song, we'll explore the enchanted realms of student aid, where dreams and opportunities await. From the shining, shimmering, splendid possibilities to the challenges and triumphs of navigating this new frontier, this conversation promises to be a thrilling adventure. Join us as we uncover the mysteries, embrace the changes, and discover a whole new world of financial aid possibilities.  <b>Speaker:</b> William K. Spiers, Jr., Director of Student Financial Services, Tallahassee Community College	<b>Pompano</b>
3:45 PM – 4:15 PM	<b>Business Partner Resources &amp; Speed Session</b> <b>Speaker:</b> Brenda M. Brown, FASFAA Business Partner Liaison	<b>Pompano</b>

4:15 PM – 5:30 PM **Embark on A Journey of Navigating Challenges and Crafting Strategies for Directors in Higher Education** Pompano

Embark on a journey through the enchanted world of financial aid administration, where Financial Aid Directors from diverse higher education institutions convene to explore the magical twists and turns of their roles. Inspired by Aladdin's quest for a new horizon, this open forum invites participants to unravel the mysteries of modern financial aid management against the backdrop of a dynamic and ever-changing landscape. This session invites attendees to share their tales of triumph and tribulation in financial aid management, unlocking the secrets to overcoming obstacles and casting spells of positive change within their institutions. By fostering a spirit of camaraderie and shared wisdom, participants will depart with newfound insights and enchanted strategies to chart their course toward exemplary customer service and student success in the magical realm of higher education.

**Hosted by FASFAA Director Summit Co-Chairs**

Tierra Smith, Director of Financial Aid, Hillsborough Community College

Brenda M. Brown, VP of Campus Partnerships, College Aid Services

**Tuesday, May 21, 2024 (Director's Summit Only)**

8:30 AM - 9:30 AM **Tackling the Struggle of Salaries and Compensation in the Financial Aid Profession** Pompano

Financial aid professionals play a pivotal role in shaping students' educational journeys, yet they often face challenges related to salaries and compensation that can impact morale and retention. In this session, we address the pressing issue of salary disparity and explore strategies for advocating for fair compensation within the financial aid profession.

**Speakers:** Aida Claro, Director of Financial Aid, Barry University

Dr. Raymond Nault, Jr., President/CEO,  
College Aid Services

Tierra Smith, Director of Financial Aid, Hillsborough  
Community College

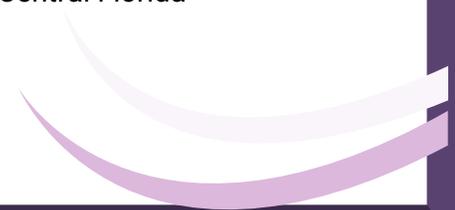
Tina Lamb, Director, Student Financial Aid &  
Scholarships, University of Florida

9:30 AM – 10:30 AM **Reviewing Your Office Structure, Acquiring Talent, and Cultivating Your Staff to Overcome Staffing Challenges** Pompano

Building and maintaining a skilled and motivated team is essential for the success of any financial aid office. However, recruiting and retaining talented staff members can present significant challenges in today's competitive job market. In this session, we delve into strategies for evaluating your office structure, attracting top talent, and nurturing a supportive and engaged workforce to overcome staffing challenges effectively.

**Speaker:** Alicia Keaton, Interim Associate VP of Enrollment,  
Planning and Management, University of Central Florida

10:30 AM - 10:45 AM **Break**



10:45 AM - 11:45 AM **Elevating the Perception of the Financial Aid Office on Your Campus** Pompano

The financial aid office plays a vital role in supporting student success and fostering a positive campus environment. However, perceptions of the financial aid office can vary widely among students, faculty, and staff, impacting the office's effectiveness and influence. In this session, we explore strategies for enhancing the visibility, credibility, and reputation of the financial aid office within the broader campus community.

**Speaker:** Karemah Manselle, Interim Director of Financial Aid,  
University of Central Florida

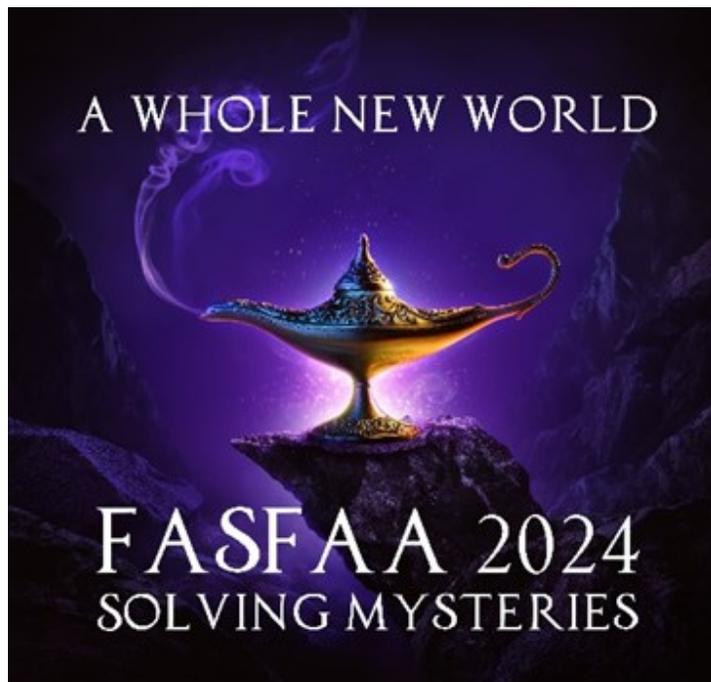
11:45 AM - 12:45 PM **Lunch** Tarpon

12:45 PM - 1:45 PM **Unlocking Financial Aid Mysteries: Navigating Uncharted Regulatory Waters** Pompano

In the ever-evolving landscape of financial aid, unraveling the mysteries beyond FAFSA is essential to safeguard institutional compliance. Amidst heightened scrutiny, this session delves into the less-explored regulatory shifts and compliance requirements, empowering financial aid directors with the insights needed to navigate uncharted waters effectively. Stay informed, stay compliant, and secure your institution's financial aid processes across all fronts.

**Speaker:** Rebecca Flake, Senior Advisor, Higher Education  
Services, Cooley LLP

1:45 PM - 2:00 PM **Wrap-Up & Closing** Pompano



Dates	Sessions	Location
<b>Tuesday, May 21, 2024</b>		
7:30 AM – 8:30 AM	<b>Registration Open (Closed During Lunch)</b>	<b>Registration Desk</b>
8:00 AM – 12:00 PM	<b>Exhibit Area Setup</b>	<b>Great Egret Foyer</b>
<b>Pre-Conference Session NASFAA Credentials Session (Pick One)</b>		
9:00 AM – 12:00 PM	<b>NASFAA Credential: Student Eligibility</b>	<b>Cobia</b>
<p>This workshop will prepare you to earn the Student Eligibility credential. You will need to know the student eligibility requirements for receipt of federal financial aid. This workshop will help you demonstrate the ability to protect the integrity of Title IV programs by ensuring—before awarding or disbursement of funds—that your school’s students meet all relevant student-related and program-related eligibility requirements.</p>		
<p><b>Speakers:</b> Melissa Frimpong, Financial Aid Manager, University of South Florida Health  Laura Dunaway, Assistant Director of Financial Aid, University of Tampa</p>		
<b>Moderator:</b> Angelica Coonts		
<b>NASFAA Credential: Return to Title IV (R2T4)</b>		
<b>Amberjack</b>		
<p>This workshop will prepare you to earn the Return to Title IV credential. You will need to know how to handle a student’s Title IV funds when he withdraws from school before completing the payment period or period of enrollment. You will need to know the basic requirements for the return of Title IV funds (R2T4), whether and when to apply the requirements, how to determine the student’s withdrawal date, how to calculate the return of funds for each Title IV program, all applicable deadlines, and the rules for making post-withdrawal disbursements. This will help you demonstrate the ability to protect the integrity of the Title IV programs by ensuring your school promptly returns federal funds for which a withdrawn student no longer qualifies.</p>		
<p><b>Speakers:</b> Heidi Goldsworthy, Independent Consultant  Karissa Lawson, Coordinator of Scholarships, University of Central Florida</p>		
<b>Moderator:</b> Nadine Bailey		
9:00 AM - 12:00 PM	<b>LEAP Sessions (LEAP Participants Only)</b>	<b>Red Drum</b>
<p><b>Speakers:</b> Colin Benner, LEAP Coordinator  Tiffany Ireland, LEAP Coordinator</p>		
12:00 PM - 1:00 PM	<b>Lunch (Pre-Conference &amp; LEAP Attendees Only)</b>	<b>Tarpon</b>
12:00 PM - 2:15 PM	<b>Exhibit Area Opens</b>	<b>Great Egret Foyer</b>
1:15 PM - 2:15 PM	<b>New Horizons: Networking in a Whole New World (New Members &amp; First Time Conference Attendees)</b>	<b>Cobia</b>
<b>Speaker:</b> Jody Walker, FASFAA Membership/Volunteer Chair		

1:30 PM - 2:00 PM	<b>Moderators Meeting</b>	<b>Amberjack</b>
	<b>Speakers</b> Jessica Ly, FASFAA VP	
2:30 PM - 5:00 PM	<b>Opening Session &amp; Keynote</b>	<b>Great Egret Ballroom</b>
5:30 PM – 7:00 PM	<b>Welcome Reception</b>	<b>Great Egret Ballroom</b>
7:00 PM – 8:30 PM	<b>Dinner On Your Own</b>	<b>It's your Pick!</b>
8:30 PM – 10:30 PM	<b>Hospitality Suite Open</b>	

**Wednesday, May 22, 2024 FASFAA Spirit Day - Wear FASFAA: Themed Clothing**

7:30 AM - 8:30 AM	<b>Continental Breakfast</b>	<b>Great Egret Foyer</b>
8:30 AM - 10:00 AM	<b>General Session 1: 24-25 FAFSA Simplification Update Implementation and Beyond - Lessons Learned and Best Practices</b>	<b>Great Egret Ballroom</b>

Join us for an insightful session as we dive into the implementation of FAFSA Simplification and explore the broader lessons learned so far. We will discuss what is working, what is not, and important considerations to make as you continue to work through the 2024-2025 FAFSA year!

**Speakers:** Daniel Barkowitz, Assistant VP of Student Financial Assistance and Employment, University of Miami

Katie Conrad, Sr. Associate Director, Financial Aid, Florida International University

**Moderator:** Nathan R. Basford

10:00 AM - 10:15 AM	<b>Transition Break</b>	
10:00 AM - 11:30 AM	<b>Exhibit Area Open</b>	<b>Great Egret Foyer</b>

**Concurrent Sessions 1**

10:15 AM - 11:15 AM	<b>Elevating Onboarding: Fostering Connection and Competence in Remote Work Environment</b>	<b>Amberjack</b>
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Emphasizing the importance of resilience, adaptability, and teamwork in surviving and thriving in an understaffed environment. Will discuss lessons learned regarding onboarding, what worked, didn't work, and continued challenges. Finally, we will discuss how to communicate the critical need of providing the financial aid office with the appropriate resources to include staffing.

**Speakers:** Egan Hanson, Global Head of Compliance & Institutional Effectiveness, Schiller International University

Tamika Martin, Director of Financial Services, Valencia College

Shareece Moore-Robinson, Assistant Director, Valencia College

**Moderator:** Alicia Keaton



10:15 AM - 11:15 AM **Professional Judgment & Foreign Tax Exclusion**

**Bonito**

This session will explore the complexities of professional judgment and foreign income tax exclusion in the context of financial aid administration. As financial aid professionals strive to meet the diverse needs of students from varying backgrounds, the ability to exercise professional judgment and accurately assess financial need is critical for ensuring equitable access to higher education.

**Speakers:** Suzanne Evans, Director of Financial Aid  
Veterans Affairs, St. Johns River State College

Rocio Perez, Financial Aid Officer II,  
Florida International University

**Moderator:** Andy Weaver

**Making Informed Decisions: The Role of Consumer Information**

**Cobia**

Understanding financial aid options and making informed decisions is crucial for students and families navigating the complexities of financing higher education. This session focuses on the pivotal role of consumer information in guiding individuals through the financial aid landscape.

**Speaker:** Robyn Sollberger, Director of Financial Aid,  
Campbellsville University

**Moderator:** Taige Haines

**24-25 Student Aid Index (SAI) Calculation**

**Pompano**

Unlock the intricacies of the Student Aid Index (SAI) calculation in this comprehensive session designed for financial aid professionals seeking to maximize their understanding and proficiency in determining student eligibility for financial assistance in the academic year 2024-2025. Join us to deepen your understanding of the SAI calculation.

**Speaker:** Edward Schworn, Financial Aid Officer II,  
Florida International University

**Moderator:** Kathleen Roebuck

**Cyber Security & Data Sharing under FUTURE ACT**

**Red Drum**

Join us for an insightful session dedicated to exploring the intersection of cyber security and data sharing under the FUTURE (Fostering Undergraduate Talent by Unlocking Resources for Education) Act. As educational institutions increasingly rely on data-driven approaches to enhance teaching, learning, and research, ensuring the security and integrity of sensitive information has become paramount.

**Speaker:** Rebecca Flake, Senior Advisor Higher  
Education Services, Cooley LLP

**Moderator:** Paul Gilroy

11:30 AM - 1:00 PM **Opening Luncheon, Business Meeting and Award Ceremony**

**Great Egret Ballroom**

1:00 PM - 1:15 PM **Transition Break**

1:00 PM - 4:30 PM **Exhibit Area Open**

**Great Egret Foyer**

**Hey...Focus! Finding Professional and Personal Success Through Managing Your 'Squirrel Moments'**

Amberjack

In this presentation, we will explore practical approaches that can help all individuals who simply lack focus. Individuals with attention deficit hyperactivity disorder (ADHD) and obsessive-compulsive disorder (OCD) face unique challenges that can impact their productivity and overall well-being. Managing these conditions at the workplace requires a comprehensive understanding of their characteristics and the implementation of appropriate strategies. All can thrive in the workplace, enhancing their professional potential while maintaining personal wellness. Together, employers and employees can cultivate an inclusive work environment that will benefit both individuals and the organization.

**Speakers:** Lou Murray, Campus Partnerships,  
Earnest Student Loans

Katie Conrad Sr. Associate Director, Financial Aid,  
Florida International University

**Moderator:** Chrissy Gass

**State Scholarship and Grant Programs - General Update**

Bonito

The Florida Department of Education, Office of Student Financial Assistance (OSFA) representatives are proud to provide an annual update and review of Florida's state scholarship, grant, and tuition assistance programs. Dive into the latest updates regarding state student financial assistance that include state scholarship and grant program statistics for the 2023-24 fiscal year, results from the 2024 legislative session, and 2024-25 program modifications on the horizon.

**Speakers:** Shawn Haskin, Director State Scholarships and Grants,  
FL Department of Education

Pedro Hernandez, Outreach Director,  
Office of Student Financial Assistance,  
FL Department of Education

**Moderator:** Aida Claro

**The ROI of Financial Education**

Cobia

Whether you call it financial literacy, financial education, or something else altogether, most higher education professionals are aware of the growing trend to help students manage their money in school and beyond. Yet while some colleges have dedicated offices and budgets to support such programs, other institutions struggle to justify investing in an initiative that may or may not yield beneficial results. This presentation provides a simplified review of numbers that will provide a basis for calculating the "ROI of financial education," and examples of institutional success through financial education initiatives.

**Speakers:** Tami Gilbeaux, Assistant Vice President Business  
Development, Inceptia

Eroica Davis, Associate Director, Florida Institute of  
Technology

**Moderator:** Kim Phillips



### 2024-2025 Pell Calculation

Pompano

In this comprehensive session you learn about minimum, maximum, and calculated Pell and how to use enrollment intensity to determine Pell grant eligibility.

**Speaker:** Lakisha Sanders, Assistant VP of Financial Aid and Veteran Affairs, Valencia College

**Moderator:** Christopher Jordan

### Clock Hour/Technical Schools Prep for 24-25

Red Drum

Join us for a session tailored to financial aid professionals in clock-hour and technical schools, designed to equip attendees with the knowledge and tools needed to optimize financial aid support for students in the upcoming academic year 2024-2025. The session will include new terminology and definitions, old vs new, and will discuss how max, min, and calculated Pell grant is identified and applied to specific student cases

**Speaker:** Jeanne Schurman, Financial Aid Manager, Hillsborough Community College

**Moderator:** Nicole Verrett

2:15 PM - 2:30 PM **Transition Break**

2:30 PM - 3:30 PM

### Concurrent Sessions 3

#### Lessons Learned: Tips for Avoiding Pitfalls and Successfully Implementing an Enterprise Software Solution

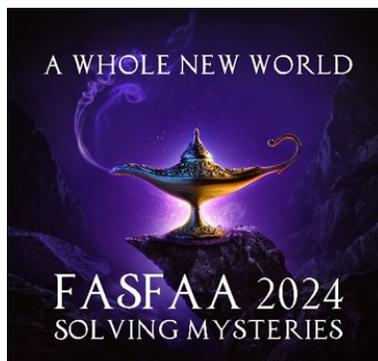
Amberjack

Join us for a dynamic session focusing on Santa Fe College's transition from a legacy system to Regent's SaaS-based financial aid platform. This session, designed for collaborative learning, combines SF's practical experiences navigating this transition with Regent presenters' expertise implementing large-scale technology projects. It's a unique opportunity for financial aid professionals to gain essential insights and strategies for successful enterprise software implementations, rich with real-world lessons, expert advice, and networking opportunities.

**Speakers:** Katie Blot, Regent Education

Kamia Mwangi, Director of Financial Aid,  
Santa Fe College

**Moderator:** Avanti Johnson-Lescott



## **How Building a Collaborative Team Led to Transformative Interventions with At-Risk Students**

**Bonito**

The Office of Student Financial Aid (OSFA) at Florida Atlantic University (FAU) is comprised of a diverse multigenerational work force with ages spanning over a 45-year time period. The synergies created by marrying young fresh innovation with lifelong professional expertise provides a broader insight, enhanced productivity and increased output which allows us to facilitate exceptional financial aid support for students while also bolstering organizational goals. FAU OSFA has adopted proactive measures to meet the differing needs and priorities of its multigenerational workforce. Our team worked together to locate communication gaps which greatly impacted those students. With new processes and proactive engagements, we have seen huge improvements with need and merit-based aid retention, SAP appeal completion, and overall connection with our students. In this session, we will share how we have fostered a collaborative work environment that allows our individual team members to satisfy their professional needs while also supporting overarching institutional objectives. We will delve into how we have augmented job responsibilities to meet generational priorities/interests, and how those changes have benefited our students.

**Speakers:** Chrissy Gass, Director of Scholarships,  
Florida Atlantic University

Tamsyn French, Director, Financial Aid and Student  
Success, Florida Atlantic University

**Moderator:** Concepta Williamson

## **Handling Difficult Conversations**

**Cobia**

Learning how to navigate tough conversations is just as important as keeping up with regulatory requirements and maintaining compliance. Students and families are often frustrated or confused by the financial aid process. It can sometimes be difficult to explain to faculty and staff how policies and procedures affect financial aid. In this webinar, we will discuss examples of topics that can be upsetting or lead to tension, strategies for conflict management and resolution, how to empower the speaker to feel confident in their answers and information, and tips for steering conversations toward a positive outcome for everyone involved.

**Speakers:** Brenda Brown, Vice President of Campus Partnerships,  
College Aid Services

Dr. Raymond Nault, President/CEO,  
College Aid Services

William K Spiers, Jr. Director of Student Financial  
Services, Tallahassee Community College

**Moderator:** Shareece Moore-Robinson

## **Building Your Financial Wellness Foundation**

**Pompano**

Join this engaging personal development session. Learn financial strategies to effectively create and achieve your Life Plan goals. We will guide you on how to focus your personal spending habits, credit development, savings, priorities and investing in ways that will support your dreams, aspirations, and "bucket list" items!

**Speaker:** Christopher Magnan, Senior Advisor, Financial Literacy,  
University of Miami

**Moderator:** Rodney Walton



### **Return to Title IV (R2T4) with Modules**

**Red Drum**

Join us for an informative session where we will navigate the complexities of Return of Title IV Funds (R2T4) with modules. As higher education institutions increasingly offer modules or non-standard term programs to meet the diverse needs of students, understanding the unique implications of R2T4 becomes essential for maintaining compliance and effectively managing financial aid disbursements and refunds.

**Speaker:** Heidi Goldsworthy, Independent Consultant

**Moderator:** Pedro Hernandez

3:30 PM - 4:00 PM **Network and Visit with the FASFAA Business Partners**

**Great Egret Foyer**

4:00 PM - 5:00 PM

### **Concurrent Sessions 4**

#### **Satisfactory Academic Progress**

**Amberjack**

Ensuring satisfactory academic progress (SAP) is crucial for maintaining eligibility for financial aid and staying on track towards graduation. In this session, we'll delve into the essential components of SAP policies, explore common challenges students face, and discuss best practices for supporting student academic success and financial aid eligibility.

**Speaker:** Jordan Pulido, Financial Aid Officer,  
Florida International University

**Moderator:** Brenda Brown

#### **Gainful Employment & Financial Value Transparency**

**Bonito**

Join us for an informative session dedicated to exploring the intersection of gainful employment regulations and financial value transparency in higher education. In an era of increasing scrutiny on the return on investment (ROI) of educational programs, ensuring transparency and accountability in outcomes has become essential for students, institutions, and policymakers alike. This session will provide attendees with a comprehensive overview of gainful employment regulations, financial value metrics, and strategies for promoting transparency and accountability in higher education.

**Speaker:** Daniel Barkowitz, Assistant VP of Student  
Financial Assistance and Employment,  
University of Miami

**Moderator:** Lisa Branson

#### **Strategies for Exemplary Customer Service**

**Cobia**

In a complex and compliance focused environment like a Financial Aid Office, providing exemplary customer service can be challenging. In this session we will explore strategies to enhance the student experience with your office. Topics will include communicating with students (positive reframing, de-escalation, setting expectations), knowledge management (source of truth, resource focus, training), and continuous improvement (useful metrics, collecting and using data).

**Speaker:** Colin Benner, Coordinator, Financial Aid Client  
Services, Santa Fe College

**Moderator:** Will Brantley

### **2024-2025 Verification**

**Pompano**

Join us for an insightful session focused on advancing financial aid verification practices to better serve students and institutions in the academic years 2024-2025. Gain a deeper understanding of regulatory requirements and compliance considerations surrounding financial aid verification. Learn how institutions can ensure compliance with federal regulations while maintaining data security and integrity.

**Speaker:** Marie Guerra Rosado, Manager of Academic Support Services, University of Florida

**Moderator:** Irma Molinares

### **Navigating the New Normal: Managing an Understaffed Office**

**Red Drum**

Emphasizing the importance of resilience, adaptability, and teamwork in surviving and thriving in an understaffed environment. Also how to communicate the critical need of providing the financial aid office with the appropriate resources to include staffing.

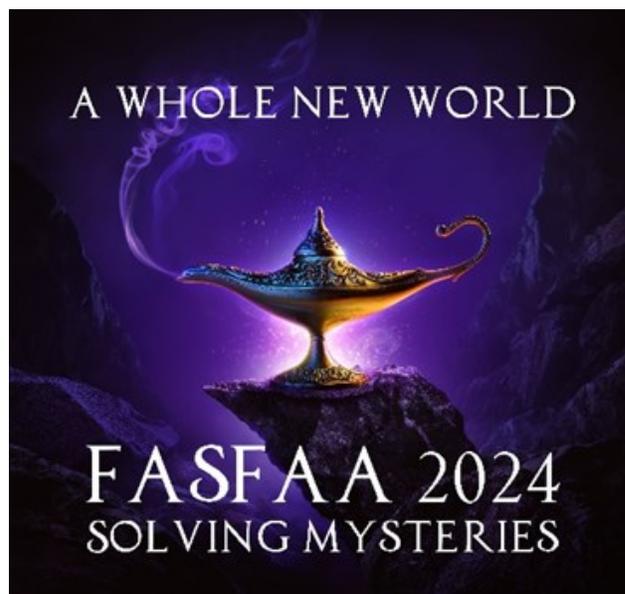
**Speaker:** Alicia Keaton, Interim Associate VP of Enrollment Planning and Management, University of Central Florida.

**Moderator:** Tori Watson

5:00 PM - 6:00 PM **Business Partner Reception (Invitation Only)**

6:30 PM - 8:00 PM **Business Partner Dine Around Town**

8:00 PM - 10:00 PM **Hospitality Suite Open**



## Thursday, May 23, 2024 Region Day - Wear Region Colors!



7:30 AM - 8:30 AM	<b>Continental Breakfast</b>	<b>Great Egret Foyer</b>
7:30 AM - 11:30 AM	<b>Registration Open (Closed for Lunch)</b>	<b>Registration Desk</b>
8:30 AM - 10:00 AM	<b>General Session 2: Handling the Impact of Student Aid Index (SAI) on Packaging Policies and Procedures</b> Join us for an informative session tailored to financial aid professionals seeking to understand and navigate the impact of the Student Aid Index (SAI) on their institution's packaging policies and procedures. This session is essential for financial aid officers, administrators, and professionals in educational institutions looking to optimize student aid allocation while ensuring compliance with federal regulations. Gain practical tips on optimizing aid allocation, maximizing student assistance, and supporting equitable access to higher education. <b>Speakers:</b> Lakisha Sanders, Assistant VP of Financial Aid and Veteran Affairs, Valencia College Robyn Sollberger, Director of Financial Aid Campbellsville University  William K. Spiers, Director of Student Financial Services, Tallahassee Community College  Katie Conrad, Sr. Associate Director, Financial Aid, Florida International University <b>Moderator:</b> David Alexander	<b>Great Egret Ballroom</b>
10:00 AM - 10:30 AM	<b>Transition Break</b>	
10:00 AM - 11:30 AM	<b>Exhibit Area Open</b>	<b>Great Egret Foyer</b>
10:30 AM - 11:30 AM	<b>Concurrent Sessions 5</b>	
	<b>Leading with Resilience: Navigating Staff and Leadership Burnout</b> Discuss how to help your team with burnout when you're burned out yourself along with the causes, symptoms, and strategies to better manage it. <b>Speaker:</b> Alicia Keaton, Interim Associate VP of Enrollment, Planning and Management, University of Central Florida. <b>Moderator:</b> Deepika Vemagiri	<b>Amberjack</b>

## State Scholarship and Grant Program - Technical Reporting

Bonito

The Florida Department of Education, Office of Student Financial Assistance (OSFA) representatives will provide technical guidance on spring and summer term calendar event items including, but not limited to: Completing the Disbursement Eligibility Report and remaining edits, Reconciling remaining program funding and using the Payment Summary, Submitting the Grade and Hour Report, Processing Bright Futures and Florida Student Assistance Grant (FSAG) Summer Funding, and Submitting the Postsecondary Institution Renewal Application. OSFA strongly encourages attendees to be prepared to participate in a Question-and-Answer segment during the session to discuss policies, procedures, and technical reporting requirements regarding the above-mentioned topics.

**Speakers:** Shawn Haskin, Director, State Scholarships and Grants  
FL Department of Education

Pedro Hernandez, Outreach Director,  
Office of Student Financial Assistance, FL Department of

**Moderator:** Laura Dickerson

## Dependency Override & Unaccompanied Homeless Youth

Pompano

Join us for an enlightening session dedicated to understanding the complexities of dependency override and unaccompanied homeless youth designations. Every year, students face challenges in accessing higher education, including navigating financial aid processes without their parents. Dependency overrides and unaccompanied homeless youth designations offer a pathway for these students to qualify for financial aid independently, but it requires careful consideration and understanding of best practices. This session will provide participants with an overview of dependency override and unaccompanied homeless youth designation criteria, procedures, and best practices.

**Speaker:** Chrissy Gass, Director of Scholarships,  
Florida Atlantic University

**Moderator:** Becky Davis

## Averting Danger- Combatting Fraud in Higher Education

Red Drum

We are witnessing a disturbing surge in fraudulent activities in higher education and financial aid. Financial aid administrators have a fiduciary responsibility to report suspected fraud. The objectives of this session are to raise awareness of the startling sophistication of fraud, discuss credit industry mitigants, and campus-wide best practices for deterrence. Just as Title IV administration is a campus-wide initiative, so is the detection and reporting of fraud. The session will highlight an integrated strategy for fraud prevention that includes multiple campus offices as well as external partners such as OIG, credit agencies and lenders. Attendees will gain an understanding of different types of fraud and the methods used by fraudsters, emergence of synthetic fraud that involves creating a new identity by combining real and fake information, latest technologies and strategies used to detect and prevent fraud. Finally, the session will also provide a forum for networking and knowledge sharing among industry professionals and subject matter experts. Join us for this informative and engaging session on combatting fraud.

**Speakers:** Bill Ayers, Head of Campus Development  
College Ave Student Loans

Lakisha Sanders, Assistant VP of Financial Aid and Veteran  
Affairs, Valencia College

**Moderator:** Jeanne Schurman

11:30 AM - 11:45 AM **Transition Break**

11:45 AM - 12:45 PM **Business Partner Lunch and Learn**

11:45 AM - 12:15 PM **MOHELA - Gold Sponsor**

**Amberjack**

How did we get where we are with the return to student loan repayment? How has the environment changed, and what to expect in the future

**Sponsor** Kathy Dixon, Manager, Business Development  
And Creative Design

**Moderator:** Daisy Tabachow

**Oracle - Gold Sponsor: Oracle Student Financial Planning: Spend Time on Students, Not Process**

**Cobia**

The combination of increased competition for students, changing student needs, and an unpredictable regulatory environment makes processing financial aid and delivering exceptional – and affordable – services to students challenging. Oracle Student Financial Planning is a game-changing financial aid solution that manages each student's financial plan individually and provides real-time visibility into a student's academic programs, supporting better Informed financial decisions and optimized outcomes.

**Sponsor** Marco Monteiro, Senior Solution Engineer,  
Oracle

**Moderator:** Ilia Cordero

11:45 AM - 12:45 PM **College Ave - Platinum Sponsor: Meditation for the Fidgety Skeptic A Book Report that Could Change Your Life**

**Pompano**

Science suggests that meditation can lower blood pressure, mitigate depression and anxiety, and literally rewire key parts of the brain, among numerous other benefits." Did you know this? ABC news anchor Dan Harris does, and after having a panic attack on live TV, he's trying his best to share his story with those of us who might not buy into all the "meditation hype." After all, he was the biggest skeptic you could find. In this session, we'll give you the CliffsNotes version of his best-selling book Meditation for Fidgety Skeptics, along with an arsenal of tips and tricks to get your mind to stop racing, even if just for a little while. Please don't be scared there will be no one sitting on floor pillows or group chanting! This is for those of us living in a fast-paced, high-stress world who need to turn off the noise – whether it's at our desk, waiting in line at the grocery store, or lying in bed staring at the ceiling in the middle of the night.

**Sponsor** Bill Ayers, Head of Campus Development,  
College Ave Student Loans

**Moderator:** Kristi Eidson



### **Earnest - Platinum Sponsor**

**Bonito**

Learn the results of Earnest's third annual Survey on Student Engagement in which 555 undergraduate students shared their thoughts on the financial aid process, their experiences, and their attitudes towards advice, decision-making, and working with their financial aid offices. Join us as we transform this data into actionable strategies to better engage with your students and enhance your role in their educational journey.

**Sponsor** Lou Murray, Campus Partnerships,  
Earnest Student Loans

**Moderator:** Jean Imes

12:45 PM - 1:15 PM **Unwind w/FASFAA**

**Great Egret Ballroom**

1:30 PM - 2:30 PM

### **Concurrent Sessions 6**

#### **The Student Loan Repayment Checklist**

**Amberjack**

Many borrowers leave school without a plan for repaying their student loan debt. With everything going on at the end of their college careers, it's not unusual for important student loan information to be missed during online exit counseling. You can help prepare your borrowers by providing them with a student loan repayment checklist. During this session, we'll share those essential items that can make the transition to repayment a successful one.

**Speakers:** Jonathan Reynolds, Director of Student  
Finance, Ultimate Medical Academy

Becky Davis, Regional Marketing  
Director, Ascendium Education

**Moderator:** Alexandria Arnold

#### **Administration of Aid Programs: Awarding, Reconciliation and Cash Management**

**Bonito**

In this session, we'll navigate the complexities of managing financial aid from awarding to reconciliation, and cash management. Explore best practices for determining aid eligibility, awarding funds equitably, and ensuring compliance with regulation.

**Speakers:** Jennifer Rivera, Assistant Director, Financial  
Aid, Florida International University

Joseph Gonzales, Senior Director, Office of  
Student Financial Assistance & Employment,  
University of Miami

Patricia McSparin, Senior Director of Financial  
Aid, Operations, Broward College

**Moderator:** Traci Spagnoli-Rego

### **FAU's Federal Work Study Evolution: Strategies for Student & Staff Engagement**

**Cobia**

In this session, the Federal Work-Study Team at Florida Atlantic University discusses their expansion and insights on optimizing the Federal Work-Study program. Learn successful tips and strategies to boost engagement for both students and staff. Discover how FAU has partnered with their Career Center to shift the program's focus towards on-campus internships to enhance students' work experience in preparation for their future careers.

**Speakers:** Kelsie Conrad, Assistant Director, Federal Work-Study, Florida Atlantic University  
Maria Faber, Financial Aid Fiscal Operations Officer, Florida Atlantic University

**Moderator:** Tim Young

### **2024-25 FAFSA Scenarios/FAFSA Walkthrough**

**Pompano**

Join us for an interactive session designed to equip you with the skills to confidently guide students through the financial aid maze while they complete the FAFSA application. Through small group discussion of realistic scenarios, we'll explore complex situations, brainstorm effective solutions, and build a shared understanding of best practices.

**Speaker:** Katie Conrad, Sr. Associate Director, Financial Aid Florida International University

**Moderator:** Adedayo Lawal

### **Navigating the Maze: FERPA Compliance Demystified**

**Red Drum**

Join us for an insightful session aimed at unraveling the complexities of FERPA (Family Educational Rights and Privacy Act) compliance. In today's digital age, protecting student privacy is paramount, yet understanding the intricacies of FERPA regulations can often feel like navigating a maze. This session will provide clarity and guidance on achieving and maintaining FERPA compliance within educational institutions.

**Speaker:** Maureen Anderson, Financial Aid Services  
Christina Heritage-Acosta, Associate Director of Student Financial Services Systems, Southeastern University

**Moderator:** Susan Ambridge

1:30 PM - 3:30 PM **Exhibit Area Open**

**Great Egret Foyer**

2:30 PM - 2:45 PM **Transition Break**



2:45 PM - 3:45 PM

## Concurrent Sessions 7

### Financial Aid Jeopardy

Amberjack

A fun interactive way to test your financial aid knowledge and learn something new! Great refresher questions for long timers and great training for newbies! Categories include: FAFSA, Potpourri, Verification, Student Loans, and more. Join us in a game of Financial Aid Jeopardy where you will be split up in teams to see who takes home the win.

**Speakers:** Joseph Gonzales, Senior Director, Office of Student Financial Assistance & Employment, University of Miami  
Kathleen Roebuck, Regional Manager, Monogram

**Moderator:** Karissa Lawson

### 2024-25 C-Code Crosswalk & New Requirements

Bonito

Join us for an insightful session aimed at financial aid professionals seeking to navigate the complexities of the 24-25 C-Code crosswalk and the latest requirements. This session is tailored to financial aid officers, administrators, and professionals in educational institutions looking to ensure compliance and optimize financial aid processes.

**Speaker:** Robyn Sollberger, Director of Financial Aid, Campbellsville University

**Moderator:** Coco Tanner

### Paying for Graduate School

Cobia

This session highlights the differences between the Federal Grad PLUS Loan and private student loan programs. The focus of this presentation will be on encouraging responsible borrowing and helping students find the right solutions to help pay for their education.

**Speakers:** Laura Dickerson, Director Relationship Management, Sallie Mae  
Egan Hanson, Director of Financial Aid, Schiller University

**Moderator:** J'Nai Washington

### 2024-2025 Cost of Attendance

Pompano

Join us as we review the elements that shape the cost of attendance (COA), how data is collected to build COA, the FAFSA Simplification changes that impact how your school should build cost of attendance in 2024-2025 and beyond, as well as the requirements you must meet to ensure your school is in compliance.

**Speakers:** Kevin McCrary, Financial Aid Director, Bethune Cookman University  
Lakisha Sanders, Assistant VP of Financial Aid and Veteran Affairs, Valencia College

**Moderator:** Amy Gerber

## Unveiling the Secrets: Reviewing Florida Bright Futures Scholarship Appeals

Red Drum

Delve into the heart of scholarship appeal reviews with our informative session tailored to educators, administrators, and scholarship committee members tasked with reviewing Florida Bright Futures Scholarship appeals. Whether you're a seasoned professional or new to scholarship assessment, this session offers indispensable guidance to enhance your understanding and proficiency in reviewing Florida Bright Futures Scholarship appeals.

**Speaker:** Anita Brown, Assistant Director of Scholarships, University of South Florida

**Moderator:** Timiki Jacobs

3:30 PM

**Exhibitor Area Breakdown**

Great Egret Foyer

3:45 PM - 4:00 PM

**Transition Break**

4:00 PM - 4:30 PM

**Region Meetings**

Join us to meet and network with your Region Representative and region members! Region Representatives will provide members with a region update, discuss current events, listen to your feedback, and discuss future plans for the region.

### Region I

**Speaker:** Angelica Coonts, Region I Representative

Amberjack

### Region II

**Speaker:** Alisha Hunt, Region II Representative

Red Drum

### Region III

**Speaker:** Karissa Lawson, Region III Representative

Cobia

### Region IV

**Speaker:** Merrian King, Region IV Representative

Pompano

### Region V

**Speaker:** Joseph Gonzales, Region V Representative

Bonito

4:30 PM - 5:15 PM

**State College Directors Meeting**

Pompano

**Speakers:** William K. Spiers, Jr., Director of Student Financial Services, Tallahassee Community College

Kamia Mwango, Director, Financial Aid  
Santa Fe College

5:00 PM - 7:30 PM

**Dinner On Your Own**

It's Your Pick!

8:00 PM - 10:30 PM

**FASFAA Fun Night**

Great Egret Ballroom

**Speaker:** Brenda Ilojirole, FASFAA Entertainment Coordinator

**Friday, May 24, 2024**

7:30 AM - 9:00 AM **Breakfast**

**Great Egret Foyer**

9:15 AM - 10:15 AM **General Session 3: Office of the Inspector General**

**Great Egret Ballroom**

In this session, we'll learn about the OIG background and mission, the issue of fraud in Title IV institutions and the effects it can have on institutions, students, and taxpayers. Learn about common types of fraud schemes targeting education institutions, including financial aid fraud, embezzlement, and identity theft. Discover proactive measures and best practices for detecting and preventing fraud, both at the institutional level and within communities.

**Speaker:** Chris Hessberger, Special Agent  
U.S. Department of Education  
Office of the Inspector General

**Moderator:** Dameion Lovett

10:15 AM - 11:30 AM **General Session 4: NASFAA Update**

**Great Egret Ballroom**

Get an update on association activities, professional development and training opportunities, and the volunteer and public policy work of the association. Learn how you can get involved.

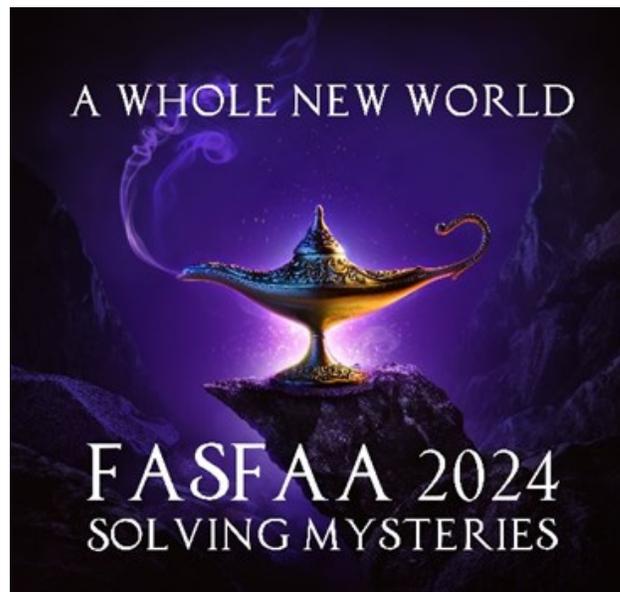
**Speaker:** Helen Faith, 23/24 NASFAA National Chair

**Moderator:** Dameion Lovett

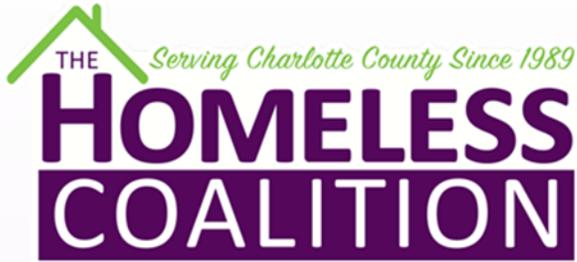
11:30 AM - 12:00 PM **FASFAA Business Meeting Continued and Closing Remarks**

**Great Egret Ballroom**

**Speaker:** Dameion Lovett



# 2023-2024 Charity



Homelessness is a widespread, societal issue that affects every community – even here in the paradise of Southwest Florida. The Homeless Coalition not only provides emergency services such as shelter and food to hundreds of people a year, but it also works with families to secure more financially stable futures. For some people, getting a job can be difficult without a proper form of ID or a dependable ride to work. We can help clients overcome those obstacles so that employment can be secured. We can help families stay in their homes by finding emergency funding to cover electric bills, etc.

It's never hopeless at the Homeless Coalition. The Homeless Coalition finances some of these programs through the Fabulous Finds Re-Sale Shop, where 100% of the proceeds go right back to fighting homelessness. As an impact-driven group, we reinvest a majority of our profits to achieve sustainability, grow our resources, and ensure the fulfillment of our mission to promote a positive impact to our community and resolve homelessness and hunger.

## HOMELESS COALITION Food Pantry Wish List

Macaroni & Cheese  
Peanut Butter  
Jelly  
Potatoes (Box or Can)  
Rice  
Pasta/Rice Side Dishes  
Spaghetti/Tomato Sauce  
Beans  
Canned Meals/Meats  
Canned Vegetables  
Canned Tomatoes  
Soups  
Crackers  
Cereals/Oatmeal  
Single Serve Snacks  
Juice Boxes/Milk Boxes  
Coffee/Creamer

Dedicated to preventing hunger & homelessness in Charlotte County since 1989  
NON-DISCRIMINATION STATEMENT: In accordance with Chapter 91-37.014, Florida Administrative code, Charlotte County Homeless Coalition shall not discriminate on the basis of race, creed, religion, color, age, sex, familial status, national origin or handicap in the selection of recipients for assistance. The information is requested strictly for reporting purposes. No person shall, on the grounds of race, color, sex, religion, age, disability, sexual orientation or national origin be excluded from participation in being denied the benefits of, or be otherwise subjected to discrimination under any program, activity or service from CCHC.



FLORIDA DEPARTMENT  
OF CHILDREN AND FAMILIES  
MYFLFAMILIES.COM



FASFAA's goal is to raise \$2,500 in funds and collect needed nonperishable food items for the Charlotte County Homeless Coalition.

FASFAA is Dedicated To Our Community!

# *Bonnie L. Pirkle Scholarship*

FASFAA established its own scholarship program as a commitment to help deserving students benefit from higher education.

The scholarship was named in memory of a long-time FASFAA member, Bonnie Long Pirkle, who exemplified the highest personal and professional qualities and who embodied the spirit of camaraderie of FASFAA members. Bonnie Pirkle grew up in South Carolina and Georgia in a very close-knit family. Her life in financial aid began when she accepted the position at Hall School of Nursing in Gainesville, Georgia, in 1970. There she rose from the Nursing Department's secretary to Director of Student Services.



Bonnie came to Florida in 1980, upon accepting the Assistant Director position at Daytona Beach Community College. She moved on to Director positions at Central Florida Community College and Seminole Community College. Then, she accepted a Marketing Manager position at Chase Education Finance Center. Throughout her career, Bonnie made time for additional professional activities. Her two favorite tasks were coordinating FASFAA training activities and planning financial aid conferences.

Many things come to mind when describing Bonnie – vivacious, perky, bubbly, caring, thoughtful, warm, welcoming, smiling, but perhaps the one which best describes her is special. To those who came into contact with her, she was special in every way and she made everyone around her feel special too. Bonnie is well-remembered at FASFAA conferences for making every event more fun; for making new people feel welcome and comfortable; for extending herself even at the expense of her own well-being; for her love of dancing; and for her role in arranging the most enjoyable social events at conferences. She touched the lives of everyone she knew and loved – from students who benefited from her personal attention and wisdom, to colleagues she welcomed to association activities, to today's financial aid leaders she taught at workshops, to friends who enjoyed being with her. Bonnie's spirit resides in every FASFAA member whose life she touched.

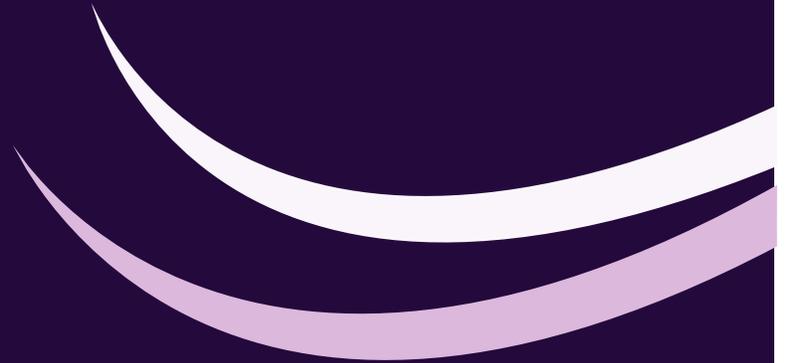


## Photo Alert

During the conference, photographs will be taken. By taking part in this conference your picture may be taken and be shown during the conference to all attending or posted in our social media.

If you do not wish to be photographed please inform the person taking the photo.

Sincerely,  
Joan Bailey



# Vendor Sponsors



# *Thank You!*

TO ALL OUR  
PRESENTERS,  
VOLUNTEERS  
AND  
MODERATORS

IT IS AN HONOR TO HAVE EACH OF YOU SERVE AT THE 2024 FASFAA CONFERENCE. WITH YOUR FANTASTIC EFFORTS, WE WERE SUCCESSFUL IN OUR QUEST TO “**SOLVE THE MYSTERIES**” WHILE EXPLORING A “**WHOLE NEW WORLD**” OF FINANCIAL AID.

**WE APPRECIATE YOU!**

A new Chapter  
FASFAA Annual 2024-2025 Conference

# "Galactic Guardians of a New World"

Mark Your Calendar  
May 26th-May 30, 2025



*Mia Mwangi*  
*2024-2025 FASFAA President*



Dear FASFAA Family,

As we look forward to our next annual conference at the Orlando Grand Hyatt in May 2025, I am delighted to invite you to continue our adventure into the next frontier as "Galactic Guardians of a Whole New World." We will continue exploring the ever-evolving universe of Financial Aid while building on knowledge, wellness, and collaborative innovation forged in this Whole New World of financial aid.

Your participation is the key to our collective success, and together, we will continue to support each other and deepen our community connections. I hope you're excited to reunite next year, to continue learning from our shared experiences, and continue advancing our profession forward. Let's make 2025 another memorable chapter in our FASFAA story!

Mark your calendars and prepare for liftoff May 26-May 30, 2025, in Orlando, FL, as "Galactic Guardians of a Whole New World," dedicated to navigating the dynamic universe of Financial Aid together. Together, we'll chart courses through a Whole New World of knowledge, wellness, and collaborative innovation while supporting each other in holistic wellness. Plan to stay connected with the FASFAA community in May 2025; the conference always delivers an invigorating mix of premier keynotes and breakout sessions that you don't want to miss! Registration will officially open in late February 2025.

Warm regards,

Mia Mwango

2024-2025 FASFAA President









