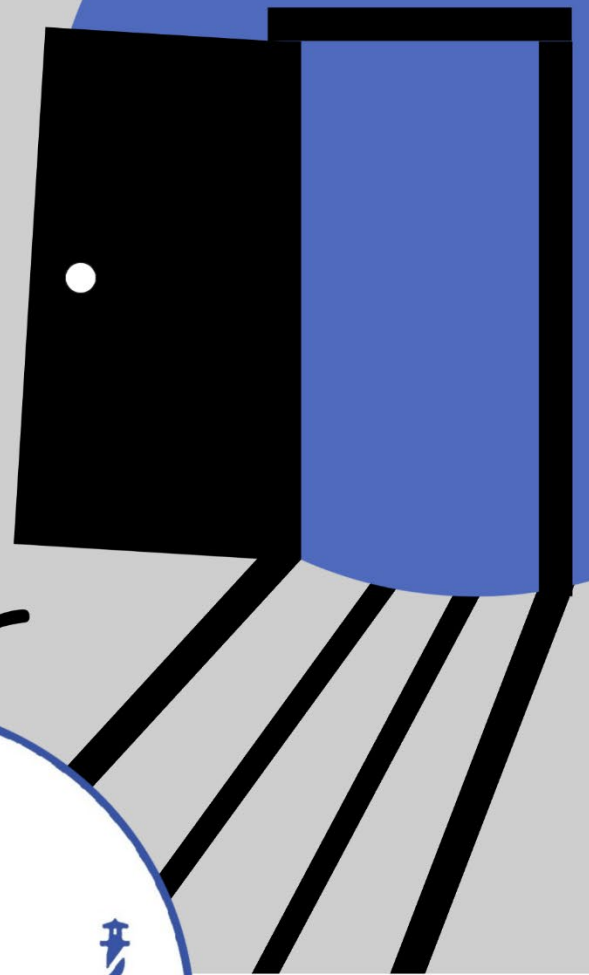
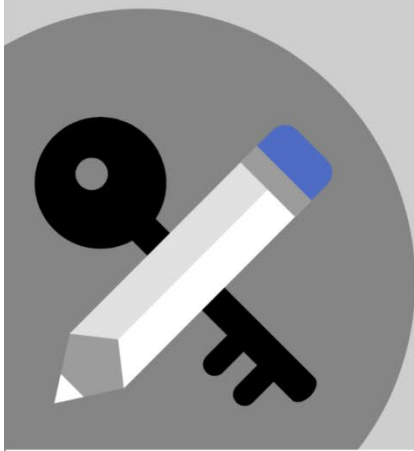


**ENSURING
ACCESS**

FOR ALL



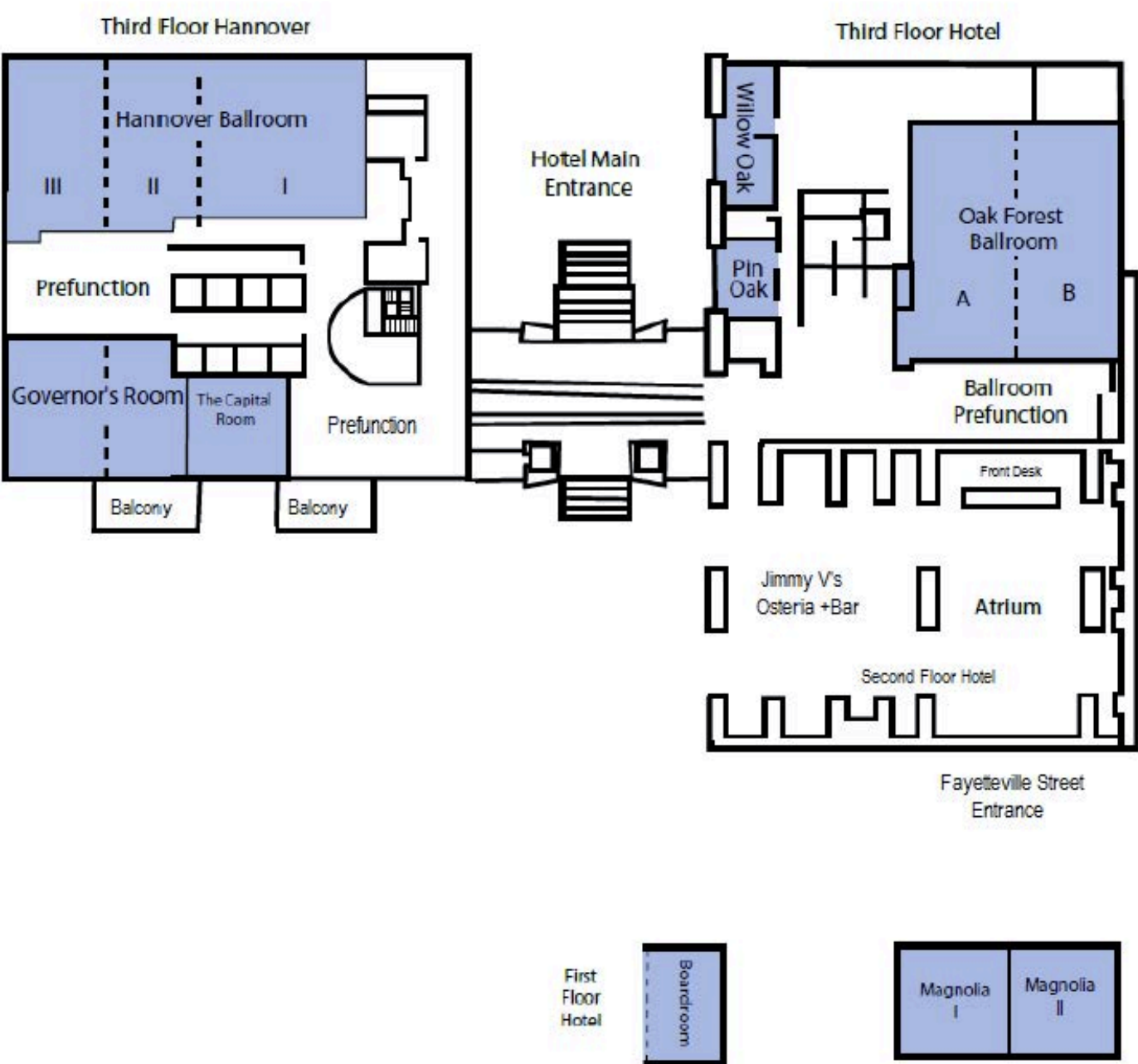
**November
3-6, 2019**

**Raleigh,
North Carolina**

**North Carolina Association of Student Financial
Aid Administrators**

Fall Training Conference

Conference Venue Map





NCASFAA Family,

Welcome to your 2019 NCASFAA Fall Conference!

The Executive Board and various committees are excited to host our NCASFAA colleagues in our state capitol, Raleigh. Our Conference Committee, chaired by Amy Berrier, has been working very hard to ensure that the conference is educational, fun, collaborative, and collegial.

As we come together over the next few days, I hope that we all will take time to engage one another, share expertise, anecdotes and recharge our batteries. The concurrent session topics will allow you various opportunities for engagement and professional growth. We have also considered that our host venue, the Sheraton Raleigh Hotel, is centrally located and offers great opportunities for exploration, dining and socializing.

It is an honor to have as our keynote speaker, Lon Hodge and his service dog sidekick, Gander.

A few years ago, the American Humane Association recognized Gander as "Service Dog of the Year." Lon is a veteran and advocate for veterans' concerns. Gander and Lon travel as they perform Planned Acts of Community Kindness (PACKS) and do fundraising.



Our chosen charity is National Alliance on Mental Illness, North Carolina (NAMI NC). The organization has worked for over 30 years with dedicated community volunteer leaders to assist and support people affected by mental illness to build better lives. The platforms include peer education, state advocacy, raising public awareness, providing support and resources. I am excited that NAMI NC's Executive Director, Dr.

Garry Crites and its Development and Special Events Manager, Lindsey Taylor will be presenting for us during a concurrent session.

SASFAA President-Elect, Celena Tulloss (Senior Associate Director, University of Tennessee Knoxville) will deliver a SASFAA Update. Elizabeth McDuffie (Executive Director at NC State Education Assistance Authority) will deliver an update from the State. Lastly, our "favorite Fed", Dave Bartnicki, will provide us with a Federal Update (and present concurrent sessions).

I and your Executive Board are excited to be with you over the next few days. Please let me/us know if you need anything. We hope that you enjoy your time and that we provide you with tools that will assist in "ensuring access to all..." #WeAreNCASFAA!

Thanks and Best,

Robert Muhammad
NCASFAA President

Letter from the Governor



State of North Carolina Office of the Governor

Roy Cooper
Governor

November 4, 2019

20301 Mail Service Center
Raleigh, N. C. 27699-0301

Dear Friends:

It is my pleasure to welcome members and participants of the North Carolina Association of Student Financial Aid Administrators to your Fall 2019 Conference.

I sincerely appreciate NCASFAA's commitment and advocacy on behalf of financial aid professionals. Your work makes it possible for students across North Carolina to have the chance to obtain an education which fulfills their dreams and ambitions. Your work is important and makes a positive difference in the lives of those students.

Again, thank you for what you are doing, and I look forward to working with you in the coming years. I hope you will enjoy your stay here in our beautiful Capital City.

With warm personal regards, I am

Very truly yours,

A handwritten signature of Roy Cooper in black ink.

Roy Cooper

RAC/sm

*Have a great
Conference!*

Keynote Speaker

Lon Hodge is a former professor of literature and psychology, a military officer, poet, writer and journalist. He is a past director of employee assistance at Rex Hospital and later the clinical director of Amethyst Hospital in Charlotte, North Carolina. Lon also taught at the University of North Carolina at Charlotte.

Lon and his award-winning service dog, Gander, travel the country doing seminars related to veteran's issues and disability advocacy.

Gander was the 2014 AKC Service Dog of the Year, and the 2016 American Humane Association Service Dog of the Year. He has two documentary movies, a Hallmark special, and a PBS special dedicated to his service work.

Lon runs the non-profit organization Operation Fetch. In the last seven years, they have donated survival equipment and adaptive equipment to people through what they call PACKS: Planned Acts of Community Kindness. This donated equipment is valued at more than several hundreds of thousands of dollars.

To date, Lon and Gander have traveled to 46 states, done over 300 seminars together and assisted in raising over \$2 million for animal welfare, suicide prevention and veteran causes.



General Session Speakers



Dameion Lovett leads the financial aid office's retention and graduation rate efforts related to financial aid for the USF Tampa campus. Dameion also manages the financial education program that oversees the financial literacy of the Tampa campus undergraduate students, guiding the program to be LendEdu's #1 ranked Financial Aid Counseling Program for 2018 and #11 ranked Financial Literacy Program for 2019. Dameion also oversees the document intake for the main financial aid office, which includes document imaging and document upload via the student portal and has implemented two different document imaging solutions while at USF. Dameion also oversees all outreach activities for both University Scholarships & Financial Aid Services and the Financial Education Program and has worked in financial aid at USF since 1997 at various levels of progressive responsibility (graduate assistant to campus director).

Dameion established a chapter of the student organization Enactus in 2005. These students created the on-campus suit-lending store Suit-A-Bull. The organization won 17 national awards. Student members also implemented the Refill-A-Bull water stations in buildings around campus, saving students millions of dollars each year.

Dameion is the 2019-2020 President-Elect of the Florida Association of Student Financial Aid Administrators (FASFAA). Dameion has provided numerous presentations for the National Association of Student Financial Aid Administrators (NASFAA), the Southern Association of Student Financial Aid Administrators (SASFAA), the Florida Association of Student Financial Aid Administrators (FASFAA), The College Board, and The Higher Education Financial Wellness Summit. Dameion has also served on the SASFAA 20/20 Diversity Committee. Dameion served a two-year term as the FASFAA Region IV Representative. Dameion also served a term as FASFAA Financial Literacy/Debt Management Outreach Coordinator.

Serving in several positions throughout his 20-year career, Dameion has worked as a Senior Financial Aid Officer, Outreach Coordinator, Assistant Director of Intake and Outreach Programs, Associate Director of Financial Education and Outreach Programs, as well as Campus Director of Financial Aid at the University of South Florida. Dameion earned his B.A. in Psychology and his B.A. in Sociology from the University of South Florida and an M.Ed. in Curriculum and Instruction, with a Concentration in Student Affairs from the University of South Florida in 1999.

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 Vice President of Professional Development and Institutional Compliance for NASFAA. Her resume includes being a former President of NCASFAA and an active member of SASFAA serving the region in various volunteer capacities and as a Board member. Dana was formerly the Director of Financial Planning at High Point University in North Carolina for over 12 years. Additionally, she has worked on both the Lender and Servicer side of student aid. She received her Bachelor's of Science degree from Guilford College and she holds a Master's in Public Administration and a Master's in Organizational Management. Dana has daughter, Sloane, now a college sophomore, who is by far her greatest accomplishment.



Elizabeth McDuffie has been the Executive Director of the North Carolina State Education Assistance Authority since December 2014 after serving as Director of Grants, Training and Outreach at the Authority 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.

With over thirty-six years in the financial aid profession, Elizabeth has worked in financial aid offices at public and private two-year and four-year institutions in North

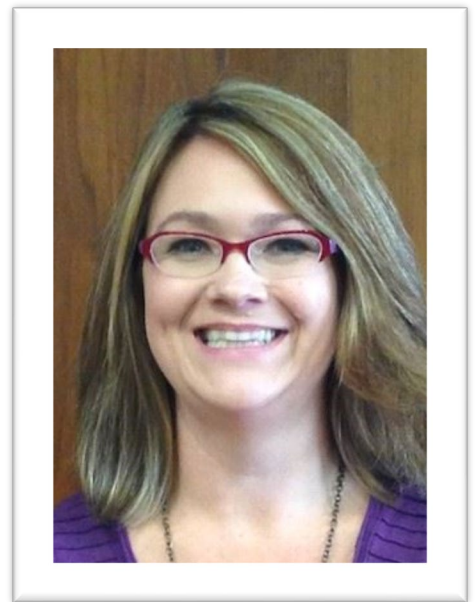
Carolina as well as the state agency.

She currently serves as president of 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 Scholarship Service Assembly Council.

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 February. Since 2001, FAFSA Day has helped tens of thousands of North Carolina students and their families complete FAFSA's.

Elizabeth is married to a retired financial aid administrator and has two sons, the youngest of whom is a senior at NC State University.

Celena Tulloss serves as the Senior Associate Director in the Office of Financial Aid and Scholarships at the University of Tennessee Knoxville. Prior to joining the team at Tennessee, Celena served as the Executive Director of Financial Aid at Lincoln Memorial University. Celena has held many different leadership positions in the state and regional associations, including Electronic Services Chair, Conference Chair, New Aid Officer Workshop Instructor, TASFAA President and was a member of the inaugural class of the SASFAA Leadership Symposium. She currently serves as SASFAA President-Elect. Celena holds a Masters degree in Education Leadership. She enjoys cooking, the lake, and spending time with her family, husband Scott, daughter Carrigan and their three curly white dogs.



David Bartnicki has worked for the U.S. Department of Education's Federal Student Aid Office for over 25 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 with over 6,000 postsecondary schools across the country. 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 Fundamentals Redesign Team, 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 (19), Adam (19), and Ethan (15). And of course, Zyke, the world's cutest dog!



Special Thanks:

Dana Kelly, NASFAA

NC State University Army ROTC—presentation of colors

Benjamin Helms, Western Carolina University student, program cover art

Lon Hodge and Gander

St. Augustine's University Chamber Singers

Silent Auction donors for the charity

2019-2020 Executive Board Members

2019-2020 Conference Committee Members

Directors' Roundtable - Rachelle Feldman, Bruce Blackmon, Nadine Ford, Sherri Avent, and Rachel Cavanaugh

New Aid Officers' Workshop - Dr. Monty Hickman and presenters

Dr. Garry Crites and Lindsay Taylor - National Alliance on Mental Illness, North Carolina

2019-2020 Professional Affiliates

Mr. Peter Hans - President of the NC Community College System

Juliann Kasza and Daniel Hackley - North Carolina State University

Dameion Lovett - FASFAA President-Elect

Celena Tulloss - SASFAA President-Elect

Major Ian Kendrick and Senior Officer Nate Hitchings - North Carolina State University Police Department

Bradley Wrenn - Director of Military-Affiliated Services - UNC Greensboro

Debra Slade - Assistant Director for Outreach - UNC Greensboro

Linda Paulhus - William Peace University

Dr. Joyce Valentine - NC Community College System

Dr. Michael Magruder - Winston-Salem State University

Deborah Tollefson and John Lucas – UNC Greensboro Financial Aid Office

Mellow Mushroom



Conference Information

Name Badges are attached to the pocket agenda. Wear your name badges at all conference functions. If you misplace your name badge, notify a volunteer at the NCASFAA registration desk. If you received a neck wallet at a prior NCASFAA conference, bring it with you.

Meals

See conference program for more information.

Professional Affiliates

Take the opportunity to show your appreciation to the professional affiliates for their continued support and contributions to NCASFAA.

Conference Attire

The conference attire will be business casual. School apparel or colors are encouraged for Monday night entertainment and Wednesday morning closing session.

Conference Hashtag

Sharing your photos of the Fall Conference on social media? Be sure to include the hashtag #WeAreNCASFAA, so that your colleagues can easily find them on Facebook, Instagram, or Twitter. The Conference Committee will be compiling social media posts tagged with #WeAreNCASFAA and featuring them in a slideshow during the general sessions. So...show your NCASFAA pride and share away! [#WeAreNCASFAA](#)

Activities

Tuesday:

- Charity B-I-N-G-O 8:00-9:30 pm
 - Cards will be \$5 each or 3 for \$10 and all proceeds will go to the conference charity, The National Alliance on Mental Health of North Carolina
- Nominations and Elections/Volunteer Information
 - Please stop by the Registration area to find out about volunteer opportunities within NCASFAA, and how you can nominate a colleague to be the next NCASFAA officer.

Running Routes

Daniel Sanchez from UNC-Wilmington has shared two great running routes for those of you who may be interested! Please see the next page for the routes.

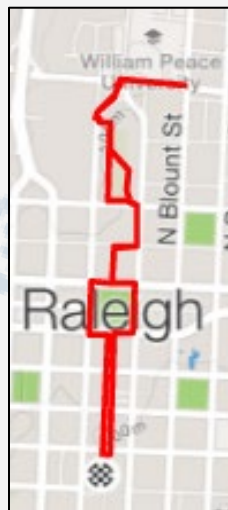
Run NCASFAA!

Downtown Raleigh is a great place to get out and enjoy a morning run, ahead of a full day of informative sessions. Below are two out-and-back running routes from the Sheraton Raleigh Hotel to explore, courtesy of Dan Sanchez (UNC Wilmington).

Please exercise caution, follow all traffic laws, and run safely.

NCASFAA 2019 Raleigh Run – North (2.66 miles)

<https://www.strava.com/routes/22220298>



NCASFAA 2019 Raleigh Run – South (3.4 miles)

<https://www.strava.com/routes/22219929>





nami

North Carolina

National Alliance on Mental Illness

NAMI NC Helpline: 800-451-9682 | Text: 919-999-6527

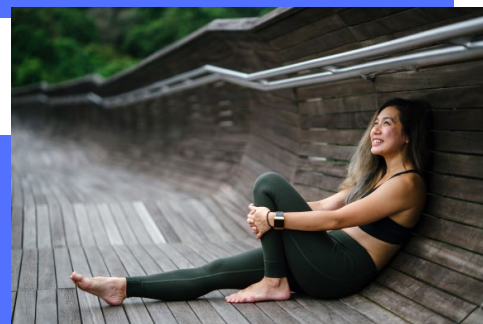


WHO WE ARE

For 35 years, NAMI North Carolina has worked with dedicated community volunteer leaders to raise awareness and provide essential education, advocacy, and support so people affected by mental illness can build better lives.

OUR VISION

In our envisioned future mental illness will no longer thwart a person's fulfillment of his or her potential. With early pinpoint diagnoses, interventions, and targeted medications and services there is no pervasive disability. ultimately we envision a day when prevention or a cure is found.



OUR APPROACH

Advocate at the county, state and national levels for non-discriminatory access to quality healthcare, housing, education and employment for people with mental illness. Educate the public about mental illness. Work to eliminate the stigma of mental illness. Advocate for increased funding for research into the causes and treatment of mental illness.

Through education, awareness, advocacy, and support, NAMI North Carolina represents the interests of all North Carolinians who are affected by mental health conditions, regardless of age, gender, race, ethnicity, religion, disability, language, sexual orientation, or gender identity.

Conference Agenda

Sunday November 3, 2019

	Conference Headquarters	Pin Oak
11:30-1:00 pm	Conference Registration	Mezzanine
1:00-5:00 pm	New Aid Officers' Workshop Presenter: Dr. Monty Hickman, Chair	Hannover I
1:00-5:00 pm	NASFAA University Credentials	Hannover II
	Cash Management Presenters: Dana Kelly, NASFAA	
1:00-5:00 pm	Professional Affiliate Set Up	Esplanade/Mezzanine
1:30-2:30 pm	Conference Committee Meeting Presenter: Amy Berrier, Conference Chair	Capital
2:30-3:00 pm	Break for—New Aid Officers, NASFAA U Participants, Executive Board and Conference Committee	Outside of Hannover I & II
3:00-5:00 pm	Executive Board Meeting Presenter: Robert Muhammad, NCASF AA President	Capital
6:30 pm	Dinner—By Invitation Only Presenters: Amy Berrier, Conference Chair Robert Muhammad, NCASF AA President	Suite 1629

Monday November 4, 2019

Conference Headquarters

Pin Oak

7:00-8:00 am	Continental Breakfast for—New Aid Officers, NASFAA U Participants, Executive Board, Director’s Roundtable, Conference Committee <i>Breads and bagels with condiments of peanut butter, fruit preserves, regular and flavored cream cheese, coffee, tea, juices, and water</i>	Outside Hannover I & II
7:30 am-12:00 pm	Conference Registration	Mezzanine
8:00-11:45 am	New Aid Officer Workshop, Day 2 Presenter: Dr. Monty Hickman, Chair	Hannover I
8:00-11:45 am	Directors’ Roundtable Presenter: Rachelle Feldman	Governor’s Ballroom
8:00-11:45 am	NASFAA University Credentials Consumer Information Presenter: Dana Kelly, NASFAA	Hannover II
8:00-10:00 am	Professional Affiliate Set Up	Esplanade/Mezzanine
10:00 am-12:00 pm	Charity Opens	Oak Forest Ballroom
10:00 am-12:00 pm	Professional Affiliates Open	Esplanade/Mezzanine

12:15-3:00 pm	Opening Luncheon Presentation of Colors—NC State University ROTC Musical Selections—St. Augustine’s University Chamber Singers Welcome by President Robert Muhammad Welcome by Dr. Peter Hans—NC Community College System President Dr. Garry Crites—National Alliance on Mental Illness, North Carolina (NAMI) Keynote Speaker-Lon Hodge and Gander Professional Affiliates’ Activity—Biz Daniel <i>Taste of Rome: Italian breads, Caprese Salad with cold spinach and orzo, Grilled chicken flank steak with a Romesco Sauce and Chicken Parmesan served with a seasonal vegetable Risotto, grilled Eggplant with Balsamic Reduction, Tiramisu and assorted Cannolis. Starbucks regular and decaffeinated coffee, Tazo teas</i>	Oak Forest Ballroom
3:00-5:00 pm	Charity Open	Oak Forest Ballroom
3:00-5:00 pm	Professional Affiliates’ Open	Esplanade/Mezzanine
3:15-4:00 pm	State of the State Address, Elizabeth McDuffie, NCSEAA	Oak Forest Ballroom
4:00-4:15 pm	Transition Break	
4:15:5:30 pm	Concurrent Sessions	
	Policies and Procedures; Your Key to Sound Operations and a Compliant Financial Aid Office! <i>Dana Kelly, presenter</i> Well-written policies and procedures allow employees to clearly understand their roles and responsibilities within predefined limits. Basically, policies and procedures allow management to guide operations without constant management intervention.... who wants a micro-manager? So, ask yourself... What conditions are my institution’s written policies and procedures in? Oh, you say you haven’t thought about that in a while... Or maybe you don’t have a written policies and procedures manual. Fear not, it’s never too late!	Capital
	Top Ten Compliance Findings <i>David Bartnicki, presenter</i> This session will explore the most current top ten audit and program review compliance findings among Title IV schools. We will discuss each finding, discovering the most common errors made within the various compliance issues and the potential risks that can lead to these findings. Is your school making any mistakes that would end up in a top ten count down? If unsure, then this session is for you!	Governor’s Ballroom
	Green Zone Training <i>Juliann Kasza & Daniel Hackley, presenters</i> Since the Post-9/11 GI Bill, additional opportunities for veterans to earn a college degree have resulted in a dramatic influx of veterans	Hannover I

on college campuses. The process of transitioning from the military to civilian life can pose challenges for all service members, veterans and their families. In order for advisors, faculty, staff and peers to better serve this population of students, we all need to be aware of the potential challenges a service member, student veteran and their families might face when attending college. Modeled on the 'Safe Zone' program, Green Zone is designed for faculty and staff to receive training about issues potentially facing active service members, student veterans and their families. Green Zone training will provide participants with the following:

- An understanding of the military experience.
- An understanding of the potential issues facing undergraduate and graduate student veterans as they transition from the military to our campus.
- An awareness of the resources available to student veterans and their families on and off our campus.

Treading Water: Financial Anxiety and Personal Stress on Campus *Dr. Garry Crites, presenter*

Hannover II

There is no doubt that college can be an exciting time for learning new ideas, exploring career options, and experiencing independence. But it can also be a very stressful time. Academic pressures, expectations, the challenges of new relationships, and the stress of mounting financial responsibilities can lead to anxiety, depression and a feeling of being out of control. For the 1 in 5 who suffer from a diagnosable mental illness, the stress of college can be even more difficult. This session is designed to help you, as a representative of your college or university, to understand what your students are experiencing, to recognize the warning signs of unhealthiness, and to know what resources are available to them.

Building Stronger Relationships with Administration and Faculty *Bruce Blackmon, presenter*

Hannover III

Do your bosses' eyes glaze over when you start explaining Year-Round Pell? Do you get blank stares from faculty when you explain that federal regulations won't allow them to do what they want to do? Does work have you frustrated? In this session, Bruce will pontificate on some strategies and practices that may help you build stronger relationships with your faculty and administration.

5:45-8:00 pm

New Members/First Time Attendees Event—by invitation only
Presenters: Kendra Simmons-Myers

Willow Oak

5:45-8:15 pm

Dinner on your own

Please make sure to save room and join us back at the Sheraton for the Professional Affiliates' Appreciation Event!

8:30-10:00 pm

Appreciation Event—Professional Affiliates

Oak Forest Ballroom

Cash Bar

Show your spirit! Wear your favorite NFL team jersey or your school attire! Be ready for some surprise entertainment!

Chef's cookie selection, double chocolate brownies, jumbo pretzels with mustard, miniature eclairs and cannolis, water and lemonade.

Tuesday, November 5, 2019

Conference Headquarters

Pin Oak

7:00 -8:00am

Breakfast

Esplanade/Mezzanine

Chef's Warm Breakfast Selection (breakfast sandwiches, one with meat and one without), assortment of baked goods, seasonal sliced fruit, assorted yogurts, granola, Starbucks coffee and hot teas

7:30 – 8:30am

Conference Registration

Mezzanine

7:30 am-12:00 pm

Charity Open

Oak Forest Ballroom

7:30 am-12:00 pm

Professional Affiliates' Open

Esplanade/Mezzanine

8:00 – 9:15am

Concurrent Sessions

Creating A Cost of Attendance *Sheila Burleson, presenter*

Capital

A general overview on the philosophy and construction of a Cost of Attendance.

Federal Q&A *David Bartnicki, presenter*

Governor's Ballroom

Have you ever wanted to ask a FED a question? Well now is your chance. This session is an open forum designed to address your burning TIV questions. So bring your questions and get ready for answers—whether you like them or not.

Understanding Satisfactory Academic Progress *Dameion Lovett & Celena Tulloss, presenters*

Hannover I

This session will provide information on how to effectively evaluate Satisfactory Academic Progress in compliance of federal regulations. Key SAP terms such as warning, probation, ineligible, calculation

period, pace, maximum time frame and academic plans will be discussed.

It Takes A Village—Integrating Financial Wellness Into Campus Programming, Adulting 101 Series *Sarita Broadway & Amanda Buchanan, presenters*

Hannover II

Every student needs to be financially fit, but we know that many lack the financial wellness education that they need. You would like to offer information to your students on campus, but where to start? What information should be offered and who should offer it? This session will provide you with more information about how to talk to your students on budgeting, overspending, over-borrowing, credit card debt, identity theft, and more. Ways to implement such a program on your campus will also be discussed.

Politicking 101—Advocating For Your Office *Rachelle Feldman, presenter*

Hannover III

This session will address the challenges of communicating the value, constraints and concerns of the financial aid office. An interactive session, where we will discuss approaches to getting a seat at the table, advocating for your office needs and other tips and tricks for negotiating campus politics.

9:30-10:15 am

Sector Caucuses

**Independent/Private Colleges and Universities
*Michelle Hemmer & Paul Coscia, presenters***

Capital

**Community Colleges
*Dr. Wanda White and Dr. Monty Hickman, presenters***

Governor's Ballroom

**Four Year Public Universities
*Jamie Pendergrass & Sherri Avent, presenters***

Hannover I

**Professional Affiliates
*Biz Daniel & Concepta Williamson***

Hannover II

Proprietary Institutions

Hannover III

10:15-10:30 am

Mid-Morning Break

Esplanade

*Assorted Granola Bars, Season's Harvest Whole Fruit, Starbucks Regular and Decaffeinated Coffee
Tazo teas, Assorted Cold Sodas, and Cold Bottled Water*

Clery Act *Major Ian Kendrick & Senior Officer Nate Hitchings, NCSU, presenters*

Capital

Come join representatives from the North Carolina State University Police Department provide an update on the Clery Act. You will receive a refresher on things you need to know such as geography, crime classifications, report writing, unfounding crimes, and timely warning and emergency notifications.

Modules & Title IV—Pell Recalculations *David Bartnicki, presenter*

Governor's Ballroom

This session will assume that attendees are knowledgeable about the basics of modules and their impact on federal student aid. This session will explore modules at a more advanced level, specifically the session will focus on Federal Pell Grant recalculations and how classes offered in modules can impact those recalculations. There will not be a discussion of Return of Title IV in a module environment in this session.

Reconciliation *Ben Carmichael & Michelle Hemmer, presenters*

Hannover I

This session will focus on reconciliation of the Title IV programs and Campus-Based programs. We will cover tips and tools to assist you with your routine reconciliation and end of year processing and closeout as well. You will learn the actions that your school needs to take in order for the monthly internal records to be consistent with FSA systems, as required by federal regulations.

Meeting the Needs of Military-Affiliated Students *Bradley Wrenn & Rachel Cavanaugh, presenters*

Hannover II

In several surveys of military-affiliated students around the nation, a primary concern that students consistently identified was a lack of understanding of how the VA education benefits are processed, and how they work in conjunction with traditional financial aid packages. This session is designed to provide you with a basic understanding of VA and GI Bill benefits and to answer specific questions you may have about how they might be used at your school. Our goal is to provide you the knowledge you need to ensure your students make the right decisions when using their VA benefits.

Back to the Future—Finish the FAFSA, a look into NC Trends and How to Increase FAFSA Completion Rates *Debra Slade & Dr. Marcia Weston, presenters*

Hannover III

This session will look at FAFSA completion trends in North Carolina and current implemented initiatives. Research studies on FAFSA completion in other states and nationally will be introduced. Participation is encouraged to share ideas and experiences with FAFSA completion rates.

12:00-1:45 pm

Tuesday Luncheon

Oak Forest Ballroom

Welcome by President Robert Muhammad

Retirement Recognitions

Remarks by Dameion Lovett, FAFSA President-Elect

Customer Service General Session, Dana Kelly, NASFAA

Traditional House Salad with Ranch and Balsamic Dressing

Red Bliss potato salad with sour cream and chives

Traditional Carolina Coleslaw

Buttermilk Fried Chicken

Beef Brisket

Country Style Green Beans

Freshly Baked Biscuits and Yeast Rolls

Chef's Choice of Pie, Cookies and Brownies, Sweet Iced Tea, Starbucks

Regular and Decaffeinated Coffee

1:45 pm

Charity Opens

Oak Forest Ballroom

1:45 pm

Professional Affiliates' Open

Esplanade/Mezzanine

2:00-3:15 pm

Concurrent Sessions

Student Accounts and Financial Aid Partnership *Michelle Hammer & Linda Paulhus, presenters*

Capital

Come join these presenters as they discuss their partnership at William Peace University. Share your ideas and let's learn from each other!

R2T4 Essential Concepts *David Bartnicki, presenter*

Governor's Ballroom

Whether you are new to R2T4 or have performed calculations for years, if you are interested in the R2T4 process, this session is for you. This presentation will discuss key definitions, provide a high level overview of the actual R2T4 steps, and address important concepts and time frames that take place throughout the R2T4 calculation—withdrawal dates, dates of determination, post-withdrawal disbursements, grant overpayments, etc. This session will also address some of the most popular R2T4 topics, including modules, institutional charges, aid that could have been disbursed, and more!

NC Community College System Financial Aid Leadership Academy *Drs. Wanda White and Joyce Valentine, presenters*

Hannover I

Effective leadership in the financial aid director position is critical to the stability of each college and university. Without proper leadership in the administration of federal, state and private aid funding, institutions would experience serious risks. This session will provide an overview of the NC Community College Financial Aid Leadership Academy and how it impacts the continuous and successful leadership of financial aid administrators. Presenters will share the purpose, components and importance of the Leadership Academy. Participants will gain an understanding of why it is vital for Financial Aid Administrators to prepare to become effective leaders on their campuses, as well as in the financial aid profession. Participants will learn how to develop a

succession plan and how it relates to ensuring their college has continuous exemplary leadership in the financial aid office.

Planning and Evaluating Programs and Initiatives *Dr. Kathryn Marker & Dr. Marcia Weston, presenters*

Hannover II

How do we know if the programs or initiatives we plan really work? To form an idea into an accomplishment takes planning that includes an evaluation process before implementation. Using an initiative, we all grapple with, FAFSA completion or FAFSA renewals, together we will create steps to plan, implement, and evaluate an initiative to reach our goals.

Working with Athletics, Band and Special Populations on Campus—What Works? Who Is Doing It Well? *Robert Muhammad & Kamesia House, presenters*

Hannover III

Special populations—the who's, why's, and funding challenges at your institutions. Discussing band, athletes, study abroad, military affiliated, and more! Who are they? What works? Who is doing it well? Why are these populations special (relevance, etc.)? Funding opportunities and challenges? Outreach opportunities? Practices? Timelines?

3:15-3:45 pm

Afternoon Refreshment Break

Esplanade/Mezzanine

*Individual Assorted Bags of Popcorn, Pretzels and Chips
Freshly Baked Brownies and Assorted Freshly Baked Cookies
Starbucks Regular & Decaffeinated Coffee and Tazo Teas and Assorted Cold Sodas and Bottled Water*

3:45 pm

Professional Affiliates Breakdown

Esplanade/Mezzanine

3:45-5:00 pm

Concurrent Sessions

Federal Work Study Panel *Mary Otto, Kendra Myers, & Cynthia Williams, panel members*

Capital

Join us for this interactive round table discussion about Federal Work Study. We will discuss best practices as well as current and evolving issues. Come learn new ideas and share what is working at your school.

Verification 2020-2021 *David Bartnicki, presenter*

Governor's Ballroom

This session will include a discussion of the verification requirements for the 2020-2021 *Free Application for Federal Student Aid* (FAFSA®) cycle and verification issues related to the 2020-2021 FAFSA cycle.

SEAA Higher Education Programs/Reviews *Kevin Lineberry & Cheryl Sauls, presenters*

Hannover I

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. In addition to program review

information, SEAA Higher Education staff will also be on hand to provide session attendees with updates pertaining to state aid programs.

Stopping Loan Repayment Scammers *Robert Muhammad & Michael O'Grady, presenters*

Hannover II

Companies scamming students about federal student loan repayment options has become pervasive. Although any student can change their repayment options for free, so called "debt relief" companies have been charging students anywhere from a couple hundred dollars to over a thousand dollars. These companies also falsify student and families' information with FSA. Come learn about how to identify the red flags that signify these predatory practices.

5:45-8:00 pm

Dinner on your own

If you are interested in getting to know other people and joining some old and new friends at dinner, join us for Tuesday Night Small Group Dining! You can sign up online (link provided below). At 5:45 pm, you will meet your group led by one or two Professional Affiliates' in the lobby and take a short walk to your restaurant. Dinner will be at your own expense.

<https://www.signupgenius.com/go/9040D4BA8AA29AB9-tuesday1>

5:30 pm

Charity Closes

Oak Forest Ballroom

Must pay and pick up items by 6 pm

8:00-9:30 pm

Charity B-I-N-G-O and Entertainment and Cash Bar
NCASFAA encourages you to come ready to purchase bingo cards and help us raise funds for our charity. There will be an opportunity to win some prizes!

Oak Forest Ballroom

Wednesday, November 6, 2019

Conference Headquarters

Pin Oak

7:30-8:30 am

Breakfast Buffet

Oak Forest Ballroom

*Beverage station with Starbucks Regular and Decaf Coffee, Tazo Hot Tea selection, and fresh juices. Ice water at the table.
Scrambled eggs, pancakes, and bacon*

*crispy breakfast potatoes
assorted cereals with 2% milk, assorted yogurts, assortment of
sliced fruit, including melons grapes and seasonal fruit
selected of breakfast breads, selection of bagels, spreads of peanut
butter, butter, fruit preserves, and regular and flavored cream
cheese*

8:30-11:30 am

Closing Session

Oak Forest Ballroom

*SASFAA Remarks, SASFAA President-Elect Celena Tulloss
Federal Update, David Bartnicki
Washington Update, Amy Berrier & Michael O'Grady
Spring 2020 Conference, Sherlock McDougald
Closing Remarks, President Robert Muhammad*

**Safe travels home! We look forward to seeing you
at the Spring 2020 Conference!**

**Embassy Suites-Wilmington Riverfront & Wilmington
Convention Center
Wilmington, NC
April 4-8, 2020**

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² Compared to Federal Direct Parent PLUS Loans disbursed on or after July 1, 2019.

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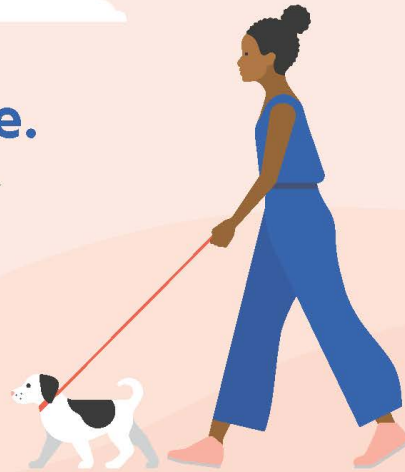
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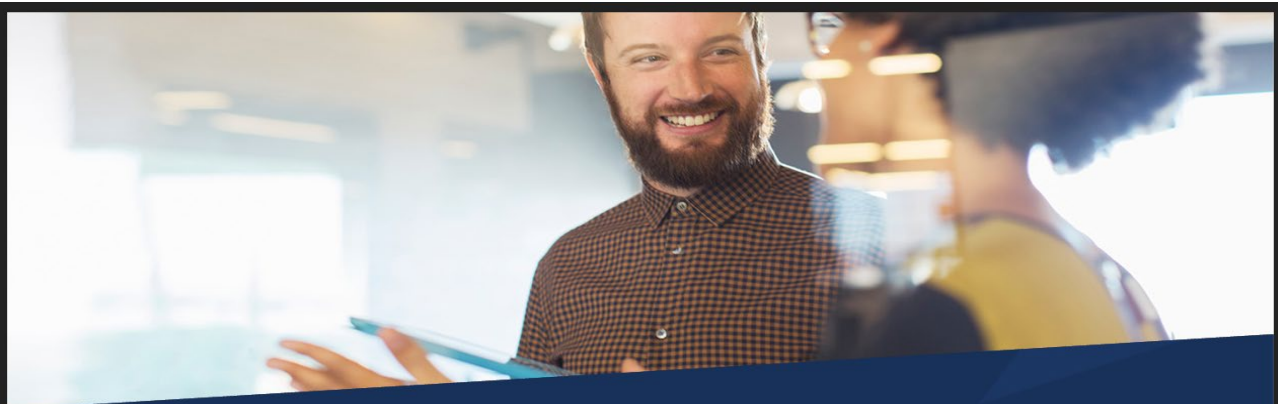
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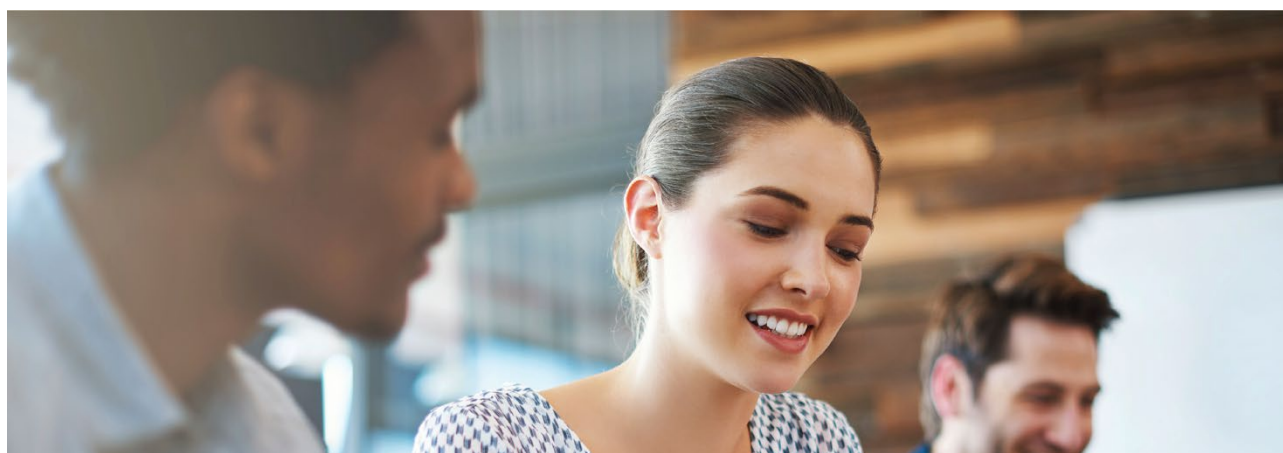
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YEAR	NAME	YEAR	NAME
2018	Rachel Cavanaugh		
2017	Lisa Koretoff	2016	Deborah "Tolly" Tollefson
2014	Lisanne Masterson	2012	Amy Berrier
2009	Kay Stroud	2006	JoAnn Carreras
2004	Rose Mary Stelma	2002	Janet Nowicki
2002	Bill Cox	2001	Barbara McQueen
1999	Betty Whalen	1999	Dan Klock
1998	Curtis Whalen	1997	Lawrence Allen
1995	Steve Brooks	1991	Stan Broadway
1990	Duffy L. Paul	1989	Eleanor Morris

NCASFAA Past Presidents

YEAR	NAME	YEAR	NAME
2018-19	Jamie Pendergrass		
2017-18	Jason Johnson	2016-17	Andrea Simpson
2015-16	Joey Trogdon	2014-15	Cathy Shell
2013-14	Rachel Cavanaugh	2012-13	Bridget Ellis
2011-12	Kim Driggers	2010-11	Paul Coscia
2009-10	Lisa Koretoff	2008-09	Amy Berrier
2007-08	Tony Carter	2006-07	Rance Jackson
2005-06	Dana Kelly	2004-05	Sharon Oliver
2003-04	Bruce Blackmon	2002-03	Rose Mary Stelma
2001-02	Wanda White	2000-01	Lisanne Masterson
1999-00	Janet Nowicki	1998-99	Larry Garrison
1997-98	Kay Stroud	1996-97	William Cox
1995-96	Dan Klock	1994-95	Sally Dodd
1993-94	Jane Kanipe	1992-93	Joe Capell
1991-92	Betty Whalen	1990-91	Ann McAnear
1989-90	Dolores Davis	1988-89	Eileen Dills
1987-88	Shirley Kool	1986-87	Mary Garren
1985-86	Steve Brooks	1984-85	Louise Nowicki
1983-84	Linda Yokeley	1982-83	Carl Malpass
1981-82	Jim Stanley	1980-81	Jim Belvin
1979-80	Clifton Collins	1978-79	Patsy Braxton
1977-78	Charles Holcombe	1976-77	Harold Nixon
1975-76	Gerald T. Bird	1974-75	William Mackie, Jr.
1973-74	Robert Boudreaux	1972-73	Eleanor Morris
1971-72	Lawrence Allen	1970-71	William M. Geer
1969-70	W.C. Blackwell		

2019-2020 Executive Board

NAME	POSITION	COLLEGE/FIRM
Robert Muhammed	President	Winston-Salem State University
Kamesia House	President-Elect	Fayetteville State University
Jamie Pendergrass	Past President	North Carolina State University
Kendra Myers	Vice President	Surry Community College
Zilma Lopes	Treasurer	Central Carolina Community
Dr. Sharon Oliver	Treasurer-Elect	North Carolina Central University
Nadine Ford	Secretary	Durham Technical Community College

2019-2020 Chairs

NAME	POSITION	COLLEGE/FIRM
Amy Berrier	Fall Conference	UNC Greensboro
Sherlock McDouglas	Spring Conference	Edgecombe Community College
Ben Carmichael	Budget and Finance	Winston-Salem State University
Kyle McMahan	Membership	North Carolina State University
Frank Parrilla	Diversity/Global Issues	North Carolina State University
Fred Holding	Diversity/Global Issues	UNC Wilmington
Bridget Ellis	Legislative Advisory	ECMC

2019-2020 Professional Advancement and Training

NAME	POSITION	COLLEGE/FIRM
Dr. Monty Hickman	New Aid Officers	North Carolina Community College System
Kali Brown	Intermediate Aid Officers	Vance Granville Community College
Michelle Hemmer	Training Webinars	William Peace University
Biz Daniel	Professional Affiliates	ScholarNet
Concepta Williamson	Professional Affiliates	Citizens Bank
Dan Sanchez	Publicity & Publications	UNC Wilmington
JD Gibbs	Technology Task Force	Lenoir Community College
Rodney Walton	Site Selection	PNC Bank
Marcia Weston	State & High School Relations	University of Mount Olive
Kevin Lineberry	State Agency Liaison	NCSEAA
Bruce Blackmon	Council of Past Presidents	UNC Charlotte
Sherri Avent	Minority Serving Institutions Conference	NC A&T State University
Dr. Wanda White	Analytics	NC Community College System
Mary Otto	Enrollment Management	Campbell University
Michael O'Grady	Fraud Taskforce	Financial Aid Services

Conference Committee

NAME	POSITION	COLLEGE/FIRM
Jennifer Archer	Financial Aid Technician	Catawba Valley Community College
Amy Berrier	Assistant Director for Operations	University of North Carolina-Greensboro
Gwendolyn Brown	Assistant Director of Financial Aid	Barton College
Amanda Buchanan	Assistant Director of Financial Aid	Western Carolina University
Paul Coscia	Assistant Vice President for Financial Aid	Salem College
Biz Daniel	Senior Marketing Associate	ScholarNet
Rachelle Feldman	Associate Provost and Director of Scholarships and Financial Aid	UNC-Chapel Hill
Jenelle Handcox	Director of Financial Aid	UNC-Pembroke
Michelle Hemmer	Director of Financial Aid	William Peace University
Dr. Monty Hickman	Associate Director, Student Success Support Services	NC Community College System
Katrina K Lee	Director of Financial Aid	University of Mount Olive
Zilma Lopes	Director of Financial Aid	Central Carolina Community College
Sherlock McDouglas	Director of Financial Aid	Edgecombe Community College
Crystal Morris	Director of Financial Aid	Davidson County Community College
Robert Muhammad	Director of Financial Aid	Winston-Salem State University
Kendra Myers	Financial Aid Technician	Surry Community College
Kasie Odham	Financial Aid Counselor	William Peace University
Michael O'Grady	Financial Aid Services	Financial Aid Services
Mary Otto	Director of Financial Aid	Campbell University
Dan Sanchez	Senior Financial Aid Counselor	University of North Carolina - Wilmington
Nicki Spang	Director of Business Development	Sallie Mae
Marcia Weston	Associate Director for Outreach	NCSEAA
Concepta Williamson	Vice President	Citizens Bank