



MAKING DREAMS COME TRUE

2023 FALL CONFERENCE



NOVEMBER 6-7

PRESIDENT CAVENAUGH

I am so excited for our fall virtual conference. I know that we are all anxious to hear of the exciting things coming down the pipeline in 2024-25. We can't wait, right?

The conference committee under the leadership of Past President Joey Trogon has done a wonderful job putting together a great conference with lots of great information for us. We will all come away with so much knowledge.

As of October 27 we have 177 registered with the deadline being October 30 so that number might go up. This is amazing.

I can't thank Joey and his committee enough for all the hard work putting together great informative sessions.

I have continued on with Past President Michelle Hemmer's charity, The Gilbert Scholarship. The Gilbert Scholarship. Rooted right here in North Carolina, The Gilbert Scholarship is a 501c3 tax exempt, non-profit, and helps students from foster care obtain a college degree. Most students have spent years in the system and have aged out. They have no outside support, no place to go for Thanksgiving or Christmas, and no mom or dad to text when life gets hard. Some even enter college without a car or a home. Eventually, the goal is to have one or more Gilbert Scholarships at all 58 community colleges in NC! Janee Knippenberg from PNC is doing her customary wonderful job with the charity. Please don't forget to support the charity.

I want to say a **HUGE THANK YOU** to our professional affiliates.

You are amazing and I don't know how we would do our conferences without your wonderful support

After we finish this wonderful virtual conference we will begin planning our spring face to face conference under the leadership of Tracy Rapp.

I can't wait to see everyone's beautiful face in lovely Wrightsville Beach in April. That conference will be April 8-10, 2024. Get your dancing shoes on!

Save your money and register early.

"Making Dreams Come True"

All the best

Rachel Cavenaugh
2023-24 NCASFAA President
2013-14 Past President



FROM YOUR CONFERENCE CHAIR



I am pleased to welcome you to the Fall 2023 Virtual Conference! The Fall Conference Committee has worked hard to provide you with opportunities for personal and professional growth. I strongly believe that you will find something very pertinent to attend each day of the conference.

You will receive excellent training on compliance issues, training from the North Carolina State Education Assistance Authority, valuable information about the FAFSA Simplification Act, and updates from knowledgeable officials from SEAA, SASFAA, and NASFAA. The conference has been intentionally planned to allow you to go back to your campus with information and ideas to offer your students and parents an improved customer experience, but to also give you the regulatory and process knowledge to be successful.

We hope that you enjoy the virtual conference and leave with the intention to help “Make Dreams Come True!”

Joey Trogdon

MONDAY, NOVEMBER 6TH

8:30-9:00 AM **Welcome, Gilbert Scholarship Presentation**

9:00- 9:45 AM **Purpose-Driven Leadership**

10:00-10:45 AM **Concurrent Sessions:**
-Top Common Findings and Updates
-Cybersecurity and Identity Theft
-Stress Management

11:00-11:45 AM **Concurrent Sessions:**
-Cohort default rates.... YES- it's still at thing
-The Next NC Scholarship Overview
-Serving Veterans on Your Campus

12:00-1:00 PM **Lunch Break**

1:00-1:45PM **Top 10 Issues in FAFSA Simplification
You May Have Missed**

2:00-3:00 PM **Sector Meetings**

3:00 -3:30 PM **Conference Housekeeping & Day 1 Closing**

TUESDAY, NOVEMBER 7TH

8:45-9:00 AM

Welcome & Conference Updates

9:00-9:45 AM

**North Carolina's Shifting
Demographic: Implications for
Serving a Diverse Student Population**

10:00-10:45 AM

State Update

11:00-11:45 AM

Concurrent Sessions:
-Making the Case for Financial Aid
Outreach Communications
-Top FAFSA Simplification Questions
-How One School Estimated the
Impact of the New FAFSA,
and How You Can Too

12:00-1:00 PM

Lunch Break

1:00-1:30 PM

SASFAA Update

1:45-2:45 PM

NASFAA Update

3:00-4:00 PM

Professional Judgment Best Practices

4:00-4:15 PM

Closing Session

KEYNOTE SPEAKER



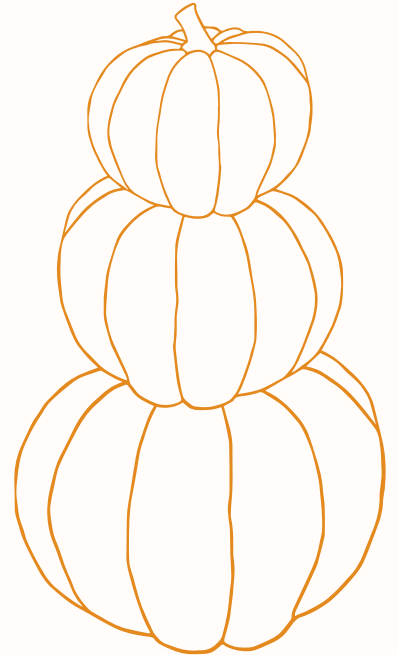
Dr. Robert Shackleford is a leadership consultant and executive coach that provides outstanding, relevant, dynamic leadership development training for business, education, church, community, and military organizations. Before starting the Shackleford Leadership Institute in July 2022, Dr. Shackleford had a successful career in higher education for 33 years that culminated in him serving as President of Randolph Community College for 15 years. Dr. Shackleford also served as a military chaplain in the US Army Reserves and NC Air National Guard where served as chaplain for two airplane crashes, ministered to wounded troops from Middle East wars evacuated to Germany, and ministered to and counseled with those affected by the 9-11 terrorist attack on the Pentagon. He has received many honors and awards, some of which include the Order of the Longleaf Pine Award, North Carolina Senate Leadership Award, NC Community College President of the Year, Randolph County Citizen of the Year, and Bluefield University Distinguished Hall of Graduates Award.



GENERAL SESSION SPEAKERS



GET TO KNOW OUR SPEAKERS



Andrea Poole is the fourth executive director of the North Carolina State Education Assistance Authority.

Ms. Poole has more than 20 years of service to the State of North Carolina, including more than a decade focused on higher education. Immediately prior to joining the Authority in January 2021, she served as Vice President for Strategic Initiatives at the North Carolina Community College System. Ms. Poole worked from 2013 to 2019 at the University of North Carolina System Office, first as the Associate Vice President of Finance and University Budgets and more recently as Secretary of the University.

From 2005 to 2013, Ms. Poole was a fiscal analyst in the North Carolina General Assembly's nonpartisan Fiscal Research Division. There, she specialized in issues surrounding higher education, financial aid, and health and human services. Ms. Poole began her career as a policy analyst for the North Carolina Housing Finance Agency. Ms. Poole earned a Bachelor of Science from Duke University and a Master of Public Administration from North Carolina State University.

GET TO KNOW OUR SPEAKERS



Brad Barnett is an Accredited Financial Counselor, Certified Personal Financial Manager, and Certified Financial Aid Administrator who works as the Associate Vice President for Access and Enrollment Management/Director of Financial Aid & Scholarships at James Madison University. Closing in on three decades of experience in the financial aid profession, Brad has been active in state, regional, and national financial aid associations as a presenter, committee member/chair, and elected officer. A past president of VASFAA and SASFAA, he has also served NASFAA on the Board of Directors, Financial Affairs Committee, as Treasurer, as Conference Chair, as a Standards of Excellence (SOE) Reviewer, and as a SOE Assessment Leader. This culminated with his service as the 2022-23 NASFAA National Chair.

Brad received the VAFSAA Excellence Award, VASFAA Life Membership Award, SASFAA Distinguished Service Award, NASFAA Regional Leadership Award, and NASFAA Allan W. Purdy Distinguished Service Award. In addition to these activities, he teaches personal finance courses (on-line and in person) at JMU and provides financial counseling services on a professional basis outside of his role with JMU.

Brad and his wife, Sara, have two sons. The oldest graduated from the University of Mary Washington and the youngest graduated from James Madison University. This has given him the unique perspective of going through the “college process” as a parent, as well as an administrator.

GET TO KNOW OUR SPEAKERS



Daniel T. Barkowitz is Assistant Vice President of Financial Aid and Student Employment at the University of Miami, a position he has held since July 2022. Daniel has served 35 years in institutions of higher education. Previous roles include: Assistant Vice President of Financial Aid and 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 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 is currently serving as President of SASFAA in 2023-24

GET TO KNOW OUR SPEAKERS



Dr. Nathan Dollar is the Director of Carolina Demography. His work helps leaders across North Carolina make sense of population-level changes throughout the state. Dollar, a population health demographer by training, has decades of experience in research and program implementation across North Carolina and abroad. Most recently Dollar served as a research scientist and Project Director for the Dynamics of Extreme Events, People, and Places (DEEPP) survey at the Carolina Population Center. There, he worked with an interdisciplinary team of researchers investigating the factors that shape how people and communities in eastern North Carolina, prepare for, are affected by, and recover from extreme weather events.

Dollar previously served in the U.S. Peace Corps in El Salvador and as Executive Director of Vecinos, Inc. Farmworker Health Program in western NC. Since 2014, he has served on the Governing Board for the NC Farmworker Health Program within the NC Office of Rural Health. Through these experiences, Dollar has gained a deep understanding of our state institutions and the complex issues shaping population changes in North Carolina.

A native of Wilson, Dollar received his BA in Sociology and Spanish from Western Carolina University, his MA in Sociology from Colorado State University and his PhD in Sociology from UNC-Chapel Hill.

GET TO KNOW OUR SPEAKERS



Dana Kelly currently serves as the vice president of professional development and institutional compliance for the National Association of Student Financial Aid Administrators (NASFAA). In this role she oversees all products and services assigned to the Training and Regulatory Assistance and Certification and Credentialing departments, supervises DC-based and remote training staff, manages the annual Leadership & Legislative Conference & Expo, develops session content for NASFAA's national conference and oversees NASFAA's Meetings area. As a member of NASFAA's executive team, she is instrumental in ensuring NASFAA is working toward the vision, mission, and goals established by NASFAA's Board of Directors. Dana has over 29 years experience working within the financial aid community. Prior to working at NASFAA, she held positions at Nelnet Diversified Solutions as a national trainer, at Nelnet as a regional director, and at High Point University as the director of student financial planning. She holds a bachelor's degree in justice and policy studies from Guilford College, a master's degree from University of Phoenix in organizational management, and master's in public administration from the University of North Carolina at Greensboro.

GET TO KNOW OUR SPEAKERS



Katie Conrad is the Sr. Associate Director of Financial Aid at Florida International University in Miami, Florida, a position she has held since August of 2016. Her previous positions include Director of Financial Aid at Midway University in Midway, Kentucky, and Associate Director of Student Financial Aid at Miami University in Oxford, Ohio. Katie holds a Bachelor of Arts Degree in Business Administration from Transylvania University, and a Master of Science Degree in Social and Philosophical Studies in Education from the University of Kentucky. She has earned the Certified Financial Aid Administrator designation (FAAC). Katie is currently the SASFAA Vice President for Training. During her 22 years in the Financial Aid profession, Katie has served in many leadership positions within her state and regional financial aid associations. She has a passion for education, life-long learning, and promotes educational access and success. Katie enjoys the warm Florida sunshine and scuba diving with her husband, Bill, and their 16-year-old daughter, Sam.

SESSION DESCRIPTIONS





Purpose-Driven Leadership

Presented by: Dr. Robert Shackelford

We all have different skills, interests, and abilities we apply to our work. But to keep us motivated, energized, and on-target, the “why” we do it may be the most important question of all! In this session, we will explore how purpose is the best fuel for sustainable dynamic leadership.

MON. 10:00-10:45

Top Common Findings & Updates

**Presented by: Charrise Dudley, NCSEAA and Chuck Dail, NC
Office of the State Auditor**

This session will be discussing recent NC Office of State Auditor audit findings along with other updates in student financial aid from a SEAA Program Reviewer.

Cybersecurity & Identity Theft

Presented by: Lisa Koretoff, Guilford Tech CC

Join us for this session where we discuss why cybersecurity and identity theft are everyone's responsibility. We will review the regulations, how they are enforced, developing compliant policies and procedures, and why any of these matter to those of us in the financial aid profession.

Stress Management

Presented by: Qadeerah Rasheed-Brown, Fayetteville Tech CC

Chronic stress triggers a range of physical and mental health symptoms. Physically, stress weakens the immune system and increases susceptibility to illness. Stress also exacerbates pain and reduces physical stamina and diminishes overall health. Finding time for self-care is important and necessary for workplace productivity. This interactive workshop will help emphasize the importance of selfcare. We will discuss and explore simple relaxation techniques to help you curb anxiety, release muscle tension, and eliminate stress.

MON. 11:00-11:45

Cohort Default Rates...Yes- It's still a thing

Presented by: Shannon Jones, Inceptia

Come learn what has changed and what you need to know before your students start calling you and asking what they need to do.....we have some free resources also!

The NC Next Scholarship Overview

Presented by: Traci Mitchell, CFI, Kathy Hastings, NCSEAA, Kevin Lineberry, NCSEAA

SEAA and CFI staff will present an overview of the North Carolina public sector consolidated state scholarship. 2024-2025 program parameters and eligibility will be discussed as well as the state-wide marketing campaign for the scholarship.

Serving Veterans on Your Campus

Presented by: Tiffany Ingram, Randolph CC & Rachel Cavanaugh, Cape Fear CC

This session will cover general information about the different types of veterans benefits service members, veterans, and their families can utilize for college. We will also dive into some of the most recent updates regarding veteran education benefits. We recommend this training to new veteran education certifying officials (SCOs) and people in the financial aid community that want to learn more about veterans education benefits.

MON. 1:00- 2:00

Top 10 Issues in FAFSA Simplification You May Have Missed

Presented by: Daniel Barkowitz, SASFAA and Katie Conrad, SASFAA

This session will address some of the complex issues resulting from the FAFSA Simplification Act. We are all familiar with the change from EFC to SAI, but what about the changes to asset reporting, child support received, determination of family size, provisional independent student, definition of single parent, changes to Pell Grant proration, and the endless reasons for students to submit a professional judgment in light of these changes? We will walk through these complexities and highlight some of the changes you might have missed from other presentations and offer suggestions for how to prepare for these challenges at your institution.

MON. 2:00-3:00

SECTOR MEETINGS:

2-Year Public Sector led by Amanda Buchanan, McDowell Technical CC

4-Year Public Sector led by Fred Holding, UNC - Wilmington

Independent Sector led by Derrick Everhart, Warren Wilson College

TUES. 9:00-9:45

**NC's Shifting Demographics:
Implications for Serving a Diverse
Student Population**

Presented by: Dr. Nathan Dollar, Carolina Demography

In this Session, Dr. Nathan Dollar will discuss the broad demographic patterns that have changed North Carolina's population over the last three decades and the implications for serving an increasingly diverse student population with disparate needs. In addition to demographic trends, the session will provide data on socioeconomic wellbeing, poverty, educational attainment, and opportunity youth.

TUES. 10:00-10:45

STATE UPDATE

Presented by: Andrea Poole

TUES. 11:00-11:45

Making the Case for Financial Aid Outreach Communications

**Karla Weber Wandel, University of Wisconsin- Madison & Kathy
Hastings NCSEAA**

NCSEAA recently conducted research on FAFSA completion that suggests confusion remains about financial aid, FAFSA and a student's ability to pay for college. For many, college can seem out of reach, even though two thirds of all jobs will require some form of education beyond high school by 2025. In this session we share FAFSA research findings as well as a model of financial aid communications from Wisconsin that can inform a more proactive approach to financial aid communications at your institution.

Top FAFSA Simplification Questions

Presented by: Dana Kelly, NASFAA

The biggest changes to the FAFSA in history will be implemented in the 2024-25 application cycle - are you ready? Explore the upcoming changes to the FAFSA, including direct data sharing with the IRS and a streamlined Federal Methodology, and learn more about the latest updates on implementation and NASFAA's Student Aid Index Modeling Tool. Discover what questions your colleagues are asking as we all prepare for the 2024-25 award year.

How One School Estimated the Impact of the New FAFSA, and How You Can Too

Presented by: Brad Barnett, NASFAA

The “go-live” date for significant changes to the Federal Methodology (FM) formula is rapidly approaching. When the 2024-25 FAFSA goes live the Student Aid Index (SAI) will replace the expected family contribution (EFC). Have you begun thinking about the impact the SAI will have on your packaging strategies, budgets, and other need-based aid programs? If not, it's time. In this session you'll see how James Madison University is using NASFAA's SAI Modeling Tool to estimate the financial impact this change will have, and to make an informed request to the institution's senior leadership for more funds to use for packaging in 2024-25.

TUES. 1:00-2:45

SASFAA Update

Presented by: Daniel Barkowitz

NASFAA Update:

Presented by: Brad Barnett

TUES. 3:00-4:00

Professional Judgment Best Practices

Presented by: Dana Kelly, NASFAA

Professional judgment (PJ) is sometimes viewed as one of the more challenging aspects of Title IV program administration. There are both explicit and implicit guidelines that must be followed in relation to other aspects of Title IV federal student aid administration. This session will explore guiding principles and best practices that can be applied on your campus.

**FALL
VIBES**





2023-2024

NCASFPA EXECUTIVE BOARD

President – Rachel Cavanaugh

Past-President Michelle Hemmer

President-Elect- Tiffany Youngblood

Vice-President – Lori Lewis

Secretary – Lee Bray

Treasurer- Tamara “Nikki” Glaspie

Treasurer-Elect Emily Jarrett

Budget & Finance – Sharon Oliver

Diversity/Global- Vacant

Legislative Advisory – Amy Berrier-Gerber

Membership – Karen King

Professional Advancement – Keats Ellis

(Intermediate Aid Officers)

Professional Advancement (Webinars) – Lisa Korteoff

Professional Affiliates – Janee Knippenberg

Program Committee Chair (Fall)-Joey Trogon

Program Committee Chair(Spring) – Tracy Rapp

Publicity and Publications – Madison Vance

Site Selection – Casey Wellen

State Agency Rep – Shawn Henderson

State & High School Relations – Kathy Hastings McDonald

Technology – Cedric Barksdale, Zilma Lopes, Michelle Hemmer

2 Year Public Sector-Amanda Buchanan

4 Year Public Rep – Fred Holding

Independent Rep – Derrick Everhart

Proprietary Rep - Vacant



THANK YOU TO THE FALL 2023 CONFERENCE COMMITTEE

Amanda Buchanan
Anita Elliott
Cecil Outlaw
Cedric Barksdale
Hannah Berthelson
Irwin Silver
Janee Knippenberg
Joey Trogon

Keats Ellis
Lisa Koretoff
Melissa McKean
Michelle Hemmer
Nikki Glaspie
Preston Dodson
Rachel Cavanaugh
Timothy Sampson
Vanessa Jernigan
Zilma Lopes




NCASFAA PAST PRESIDENTS

YEAR	NAME	YEAR	NAME
2022-23	Michelle Hemmer	2021-22	Zilma Lopes
2020-21	Kamesia House	2019-20	Robert Muhammad
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	Dr. 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



NCASFBA PAST PRESIDENTS

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 Holocmbe
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



ELEANOR S. MORRIS DISTINGUISHED SERVICE AWARD RECIPIENTS

1989 Eleanor Morris
1990 Duffy Paul
1991 Stan Broadway
1995 Steve Brooks
1997 Larry Allen
1998 Curtis Whalen
2002 Janet Sain
2002 Bill Cox
2003 Barbara McQueen

2004 Rose Mary Stelma
2006 Joanne Carreras
2009 Kay Stroud
2012 Amy Berrier
2014 Lisanne Masterson
2016 Tolly Tollefson
2017 Lisa Koretoff
2018 Rachel Cavenaugh
2019 Dr. Sharon Oliver
2022 Dr. Wanda White



AWARD OF MERIT RECIPIENTS


1995	Francine Reeves
1999	Betty Whalen
1999	Dan Klock
2002	Lisa Koretoff
2003	Dave Bartniki
2004	Elizabeth McDuffie

2006	Amy Berrier
2008	Bridget Ellis
2009	Jane Kanipe
2012	Robbie Schultz
2014	Anthony Jones
2016	Marcia Weston
2017	Melody Lawrence



NEW MEMBER AWARD RECIPIENTS

1998	Lisa Koretoff
1998	Ben Carey
2005	Cynthia Grant
2014	Jamie Pendergrass
2017	Mary Otto

A decorative border of autumn leaves in shades of yellow, orange, and brown, with some green leaves, framing the top and sides of the page.

STEVEN E. BROOKS PROFESSIONAL DEVELOPMENT SCHOLARSHIP RECIPIENTS

2015	Whitney McLaughlin
2016	Tyler Cook
2017	Elena Koutouzos
2022	Hannah Berthelson

The background features a stylized illustration of autumn foliage. Dark brown branches with small, oval-shaped leaves in shades of brown and tan are scattered across the upper and right portions of the image. The text is centered in the lower half.

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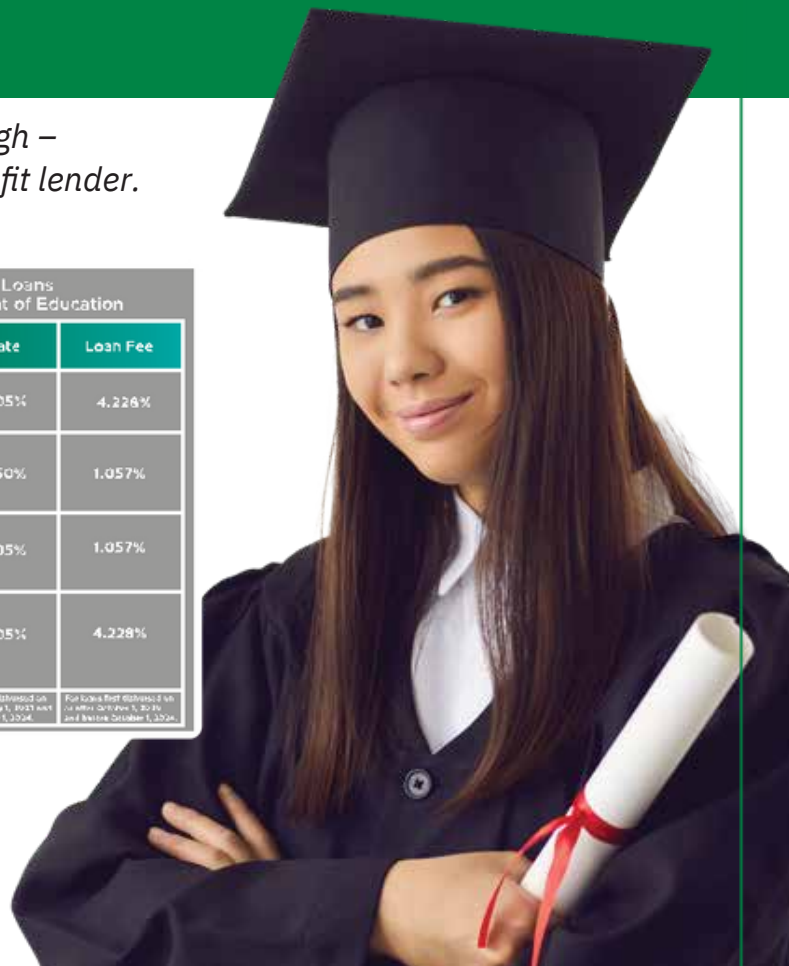
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Graduate or Professional Student	NC Student Assist	6.95%	\$0	Direct Unsubsidized	7.05%	1.057%
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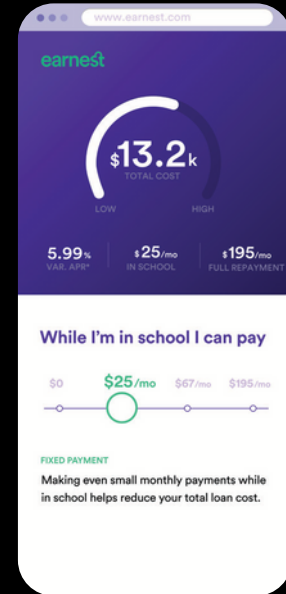
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