A lamp unto their feet and a light unto our path.
President’s Message

Dear NCASFAA Members,

I would like to take this opportunity to welcome you to the 2017 Fall Conference at Pinehurst! Rose Mary Stelma and her conference committee have worked painstakingly to create what I am sure will be an opportunity for professional growth, networking and a little bit of fun as well. I believe that each and every one of you will be able to take away something from this conference that will help you in the day to day duties of your office.

We have invited Wood Mason to offer up his ever increasing knowledge on Direct Loans and COD. Elizabeth McDuffie will give us the update on what’s happening inside the beltline in Raleigh. Megan Coval will be here to tell us what to expect from D.C. and what NASFAA is doing to advocate for students and financial aid administrators. Our keynote speaker this year will be Laura Hamilton who will take us down the yellow brick road that is our financial aid offices. We will even get a federal update via cyber space from our favorite fed David Bartnicki.

I hope you are as excited about this conference as I am. Take this time to see how other offices are doing things, visit with those folks you haven’t seen in a while, meet new people and walk the grounds of one of the most prestigious locations in the state. Heck if you have time, not during a session mind you, visit the spa or the driving range. The man who designed the landscape of Biltmore, Frederick Law Olmstead, also designed the village of Pinehurst. This is the first time NCASFAA has ever been to here and I hope you enjoy it and that you take home some memories.

Please remember why we do what we do, to serve as a lamp unto Their feet and a light unto Our path.

Sincerely,

Jason J Johnson
2017-18 NCASFAA President
Keynote Speaker

Laura Hamilton is President of her own speaking, training and consulting business. Laura Hamilton Seminars, Inc. has been conducting seminars, workshops, and keynotes in the area of communication skills for 25+ years. She numbers among her clients, Dell, Chevrolet, GMC Truck, The Home Depot and hundreds of community colleges and non-profit organizations throughout the United States.

A graduate of the University of North Carolina - Greensboro, Laura is a member of the National Speakers Association and has received the coveted, CSP. The Certified Speaking Professional designation has been awarded to fewer than 500 professional speakers in the United States. To contact Laura email her at laurahamiltonseminars@outlook.com or Laura@laurahamilton.com or call 336.310.3975.

Speakers

Megan McClean Coval is NASFAA’s Vice President of Policy and Federal Relations. Megan oversees the Associations’ policy and advocacy efforts. Prior to joining NASFAA in the fall of 2010, she served as the Director of Governmental Relations for the federal Advisory Committee on Student Financial Assistance.

While with the Committee, Megan contributed to several congressionally mandated reports on the postsecondary access and persistence of low- and moderate- income students. Megan began her career in higher education as an admissions counselor at Penn State University. She received a master’s in higher education at Penn State and BA in political science from Allegheny College.

Elizabeth McDuffie is the executive director of the State Education Assistance Authority, a role she has held for three years after serving as director of the Authority’s division of Grants, Training and Outreach for 17 years. Elizabeth earned a Master of Business Administration from Meredith College, a Bachelor of Science in industrial relations and psychology from the University of North Carolina at Chapel Hill and an Associate of Arts degree from St. Mary’s College.
In October 2017, Elizabeth became the president-elect for the National Association of State Student Grant and Aid Programs. She has also served on the executive board of the North Carolina Association of Financial Aid Administrators and as agency liaison for the Southern Association of Student Financial Aid Administrators. In addition, she served a three-year term on the College Board’s College Scholarship Service Assembly Council.

Elizabeth has spent her entire professional career helping students achieve their higher education goals. She began her career in a temporary four-month position in the admissions office at St. Mary’s College while looking for a “real” job. The four-month position stretched to four years before she left St. Mary’s College to work in the financial aid office at North Carolina State University. She left NC State to become director of admissions and financial aid at Louisburg College, and eventually director of financial assistance at Meredith College.

One of Elizabeth’s most rewarding accomplishments was the creation of FAFSA Day, a statewide initiative that assists high school seniors in the completion of their financial aid forms on one Saturday each year. Since 2001, FAFSA Day has helped tens of thousands of North Carolina students and their families complete FAFSAs.

Elizabeth is married to another financial aid administrator, Michael McDuffie, and has two sons, the youngest of which is a junior at NC State University.

**David Bartnicki** has worked for the U.S. Department of Education’s Federal Student Aid Office for over 23 years. He has served as an Institutional Review Specialist, Institutional Improvement Specialist (IIS), Branch Chief for Contract Compliance and is currently a Federal Training Officer. David’s entire government career has been in the Atlanta Regional Office where he currently works directly with over 1,100 postsecondary schools in the Southeast Region.

As a training officer, David provides training and technical assistance on a wide variety of federal student aid topics to schools, state agencies, accreditation bodies and higher education organizations through a variety of state, regional, national and Department venues. While in FSA, David has helped redesign the FSA Assessment Modules, developed the popular “Ask A FED” booth at the annual FSA Conferences, and developed the Department’s compliance review process for ED’s private collection agencies. David serves on the Conference Delivery Team, FSA Training Conference Steering Committee, and the National Verification Team.

In addition, David has received numerous financial aid awards including the 2016 GASFAA (GA) Service Award, the 2014 Certificate of Recognition from the State of Alabama Governor Bentley’s Office; 2013 FSA Award for Most Innovative Team, 2013 FASFAA Distinguished Service Award (FL), 2013 TASFAA Distinguished Service Award (TN), the 2012 SASFAA Distinguished Service Award (Southern Regional), the 2012 AASFAA John H. Buchanan Distinguished Service Award (AL), 2012 MASFAA Special Recognition Award (MS), the 2011 Kentucky “Admiral” Award, 2010 FSA Award for Best Mission Results, the 2005 Florida Public Career Technical Center’s Merit Award, the 2003 SCASFAA Distinguished Service Award (SC), the 2003 AASFAA Award of Merit (AL) and the 2001 NCASFAA Award of Merit (NC).
When not working, David enjoys spending time with his wife, Christy, and sons Luke (17), Adam (17), and Ethan (13).

Dana Kelly has over 25 years of experience working in the higher education community and has been active in multiple state and regional associations. She is currently the Chief Training Officer for NASFAA. Her resume includes being a former President of NCASFAA and an active member of SASFAA severing the region in various volunteer capacities and as a Board member. Dana has also worked as the Director of Financial Planning at High Point University in North Carolina for 12 years.

Additionally, she has worked on both the Lender and Servicer side of student aid. She received her Bachelors of Science degree from Guilford College and she holds a Master’s in Public Administration and a Master’s in Organizational Management. Dana has one daughter, Sloane. She is by far her greatest accomplishment. Dana also has a 4-legged daughter, Allie, who is more person than dog!

Sharon J. Oliver shares her financial aid history with these words:

I have had a rewarding career in financial aid for more than twenty years. I find the work I do in my current position extremely gratifying because I am often afforded an opportunity to empathize with families from diverse economic backgrounds and to encourage them to make their dreams a reality.

I currently serve as the Assistant Vice Chancellor for Scholarships and Student Aid at North Carolina Central University. I have served in various capacities at the postsecondary level including Chief Accountant, Bursar, Enrollment Manager and Director of Financial Aid in the public and private sectors. I am actively involved in the national, state, and regional financial aid professional associations. My personal interest includes volunteering within the community to ensure that families are aware of funding for college. I strongly believe in Mahatma Gandhi’s quote about serving and caring for others: “The best way to find yourself is to lose yourself in the service of others.”
Helping families and students prepare for college.

NOW LIVE
• Residency Determination Service (RDS)

OPPORTUNITIES AND ASSISTANCE FOR YOU AND YOUR INSTITUTION
• New and Experienced Aid Officer Training
• School Counselor Summer Enrichment
• College Funds Installment Payment Plan
• EX$EL Financial Education and Repayment Success
• Verification Service

HELPING STUDENTS AND FAMILIES PREPARE FOR COLLEGE AND CAREER
• Free, Comprehensive Website, CFNC.org
• CFNC Call Center and Regional Representatives
• FAFSA Day and Finish the FAFSA
• NC 529® Plan
• NC Grants
• NC Scholarships

Coming Soon: New parent and student loan program

College Foundation of North Carolina
Helping you plan, apply, and pay for college
goals are shared and college dreams are covered.

PNC connects students with everything they need—from variable and fixed-rate loan options to financial education tools, and an extensive support system to help students throughout their college careers and beyond.

See what we're doing at pncncampus.com or call 1-800-762-1001

Loans subject to credit approval and school eligibility. PNC encourages students to explore all scholarship, grant and federal borrowing options before applying for a private loan.

©2017 The PNC Financial Services Group, Inc. All rights reserved.
PNC Bank, National Association. Member FDIC.

24/7 Financial Aid. GetAnswers educates your students about financial aid through online videos. Our ever-growing library of videos are short, updated regularly, and include question and answer format, tutorials, custom content, and vignettes.

Call 888.704.9090 to learn more or visit www.financialaidtv.com

FEATURES

- Financial Aid Answers 24/7: Help students get answers immediately with self-service content any time of day or night.
- Up to Date Content: We regularly revise our content in light of state and federal regulation changes.
- Customized Portal: Tailored content and branding for your school.
- Enhance Your Website: Transform your school’s website by embedding videos, playlists, or your entire GetAnswers portal.

BENEFITS

- Reduce Phone Calls: By answering repetitive questions in a format students expect today.
- Shorten Wait Times: Concerned about long lines? Provide self-service using online videos.
- Improve Customer Service: Create a multimedia resource for your students that is accessible 24/7.
- Expand Outreach: Reach prospective and currently enrolled students in a format they expect.
Student Success Is A Marathon, Not A Sprint.

Getting your students to the finish line is what matters most. Whether it's answering questions about enrollment, explaining financial aid processes or preventing student loan default, we help students clear the hurdles and achieve success.

Call Center + Financial Aid Outsourcing + Default Prevention + Consulting

Find out how we do it. Call us at 855.493.1785 for more information and check out our case studies at www.edfinancial.com/HES/casestudies.

855.493.1785 | www.edfinancial.com/HES

EdFinancial Services

We make it work one semester at a time.

SunTrust Bank offers students the Custom Choice Loan® to help fill the gap when federal loans, scholarships, and grants aren't enough.

suntrusteducation.com

How can we help you shine?

SunTrust Bank, Member FDIC. ©2014 SunTrust Banks, Inc. SunTrust and the Custom Choice Loan are federally registered trademarks of SunTrust Banks, Inc. How Can We Help You Shine? is a service mark of SunTrust Banks, Inc.
Special Thank You – They Hit a Hole in One!

Tracy Rapp, Haywood Community College, for leading us in the singing of the National Anthem
Sarah Scott of Silver Sun Paper Co. for the program cover art
Lucy Morley and members of the Pinehurst staff for all of their great hospitality
2017-18 NCASFAA Conference Committee members
2017-18 NCASFAA Executive Board members

Conference Charity

EP Legacy

EP Legacy is a non-profit organization with a goal of providing African amputees with prosthetic devices. They are currently raising funds to build a prosthetic lab inside a shipping container. That lab can then be set up on the Ivory Coast to provide services to individuals they are not currently able to serve.

Why the Ivory Coast and Africa? The founder of EP Legacy, Paul Suggs, notes that most amputees in developing parts of the world live in extreme poverty, often on less than a few dollars a day, making it simply unattainable to receive prosthetic care. By providing life changing artificial limbs, the patients are able to provide an income for their families and carry out normal activities of daily living. EP Legacy’s mission is to allow amputees around the world the opportunity to utilize prosthetic devices to improve their lives!

Conference Fund Raising
Steven E Brooks Scholarship

Each year, one NCASFAA member is awarded a scholarship to attend the Southern Association of Student Financial Aid Administrators (SASFAA) New Aid Officers Workshop.

The Brooks Scholarship covers the cost of registration and travel expenses (not to exceed $500.00) for one (1) participant to attend the SASFAA New Aid Officers Workshop. Because this training is so valuable and supports one of NCASFAA’s primary purposes, we’d like to raise enough funds to send two (2) NCASFAA members to the workshop in the summer of 2018!
We make it simple.

Advantage Education Loans, Default Prevention, and Verification—KHEAA makes navigating higher education funding simple.

Uncomplicate Financial Aid

We find new ways to improve confusing and time-consuming financial aid processes so you can focus on your students and their futures.

Helping you manage financial aid.

Inceptia

A division of NSLP

Financial Aid Management | Smart Borrowing
Default Prevention | Financial Education

Connect with us to learn how Inceptia can help you do more of what you do best.

888.529.2028 | Inceptia.org |
Help them invest in their future
The Smart Option Student Loan®

Competitive rates with no origination fee
- Choice of a variable or fixed interest rate
- In-school and deferred repayment options
- Up to 100% coverage of school-certified cost of attendance
- Available for undergraduate and graduate students

New for AY 17 – 18:

Study Starter™: Borrowers can jump-start their studies with a choice of up to 120 free minutes of live, online help from Chegg Tutors™ or free access to Chegg Study® with guided Textbook Solutions.¹

Learn more at SallieMae.com/SmartOption or call us at 855-429-9759

NOT ALL STUDENT LOANS ARE CREATED EQUAL

Our customers agree. That’s why they’ve given us a 5-star rating. See what they’re saying at collegeave.com/reviews

For additional questions, please contact your campus representative
Elizabeth Chance at echance@collegeave.com or (302) 318-1165.

© 2017 College Ave Student Loans. All Rights Reserved
When students and parents have questions about student loans, you can look to us for answers.

With more student loan options than any other lender, we’re here to help you guide your students and their families through the process of choosing the right loan to pay for college.

Have questions? Call our School Services Team at 1-888-333-0248 or email us at schoolservices@citizensbank.com.
There's an easy way to process private loans.
Streamline and simplify with our secure, automated private loan solution.

FASTChoice  ScholarNet®  Central Disbursement Service
Counseling and Loan Selection  Secure, Error-Free Certification  Automated Disbursement

LEARN MORE
Visit schools.mygreatlakes.org
Call (888) 686-6919

GREAT LAKES
Financial Aid Services (FAS) opened its doors in 1991. For over a quarter of a century, we have assisted colleges and universities in effectively managing their financial aid operations. We are grateful for over 25 years of serving the higher education community and look forward to many more years of service!

Atlanta, Georgia • 770-988-9447 • www.FinancialAidServices.org

More than three million students drop out of higher education each year due to financial constraints.

Yes, 3,000,000 students.

We'll Help You
Remove the Barriers.

campuslogic / Learn More / go.campuslogic.com/sfs
Conference Information

Name Badges
Your name badge is attached to the pocket agenda. Wear your name badge at all conference functions. If you misplace your name badge, ask for another one at the NCASFAA registration desk.

Meals and Special Dietary Accommodations
Your name badge is your meal ticket for the luncheons, breaks and breakfasts. Special tickets have been placed in the registration packet for those who indicated a special dietary need. Place that ticket by your plate for both luncheons and Wednesday morning’s breakfast.

Professional Affiliates
We are very excited to have so many of our professional affiliate colleagues with us at Pinehurst. Their organizations provide financial support to NCASFAA. Please take the time to visit with them in Olmsted. They’d love to share information about their products and services. Please show your appreciation for their continued financial support and their other contributions to NCASFAA.

Conference Attire
The attire for this conference is “business casual,” except for Wednesday morning, when you are encouraged to show your school spirit or wear your NCASFAA tee shirt.

There are some special guidelines for attire in these Pinehurst locations:

Carolina Dining Room and 1895 Grille: Business casual attire is to include collared shirt, casual slacks or denim. No flip flops, tennis shoes or hats please. Please refrain from wearing shorts to dinner.

The Deuce Clubhouse: Resort Casual
The conference will take place in the area circled. Conference registration is the starred location on this map.

Meals and general sessions are in the Cardinal Ballroom and the Carolina Hall (lower level). Concurrent sessions are in Tufts, Ross, Callaway, Oakley, and North. Professional Affiliates, the Charity and Fund-Raising activities will be located in Olmsted.

PROFESSIONAL AFFILIATES

NCASFAA wishes to thank the following Professional Affiliates for providing financial and other support to this Association this year. Please visit with them during the conference. They have products and services to offer in support of the job you do on your campus.

**Platinum Level**
College Foundation Inc

**Gold Level**

<table>
<thead>
<tr>
<th>Platinum Level</th>
<th>Gold Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citizens Bank</td>
<td>College Ave</td>
</tr>
<tr>
<td>Financial Aid Services</td>
<td>EdFinancial</td>
</tr>
<tr>
<td>KHEAA</td>
<td>Inceptia</td>
</tr>
<tr>
<td>Campus Logic</td>
<td>PNC Bank</td>
</tr>
<tr>
<td>CMD</td>
<td>SallieMae</td>
</tr>
<tr>
<td>FATV</td>
<td>Great Lakes</td>
</tr>
<tr>
<td>PNC Bank</td>
<td>Wells Fargo</td>
</tr>
<tr>
<td>College Ave</td>
<td>Sun Trust</td>
</tr>
</tbody>
</table>
## Conference Agenda

### Sunday, November 5, 2017

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00–12:30pm</td>
<td>Registration for New Aid Officers Workshop</td>
<td>Foyer (Star on map)</td>
</tr>
<tr>
<td>12:00-5:00pm</td>
<td>R2T4 NASFAA Credential Session</td>
<td>Callaway</td>
</tr>
<tr>
<td></td>
<td>Presenter: Dana Kelly, NASFAA</td>
<td></td>
</tr>
<tr>
<td>12:30-5:00pm</td>
<td>New Aid Officers Workshop</td>
<td>Ross/Tufts</td>
</tr>
<tr>
<td></td>
<td>Committee Chair: Mary Otto</td>
<td></td>
</tr>
<tr>
<td>1:00-3:00pm</td>
<td>Conference Committee Meeting</td>
<td>North</td>
</tr>
<tr>
<td>1:00-5:00pm</td>
<td>Professional Affiliate and Charity Set Up</td>
<td>Olmsted</td>
</tr>
<tr>
<td>3:00-3:30pm</td>
<td>Break for New Aid Officers Workshop, R2T4 Session participants,</td>
<td>Foyer outside</td>
</tr>
<tr>
<td></td>
<td>Executive Board and Conference Committee</td>
<td>Ross/Tufts</td>
</tr>
<tr>
<td></td>
<td>**Warm Sea Salt Pretzel Bites, Crisp Celery, Cool Carrots, &amp; Apple</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dunkers</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Dips:</strong> Hot Caramel, Smooth Chocolate, Peanut Butter, Baked Cheese</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sauce &amp; Cool Ranch Dressing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>**Root Beer, Cheerwine, Peach Iced Tea, Assorted Sodas, Bottled Water</td>
<td></td>
</tr>
<tr>
<td>3:00-4:00pm</td>
<td>Executive Board Meeting</td>
<td>North</td>
</tr>
<tr>
<td>4:00-5:00pm</td>
<td>Financial Review – Budget and Finance Committee</td>
<td>North</td>
</tr>
<tr>
<td>6:00pm</td>
<td>Dinner – by Invitation</td>
<td></td>
</tr>
</tbody>
</table>

### Monday, November 6, 2017

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:15–7:45am</td>
<td>Continental Breakfast for New Aid Officers Workshop, R2T4 Session</td>
<td>Foyer outside</td>
</tr>
<tr>
<td></td>
<td>participants, Executive Board, and Conference Committee</td>
<td>Ross/Tufts</td>
</tr>
<tr>
<td></td>
<td>**Southern Style Apple Muffins, Mini Cream Cheese Cinnamon Buns,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pecan Tartlets, Rosemary Asiago Biscuits</td>
<td></td>
</tr>
<tr>
<td></td>
<td>**Sliced Freestone Peaches with Whipped Cream &amp; Peanut Brittle</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Coffee, Tea, Assorted Sodas, Mineral Waters</td>
<td></td>
</tr>
<tr>
<td>8:00-11:30am</td>
<td>New Aid Officers Workshop continues</td>
<td>Ross/Tufts</td>
</tr>
<tr>
<td>8:00-1:30am</td>
<td>R2T4 NASFAA Credential Session continues</td>
<td>Callaway</td>
</tr>
<tr>
<td>8:00-11:45am</td>
<td>Registration</td>
<td>Foyer (Star on map)</td>
</tr>
<tr>
<td>8:00-10:00am</td>
<td>Professional Affiliate and Charity Set Up</td>
<td>Olmsted</td>
</tr>
<tr>
<td>12:00-3:00pm</td>
<td>Opening Session, Luncheon, Keynote Speaker, and Washington Update</td>
<td>Cardinal Ballroom</td>
</tr>
</tbody>
</table>
Welcome and NCASFAA Update  
Jason Johnson, NCASFAA President

Keynote  
Laura Hamilton

Washington Update  
Megan Coval, NASFAA

Lunch Menu  
House Salad with Pinehurst Peach-Pecan Vinaigrette and Peppercorn Ranch Dressings  
Grilled Chicken Breast with Corn Risotto  
Garlic Braised Rapinis, Blistered Baby Tomatoes, Basil Extra Virgin Olive Oil, Sun Dried Tomato Sauce  
Fresh Baked Rolls with Butter  
White Chocolate Tiramisu with Raspberry Coulis & Coffee-Infused Anglaise  
Coffee, Tea, Water

3:00-3:30pm  
Beverage Break  
Coffee, Tea, Assorted Sodas, Mineral Water  
Olmsted and Foyer

3:30-4:30pm  
Community College Sector Caucus  
Cardinal Ballroom

3:30–4:30pm  
UNC Sector Caucus  
Ross/Tufts

3:30–4:30pm  
Independent Colleges and Universities Sector Caucus  
Callaway

3:30–4:30pm  
Professional Affiliates Sector Caucus  
Olmsted

3:30–4:30pm  
Proprietary Campuses – please meet at the Registration desk for your location

Evening on your own  
Enjoy the Pinehurst and Southern Pines area as you spend some time dining with your friends and colleagues

---

**Tuesday, November 7, 2017**

7:00-8:00am  
Continental Breakfast  
Fresh House-Made Muffins, Coffee Cakes and Fruit Breads, Fruit Coffee, Tea, Orange Juice, Grapefruit Juice, Assorted Sodas, Mineral Waters  
Olmsted and Foyer

8:00am-12:15 pm  
Professional Affiliate and Charity Exhibit Area Open  
Olmsted

8:00–9:15am  
Connecting SAP to Retention – Best Practices  
Presenter: Dan Dreves, FATV  
Moderator: JaVonna Bell, Central Carolina Community College  
Ross

This best practice session includes a school panel. We all want to ensure students are successful and graduate, but we know some will struggle along the way. This interactive, school panel session will discuss
how Satisfactory Academic Progress (SAP) relates to retention. Learn the importance of a proactive communication strategy about SAP to ensure retention as you review SAP principles. The discussion will include how schools are actively communicating with students about SAP and will share best practices.

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00–9:15am</td>
<td><strong>Colleague Update for NC Community Colleges</strong></td>
<td>Tufts</td>
</tr>
<tr>
<td></td>
<td>Presenter: Antone McClain, NCCCS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Moderator: Heather Perry, Nash Community College</td>
<td></td>
</tr>
<tr>
<td></td>
<td>This session is to provide updates to the North Carolina Community College financial aid administrators.</td>
<td></td>
</tr>
<tr>
<td>8:00–9:15am</td>
<td><strong>Life Cycle of a Direct Loan</strong></td>
<td>Oakley</td>
</tr>
<tr>
<td></td>
<td>Presenter: Wood Mason, FSA</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Moderator: Kasie Odom, William Peace University</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Follow a Federal Direct Loan from inception to “Paid in full.”</td>
<td></td>
</tr>
<tr>
<td>8:00–9:15am</td>
<td><strong>Meeting Facilitation – Turn Hate to Love</strong></td>
<td>Callaway</td>
</tr>
<tr>
<td></td>
<td>Presenter: Julie Hartmann, CFI</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Moderator: Kali Brown, Vance-Granville Community College</td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is true that no matter what you do for work...you are likely required to participate in some form of work meeting on a regular basis. It is also true that meetings are universally dreaded. During this session, we will explore why meetings are often so painful and unproductive and the steps that you can take to change that dynamic. A little facilitation is all you need...</td>
<td></td>
</tr>
<tr>
<td>8:00–9:15am</td>
<td><strong>Training and Support for New Aid Officers</strong></td>
<td>North</td>
</tr>
<tr>
<td></td>
<td>Presenters: Jane Kanipe, NCSEAA</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Melody Lawrence, Southwestern Community College</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mary Otto, Campbell University</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Jamie Pendergrass, NC State University</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Moderator: Dori Barron, Western Piedmont Community College</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Talk with experts from different size institutions for advice on training. Learn how they train their own staff, both new and seasoned. How do they receive the resources needed for training? How do they keep up with “ever-changing regulations”? Ask them any additional questions you. They will provide their insights from a large, medium and small institution perspective. Receive suggestions, including resources, for training new staff when there is no time to do so. NCASFAA training opportunities and mentoring program will also be highlighted.</td>
<td></td>
</tr>
<tr>
<td>9:15–9:30am</td>
<td><strong>Beverage Break</strong></td>
<td>Olmsted and Foyer</td>
</tr>
<tr>
<td></td>
<td><em>Coffee, Tea, Assorted Sodas, Mineral Water</em></td>
<td></td>
</tr>
</tbody>
</table>
9:30–10:45am  Time Management for the Overworked and Overwhelmed  
Presenter: Julie Finn, Cognition Financial  
Moderator: Jeremy Lambert, Vance-Granville Community College

We all have the same amount of hours in the day, but why do some people seem to get so much more done than others? If you are like most of us, you have attended the sessions, heard the tips and know what you’re supposed to do, but still have not mastered the ever so important skill of time management. We will take a look at several different strategies as well as mindsets that can improve your ability to be more productive and less stressed both at work and at home. Time management does not have to be your Achilles heel any longer!

9:30–10:45am  Working with Local Counselors and TRIO Groups  
Presenters: Sabrina DeGain, Alamance Community College  
Linda Crisp, TRIO Programs  
Samantha Seligman, Alamance County Schools  
Moderator: Rashonn Albritton, SEAA

Sharing of best practices for working with local school counselors and TRIO programs. Hear from TRIO and school counselors about what they need from their local financial aid office to best serve their students. Come learn about programs and initiatives that have worked and also what has not worked.

9:30–10:45am  COD Update  
Presenter: Wood Mason, FSA  
Moderator: Michelle Hemmer, William Peace University

What’s new in the Common Origination and Disbursement system?

9:30–10:45am  Issues of Veteran Students with Financial Aid  
Presenter: Rachel Cavenaugh, Cape Fear Community College  
Moderator: Beverly Billings, Davidson County Community College

This session will explore financial aid issues that students who are veterans face when they are entering college.

9:30–10:45am  State Grants and RDS Update  
Presenters: Traci Mitchell, CFI  
Shannon Byers, CFI  
Moderator: Regina Anglin, Fayetteville Technical Community College

The State Grants and RDS Update will cover changes to State Grants and RDS as well as common questions received by campuses in regards to the changes.

10:45 am – Transition Break - Take a few minutes to talk with your  
Olmsted and Foyer
Succession Planning for Financial Aid Administrators
Presenter: Wanda White, NCCCS
Joyce Valentine, NCCCS
Moderator: Nancy Beasley, Wake Technical Community College

Succession planning is a systematic and comprehensive planning process that addresses the leadership’s needs at every important level and for every key position on college campuses. It also focuses on jobs that are crucial to the continuing well-being of institutions. The Financial Aid Director position is crucial to all colleges and universities. Participants attending this succession will gain an understanding of how to create a financial aid succession plan. Creating a succession plan will help to ensure that your state organization and/or college maintains a supply of qualified financial aid administrators who are professionally ready to fill the Director’s position when a vacancy occurs. Participants will learn how to safeguard their institutions from being without a financial aid director/administrator for an extended period which could otherwise create compliance issues.

Financial Aid and High School Counselors
Presenters: Rae Johnson, School Advisory Council
Kate Cushman, School Advisory Council
Moderator: Marcia Weston, SEAA

Often times, high school counselors are the 1st source of information about financial aid. Join us as we continue to explore how to make the relationship between counselors and the Financial Aid Office more beneficial to not only both parties- but to students and parents especially.

Strategies for LGBTQ+ Inclusion
Presenter: Elliott Kimball, UNC-Greensboro
Moderator: Shaquera Clawson, Appalachian State University

This workshop will provide an overview of LGBTQ+ identities, focusing on how financial aid administrators can implement strategies to be more inclusive of all students in their daily work.

NASFAA Quiz Show
Presenter: Dana Kelly, NASFAA
Moderator: Kelli Hand, Catawba College

Have you ever wondered if your colleagues ask the same regulatory questions you do? This session will review the top AskRegs questions NASFAA members have posed this year. In addition to providing answers, this session will review requirements and best practices related to these top issues.
This session will examine the mandated aspects of verification and will give participants the opportunity to ask “those” questions.

12:15-2:00 pm Luncheon, Professional Affiliate Appreciation and SASFAA Update

NCASFAA Comments and Professional Affiliate Appreciation
   Jason Johnson, NCASFAA President
SASFAA Update
   Sharon Oliver, SASFAA President

Buffet Menu
Carolina Farm Greens, Local Tomato, Southern Fixin’s and Mason Jar
Shaken Dressing Finished Creamy Appalachian Style; Smoked Chicken
and Apple Salad, Celery, Shaved Sweet Onion, Garden Herbs, Light
Orange Vinaigrette
Uncle Jessie’s Potato Salad; Moore County Creamy Cabbage Salad
House Pickled Vegetables
Buttermilk and Herb Southern Fried Chicken; Pig-Picked BBQ Pork with
BBQ. Sweet Carolina and Honeysuckle Mustard Sauces; Baked Tilapia
with Apple Cider Tarragon Beurre Blanc; Hill Country Collard Greens
with Ham Hocks; Mashed Redskin Potatoes with Black Pepper Gravy;
Buttered Green Beans and Crispy Tobacco Onions
Roasted Pepper Spoon Bread and Cheddar Cheese Biscuits
Peanut Butter Pie, Strawberry Shortcake, Banana Pudding, and Apple
Buckle

2:00-4:30 pm Professional Affiliate and Charity Exhibit Area Open

2:00–3:15 pm Strategies for LGBTQ+ Inclusion
   Presenter: Elliott Kimball, UNC-Greensboro
   Moderator: Kendra Simmons, Surry Community College

This workshop will provide an overview of LGBTQ+ identities, focusing
on how financial aid administrators can implement strategies to be
more inclusive of all students in their daily work.

2:00–3:15 pm Difficult Conversations – Managing Conflict While Providing
Customer Service
   Presenter: Biz Daniel, Great Lakes
   Moderator: Shannon Witherow, University of North Carolina –
   Chapel Hill

Do you know how to deal with difficult situations in a positive way? This
session will demonstrate proven techniques for diffusing conflict while
providing great customer service. The financial aid process can be frustrating and emotionally challenging for both parents and students. This heightened anxiety can play itself out in your office when parents and students express their anger and frustration. Your team’s ability to diffuse a difficult conversation and create a problem-solving approach is crucial to your customer service effort. Specific topics covered include: Bridging conflict management and customer service; using reflective listening to gain control; depersonalizing anger and emotion; strategies for problem-solving that result in trust.

2:00–3:15 pm  Loan Reconciliation
Presenter: Wood Mason, FSA
Moderator: Kimberly Hight, University of North Carolina - Charlotte

Get some tips on reconciling your records with FSA’s records.

2:00–3:15 pm  Verification
Presenter: Dave Gelinas, Davidson College
Moderator: Derrick Gill, Shaw University

This session will examine the mandated aspects of verification and will give participants the opportunity to ask “those” questions.

2:00–3:15 pm  FERPA HEA Privacy Act- Protecting Students Data
Presenter: Sharon Oliver, North Carolina Central University
Moderator: Emily Jarrell, South Piedmont Community College

Sharing student data has suddenly changed. Have you provided award details or FAFSA data to third-party agencies for scholarships, SNAP, rental agencies, DCTAG, PHEAA, GRE waivers, etc.? The White Paper on Financial Aid Data sharing was first published summer 2016 and was a hot topic during the NASFAA Conference. The White Paper was republished with additional restrictions in June, 2017. This session will examine the ins and outs of data sharing and provide specific examples to adhere to this new policy. Join this session to learn how to disseminate private data to external agencies, campus partners, and students while complying with federal regulations.

3:15–3:45 pm  Beverage Break
Coffee, Tea, Assorted Sodas, Mineral Water

3:45–5:00pm  Top Five State Program Review Findings
Presenters: Cheryl Sauls, NCSEAA
Chantee’ Favors, NCSEAA
Moderator: Anton Levister, University of North Carolina - Pembroke

This session will highlight the top five findings that are commonly found in State program reviews and what your school should be looking for to stay in compliance.
3:45–5:00pm State Grant Refund Basics
Presenter: Lisa Koretoff, Guilford Technical Community College
Moderator: Lori Blevins, Davidson County Community College

This session will review the basics of calculating state refunds, from determining when the refund calculation should be performed to using the College Foundation website to complete the process. Sample calculations will be performed in this session so bring your calculator!

3:45–5:00pm Subsidized Loan Usage
Presenter: Wood Mason
Moderator: Kathryn Marker, SEAA

Tips for tracking and monitoring how SULA.

3:45–5:00pm Resolving Citizenship Issues
Presenter: Dana Kelly, NASFAA
Moderator: Sara Rodriguez, University of North Carolina - Charlotte

This session will review and explore citizenship requirements. We will also look at questions NASFAA has received on this topic. Discover what’s being asked and learn more about the “alphabet soup” that accompanies this topic.

3:45–5:00pm New Directors Panel Discussion
Presenters: Andrea Simpson, Surry Community College
Cathy Shell, Lees-McCracken College
Robert Muhammad, Winston-Salem State University
Moderator: Brenda Long, Carteret Community College

This session is for new financial aid directors (3 years or less experience as a director) and will be an interactive round table discussion. The role of financial aid director has become increasingly complex and challenging and directors wear many hats: counselor, manager of budgets, supervisor, implementer of regulations, keeper of data, juggler/tight rope walker, and magician with excellent communication skills just to name a few. This session is an opportunity to share some of your experiences in your new role and gain some advice, wisdom, best practices, and learn the pit falls to avoid from seasoned directors.

Evening on your own
Enjoy the Pinehurst and Southern Pines area as you spend some time dining with your friends and colleagues.

Wednesday, November 8, 2017

8:00-9:00am Breakfast
Cardinal Ballroom

Menu
Farm Fresh Scrambled Eggs; Over-Baked Provencal Tomato; O’Brien Potatoes; Applewood-Smoked Bacon
Assorted House-Baked Breakfast Pastries, Pinehurst Muffins, and Country Biscuits with Whipped Butter, Fruit Preserves and Honey
Orange Juice, Cranberry Juice, Coffee, Tea, Milk

24
9:00-11:30am  Closing Session

State Update
   Elizabeth McDuffie, NCSEAA
Federal Update
   David Bartnicki, FSA
Closing Comments
   Jason Johnson, NCASFAA President

Have a safe trip home.

We’ll see you at the Spring 2018 NCASFAA Conference

April 9-11, 2018 in Wrightsville Beach
2017-18 Executive Board

Jason Johnson – President
Jamie Pendergrass – President-Elect
Traci Mitchell – Secretary
Zilma Lopes - Treasurer-Elect
RaChele Summers – Diversity/Global Issues Co-Chair
J D Gibbs – Membership Chair
Nadine Ford, Professional Advancement – Intermediate Aid Officers Chair
Kendra Simmons – Professional Advancement – Webinars Chair
Rose Mary Stelma – Fall 2017 Program Chair and Agency Liaison
Lisa Koretoff – State and High School Relations – Chair
Rachel Cavenaugh – Spring 2018 Program Chair

Andrea Simpson - Immediate Past President
Sarah Evans - Vice President
Karen King - Treasurer
Melody Lawrence – Budget and Finance Chair
Joel Trogdon – Legislative Advisory Chair
Laura Misner – Middle School Enrichment Scholarship Chair
Mary Otto – Professional Advancement – New Aid Officers Chair
Janee Knippenberg – Professional Affiliates Chair
Tyler Cook - Publicity and Publications Chair
Cedric Barksdale - Technology Chair

2017-18 Conference Committee

Cedric Barksdale Crystal Ferguson Katrina Lee Dan Sanchez
Kali Brown Nadine Ford Zilma Lopes Tonnette Sears
Rachel Cavenaugh Stella Galyean Kathryn Marker Kendra Simmons
Tyler Cook J D Gibbs Kyle McMahan Rose Mary Stelma
Sabrina DeGain Julie Hartmann Jonah Miller Merry Taylor
Preston Dodson Jason Johnson Traci Mitchell Precious Ward
Sarah Evans Karen King Mary Otto Marcia Weston
Lydia Faison Janee Knippenberg Cecil Outlaw
ADDED after program printed – Amanda Buchanan
<table>
<thead>
<tr>
<th>YEAR</th>
<th>NAME</th>
<th>YEAR</th>
<th>NAME</th>
<th>YEAR</th>
<th>NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-18</td>
<td>Jason Johnson</td>
<td>2016-17</td>
<td>Andrea Simpson</td>
<td>2015-16</td>
<td>Joey Trogdon</td>
</tr>
<tr>
<td>2014-15</td>
<td>Cathy Shell</td>
<td>2013-14</td>
<td>Rachel Cavennaugh</td>
<td>2012-13</td>
<td>Bridget Ellis</td>
</tr>
<tr>
<td>2011-12</td>
<td>Kim Driggers</td>
<td>2010-11</td>
<td>Paul Coscia</td>
<td>2009-10</td>
<td>Lisa Koretoff</td>
</tr>
<tr>
<td>2008-09</td>
<td>Amy Berrier</td>
<td>2007-08</td>
<td>Tony Carter</td>
<td>2006-07</td>
<td>Rance Jackson</td>
</tr>
<tr>
<td>2005-06</td>
<td>Dana Kelly</td>
<td>2004-05</td>
<td>Sharon Oliver</td>
<td>2003-04</td>
<td>Bruce Blackmon</td>
</tr>
<tr>
<td>2002-03</td>
<td>Rose Mary Stelma</td>
<td>2001-02</td>
<td>Wanda White</td>
<td>2000-01</td>
<td>Lisanne Masterson</td>
</tr>
<tr>
<td>1999-00</td>
<td>Janet Nowicki</td>
<td>1998-99</td>
<td>Larry Garrison</td>
<td>1997-98</td>
<td>Kay Stroud</td>
</tr>
<tr>
<td>1987-88</td>
<td>Shirley Kool</td>
<td>1986-87</td>
<td>Mary Garren</td>
<td>1985-86</td>
<td>Steve Brooks</td>
</tr>
<tr>
<td>1984-85</td>
<td>Louise Nowicki</td>
<td>1983-84</td>
<td>Linda Yokeley</td>
<td>1982-83</td>
<td>Carl Malpass</td>
</tr>
</tbody>
</table>