

NCASFAA

Fall 2024 Virtual Conference

November 6-7



**CLIMBING HIGHER TOGETHER:
RESILIENCE AND
STRENGTH IN UNITY**

Message from President Bray



Dear NCASFAA members,

I am delighted to welcome you to our conference themed “Climbing Higher Together: Resilience and Strength in Unity.” This past year has presented its challenges, yet here we are, united in our perseverance and commitment to our work.

I want to express my heartfelt gratitude for the compassion and support you have shown to those impacted by Hurricane Helene. Despite the devastation, it’s inspiring to witness how our community has come together in care and concern for one another. When I chose this theme of togetherness, resilience, and unity, I had no idea how fitting it would be given the struggles we’ve faced. My hope is that we can move beyond these difficulties and return to a sense of normalcy in both our personal lives and our careers.

I’m excited about the upcoming sessions and the engaging experiences we have planned for you. A special thanks to the conference committee, particularly chair Michelle Hemmer, for the immense effort that has gone into making this conference possible. Your hard work is truly appreciated and benefits us all. I also want to acknowledge our sponsors. Your unwavering support for our organization and the financial aid community means so much to us.

As we look ahead, we will continue to keep you informed about regulatory updates, provide webinars, training, and our in-person conference in the spring.

It’s a great honor to serve you as president for the 2024-2025 year, and I am eager to see what we can achieve together.

Wishing you all a fantastic conference!
Best,

Lee Bray
NCASFAA President, 2024-2025



Message from Conference Chair Michelle Hemmer

We survived 2023-24! While some of us feel like we barely made it happen, we survived the FAFSA craziness. Fall 2024 is here and I can't believe we are halfway through the semester. I am excited that you have decided to join us for the fall virtual conference for NCASFAA. The 2024 Fall Conference Committee has worked hard to prepare a wonderful virtual conference for you. We hope that the conference will provide the most up to date information there is available to help make your jobs easier. This year's theme, Climbing Higher Together: Resilience and Strength in Unity, is very fitting as we continue to navigate the 2025 FAFSA implementation and any other changes the Department of Education will throw our way. While this conference is virtual, we hope that you will use the chat feature to actively participate, catch up with your fellow colleagues and connect with new ones. Also, please be sure to take some time to connect with our Professional Affiliates who have joined us. We appreciate their support to NCASFAA.

We hope you enjoy this fabulous conference!

AGENDA



Wednesday, November 6th

8:30-9:00 AM

Welcome, Board Introductions,
& Charity Information

9:15-10:15 AM

Gainful Employment &
Financial Value Transparency

10:30-11:30 AM

Lunch Break

11:30-1:00 PM

Scaling New Heights: Navigating the
Cost of Attendance in Higher Education

1:00-2:00 PM

Conflicting Information

2:15-3:15 PM

Fun with R2T4's

3:20-4:20 PM

Sector Meetings

4:20 PM

Close out, Nomination information, &
Charity Information

AGENDA



Thursday, November 7th

8:30-9:00 AM

Welcome

9:00-10:00 AM

Federal Update

10:00-11:00 AM

State Update

11:15-11:45 AM

SASFAA Update

12:00-1:00 PM

**What's New in Administrative Capability:
Essential Updates for Financial Aid Administrators**

1:15-2:15 PM

2025 Beta FAFSA Testing

2:15 PM

**Nominations, Charity
Update, Conference Closing**



**GET TO KNOW
OUR SPEAKERS**

Dana Kelly



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 personnel, products and services assigned to the training and regulatory assistance team, certification, and credentialing team, and the Meeting & Corporate Partners team. Additionally, she manages the annual Leadership and Legislative Conference & Expo, manages content and logistics for NASFAA's national conference, and supports the logistics and content for the Executive Leadership Collective. 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. 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 of Science in justice and policy studies from Guilford College, a master's degree in organizational management from the University of Phoenix, and master's in public administration from the University of North Carolina at Greensboro.

Lisa Koretoff



Lisa Koretoff has been the Director of Financial Aid at Guilford Technical Community College in Jamestown since 1995. A native of California, she began her career in financial aid in 1987, first with a financial aid consulting firm and then as the Financial Aid Supervisor at the College of the Sequoias in Visalia, California, before moving to North Carolina. She is a graduate of California State University at Fresno.

In North Carolina, Lisa became active at the state and regional level where she has served on many committees and in leadership roles. As a member of NCASFAA, she has chaired several committees as well as serving as Vice-President and President. She has also served as a member and former chair of the Financial Aid Review Team for the North Carolina Community College System.

In 2023, her essay entitled “It's Not All About the Money: Strategic Enrollment Management for Under-resourced Institutions” was published in NASFAA’s latest book “Financial Aid Leadership in Strategic Enrollment Management.”

Rachel Cavenaugh



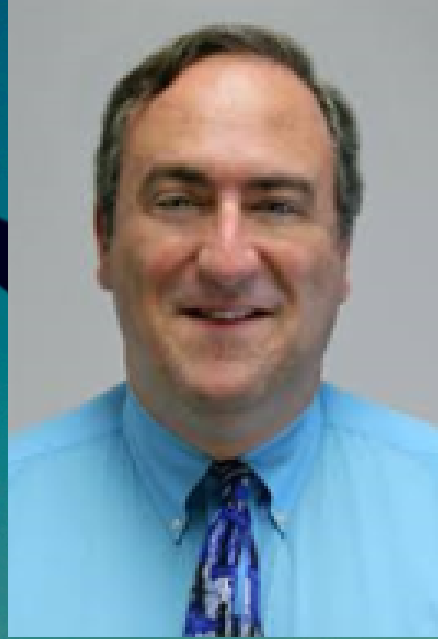
Rachel Cavenaugh is Senior Director of Financial Aid and Veterans Services at Cape Fear Community College in Wilmington, North Carolina. She has been employed at CFCC for 24 years. Before financial aid, she had 21 years of banking experience (always messing with someone's money). She has 1 husband, no children, and 1 nephew that is the apple of her eye. She loves helping students, especially veteran students. She will work as long as she can keep up with the 40-year-olds. She has held many positions with NCASFAA and NCACVA in the state of North Carolina. She is the 2023-24 Past President of NCASFAA, 2013-14 Past President of NCASFAA, and 2011-12 Past President of NCACVA. She loves to bowl and dance.

Melissa Baity



Melissa Baity graduated with a Bachelor of Science in Accounting from Elon College in 1995. She became a stay-at-home mom for a few years, then began working part-time once the kids were in school. She became a full-time accountant at Blue Cross and Blue Shield in 2006. In 2013, she began working in Financial Aid at Alamance Community College as a Perkins Financial Aid Counselor and fell in love with financial aid. Financial aid allowed her to use her accounting skills while letting her help people. The following year, she became the Financial Aid/VA Technician. In the Fall of 2017, she had to leave Alamance Community College due to health issues. After recovering, she began working part-time at Alamance Community College in May 2021. She transitioned into a full-time position again in October of the same year. She was hired as the Associate Director of Financial Aid at Vance-Granville Community College in January 2022 and became Director in June 2022.

Daniel Barkowitz



Daniel T. Barkowitz, FAAC®, has served 35 years in institutions of higher education. He is currently the Assistant Vice President of Student Financial Assistance and Employment at the University of Miami. Daniel has volunteered with NASFAA, SASFAA, EASFAA, FASFAA (Florida), and MASFAA (Massachusetts), including serving as the inaugural chair of the NASFAA's Commission of the Certified Financial Aid Administrator® (CFAA) Program, president of FASFAA, and current past-president of SASFAA. He served as the primary negotiator for financial aid administrators in the 2021 Federal Negotiated Rulemaking. Daniel is a recipient of FASFAA's Distinguished Service Award, MASFAA's Presidential Award, two-time recipient of FASFAA's President's Recognition Award, two-time recipient of MIT's Dean of Undergraduate Education Infinite Mile Award, and the recipient of Florida College Access Network's (FCAN) Top Influencer Award. Daniel earned his B.Sc. from Northeastern University, his M.Ed. from Boston University, and a certificate in Professional Fundraising from Boston University. He is a frequent conference presenter, published poet, musical theater actor, and Tarot card designer and collector. Daniel has two adult children and an adorable fur-baby.

Andrea Poole



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.

Dr. Sharon Oliver



Sharon has built a fulfilling career in financial aid for over thirty years and currently serves as the Associate Vice Chancellor for Enrollment Management at North Carolina Central University. With a deep understanding of the role that state and federal legislative policies play in supporting educational expenses, she remains an active leader in financial aid professional associations at the state, regional, and national levels. Sharon currently serves on the NCASFAA Board as the Budget and Finance Chair and on NASFAA's Board as Chair of the President Search Committee and Diversity Officer.

She finds immense gratification in her work, as it allows her to support families from diverse economic backgrounds and empower them to pursue their educational dreams. Sharon firmly believes that her efforts make a lasting difference in the lives of others and contribute positively to the broader community, fueling her passion for her profession.

As Eleanor Roosevelt once said, “The future belongs to those who believe in the beauty of their dreams.”

Leigh Ann Hussey



Leigh Ann Hussey is the Director of Financial Aid at the University of West Georgia and currently serves as SASFAA's President. She received both a Bachelor's in Secondary Education and a Master's in Student Affairs in Higher Education from Mississippi State University, and she has earned the NASFAA Certified Financial Aid Administrator (FAAC®) designation. She started her professional career in Housing and Residence Life before she began what she thought to be a short stint in Financial Aid. More than sixteen years later, she couldn't imagine herself in any other career! In her spare time, you can find Leigh Ann cheering on her Mississippi State Bulldogs, listening to great music, traveling, and spoiling all of the two and four legged children in her life.



SESSION DESCRIPTIONS

The background of the slide features a silhouette of two hikers on a mountain ridge. One hiker is on the left, leaning forward and reaching out with their right hand. The other hiker is on the right, also reaching out with their right hand towards the first hiker. They appear to be about to shake hands or high-five. The sky is a gradient of blue and orange, suggesting a sunset or sunrise. The overall tone is inspirational and collaborative.

Gainful Employment & Financial Value Transparency

Presented by:
Dana Kelly

This session will explore the latest federal Gainful Employment (GE) regulations and the emerging Low-Value Transparency framework, which aims to hold educational institutions accountable for student outcomes. Join us to learn how to navigate these changes and ensure your programs remain compliant while delivering value to students in an evolving regulatory landscape.

The background of the slide features a silhouette of two hikers on a mountain trail. One hiker is on the left, leaning forward and reaching out with their right hand. The other hiker is on the right, also reaching out with their right hand to meet the first hiker's hand. They are set against a bright, hazy sky with a gradient from light blue to orange, suggesting a sunrise or sunset. The overall tone is motivational and collaborative.

Scaling New Heights: Navigating the Cost of Attendance in Higher Education

Presented by:
Lisa Koretoff

Developing reasonable and compliant cost of attendance figures is one of the most complex duties in financial aid administration. Changes in regulations makes this even more challenging. We'll review the basics of cost of attendance construction as well as recent changes you need to keep in mind.

Resolving Conflicting Information

The background of the slide features a silhouette of two hikers on a mountain ridge. The hiker on the left is wearing a backpack and is reaching out with their right hand towards the hiker on the right. The hiker on the right is also wearing a backpack and is reaching out with their left hand towards the hiker on the left. They appear to be helping each other up or down the ridge. The sky in the background is a gradient of blue and orange, suggesting a sunset or sunrise.

Presented by:
Dana Kelly

Stay ahead of evolving regulations with this session on the latest developments in Administrative Capability requirements for financial aid offices. We'll cover new federal guidelines and expectations that impact compliance, operations, and oversight. Attendees will gain a clear understanding of the updated standards, including changes in reporting, internal controls, and institutional responsibilities.

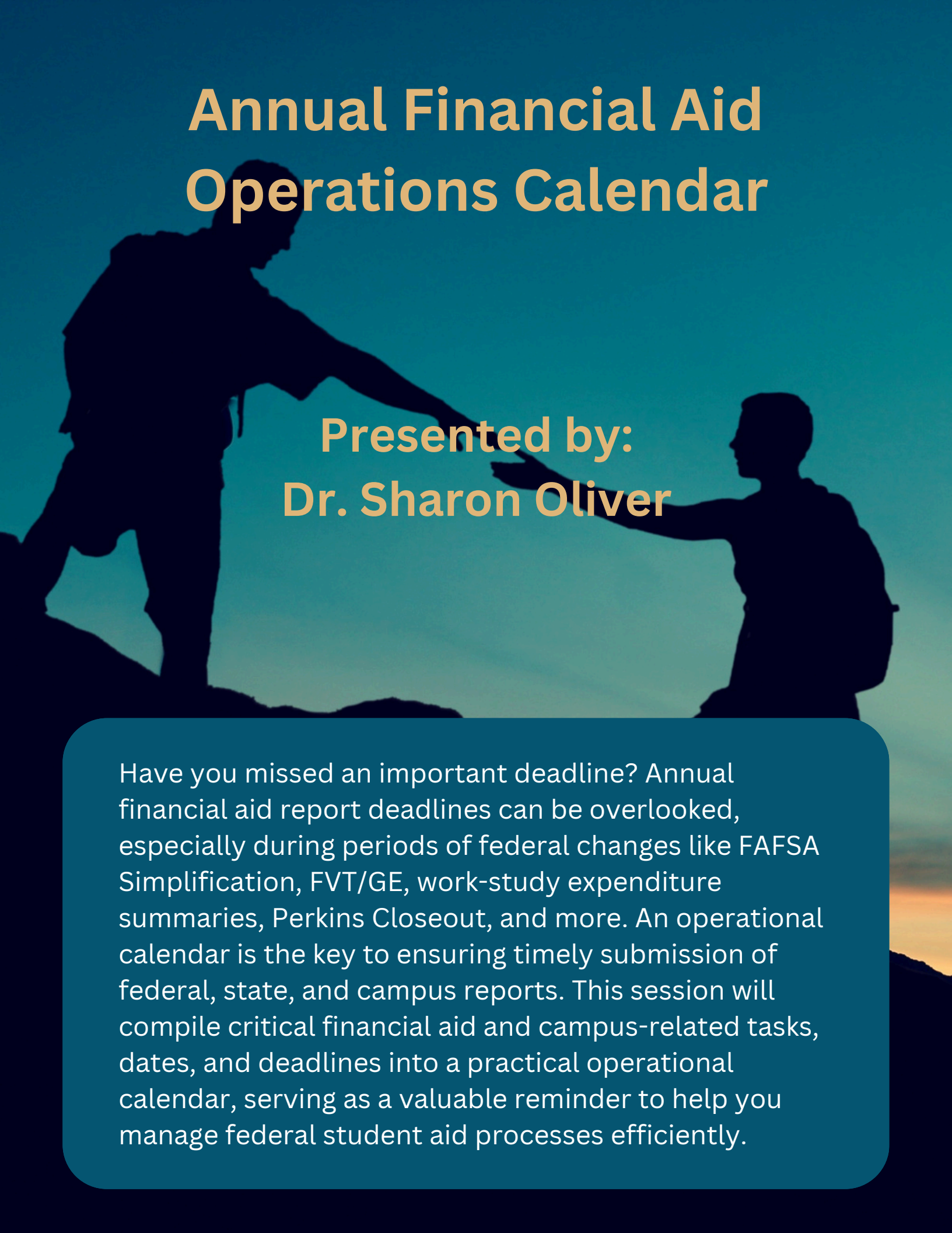
Federal Update

The background of the slide features a silhouette of two hikers on a mountain trail. One hiker is on the left, leaning forward and reaching out with their right hand. The other hiker is on the right, standing upright and reaching out with their left hand. They appear to be meeting or helping each other. The sky is a gradient of blue and orange, suggesting a sunset or sunrise. The overall tone is inspirational and supportive.

**Presented by:
Daniel Barkowitz**

Join us as we review the most recent information about all things Federal financial aid. Updates will include FAFSA, Beta FAFSA, and FAFSA Corrections, in addition to Gainful Employment/Financial Value Transparency and other topics.

Annual Financial Aid Operations Calendar

The background of the slide features a silhouette of two hikers. One hiker is on the left, leaning forward and reaching out with their right arm. The other hiker is on the right, standing upright and reaching out with their left arm. They appear to be reaching towards each other. The background is a gradient of blue and green, suggesting a sunset or sunrise over a landscape.

Presented by:
Dr. Sharon Oliver

Have you missed an important deadline? Annual financial aid report deadlines can be overlooked, especially during periods of federal changes like FAFSA Simplification, FVT/GE, work-study expenditure summaries, Perkins Closeout, and more. An operational calendar is the key to ensuring timely submission of federal, state, and campus reports. This session will compile critical financial aid and campus-related tasks, dates, and deadlines into a practical operational calendar, serving as a valuable reminder to help you manage federal student aid processes efficiently.

2024-25 Executive Board

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Fall 2024 Conference Committee

The background of the entire page features a silhouette of two hikers on a mountain ridge. The hiker on the left is in the foreground, leaning forward with a backpack. The hiker on the right is further back, also with a backpack, reaching out towards the center. The sky is a gradient of blue and orange, suggesting a sunset or sunrise.

Melissa Baity

Lee Bray

Amanda Buchanan

Rachel Cavanaugh

Nikki Glaspie

Michelle Hemmer

Shawn Henderson

Emily Jarrell

Crystal Johnson

Janee Knippenberg

Lori Lewis

Zilma Lopes

Stephen McLeon

Tracy Rapp

Jennifer Recendez

RaChele Summers

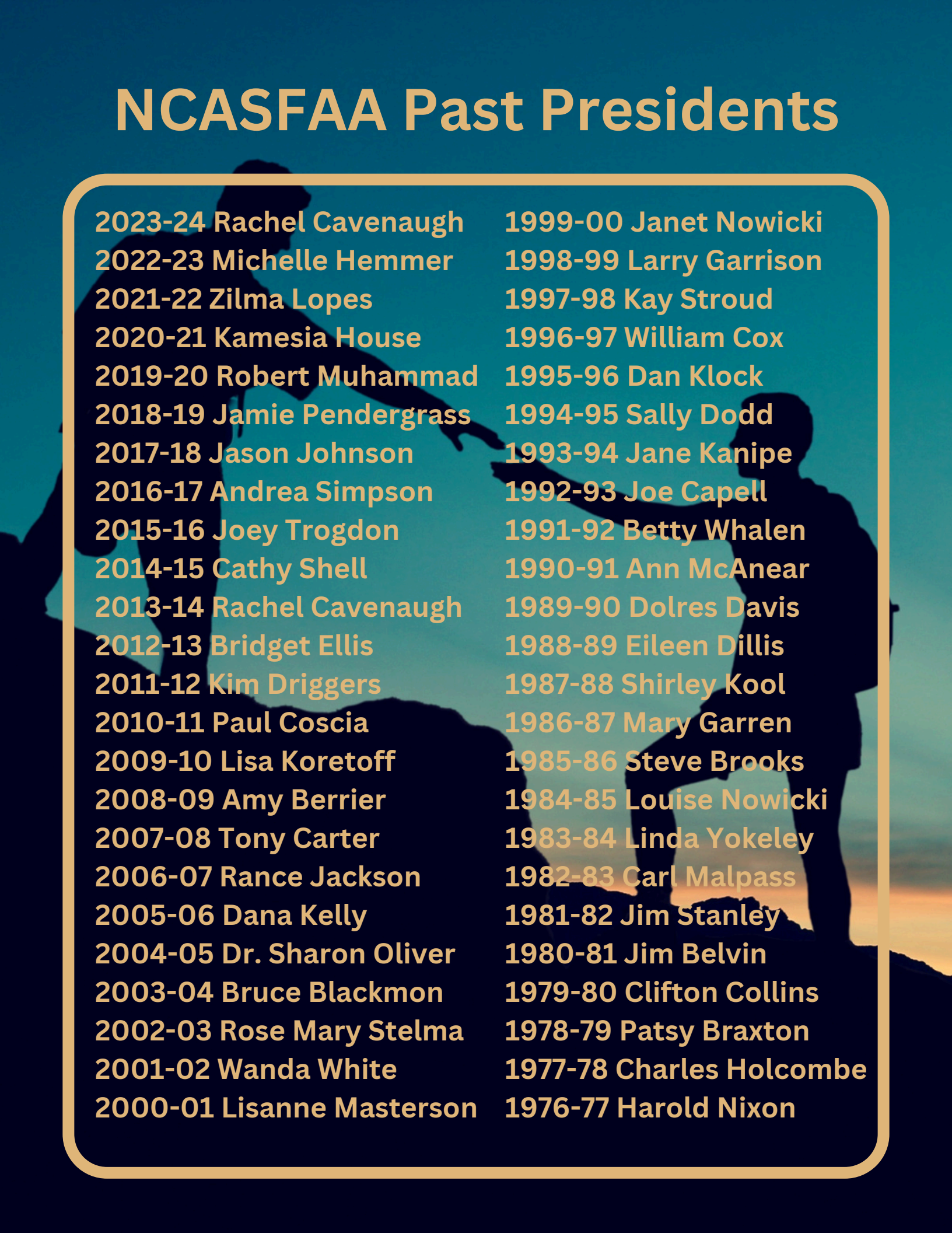
Sherry Underwood

Madison Vance

Casey Wallen

Audrey White

NCASFAA Past Presidents



2023-24 Rachel Cavenaugh	1999-00 Janet Nowicki
2022-23 Michelle Hemmer	1998-99 Larry Garrison
2021-22 Zilma Lopes	1997-98 Kay Stroud
2020-21 Kamesia House	1996-97 William Cox
2019-20 Robert Muhammad	1995-96 Dan Klock
2018-19 Jamie Pendergrass	1994-95 Sally Dodd
2017-18 Jason Johnson	1993-94 Jane Kanipe
2016-17 Andrea Simpson	1992-93 Joe Capell
2015-16 Joey Trogon	1991-92 Betty Whalen
2014-15 Cathy Shell	1990-91 Ann McAnear
2013-14 Rachel Cavenaugh	1989-90 Dolres Davis
2012-13 Bridget Ellis	1988-89 Eileen Dillis
2011-12 Kim Driggers	1987-88 Shirley Kool
2010-11 Paul Coscia	1986-87 Mary Garren
2009-10 Lisa Koretoff	1985-86 Steve Brooks
2008-09 Amy Berrier	1984-85 Louise Nowicki
2007-08 Tony Carter	1983-84 Linda Yokeley
2006-07 Rance Jackson	1982-83 Carl Malpass
2005-06 Dana Kelly	1981-82 Jim Stanley
2004-05 Dr. Sharon Oliver	1980-81 Jim Belvin
2003-04 Bruce Blackmon	1979-80 Clifton Collins
2002-03 Rose Mary Stelma	1978-79 Patsy Braxton
2001-02 Wanda White	1977-78 Charles Holcombe
2000-01 Lisanne Masterson	1976-77 Harold Nixon

NCASFAA Past Presidents

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

The background of the slide features a silhouette of two hikers on a mountain ridge. One hiker is on the left, leaning forward, and the other is on the right, standing upright. They are both wearing backpacks. The sky is a gradient of blue and orange, suggesting a sunset or sunrise.

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 Cavanaugh
2019 Dr. Sharon Oliver
2022 Dr. Wanda White

Award of Merit Recipients

The background of the slide features a silhouette of two hikers on a mountain peak. The hiker on the left is leaning forward, and the hiker on the right is standing upright, with their hands reaching towards each other in a gesture of support or achievement. The sky is a gradient of blue and orange, suggesting a sunset or sunrise.

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

2023 Cedric Barksdale

New Member Award Recipients



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

Steven E. Brooks Professional Development Scholarship Recipients

The background of the entire page is a photograph of two hikers silhouetted against a bright sunset sky. The hiker on the left is leaning forward, reaching out with their right hand towards the hiker on the right. The hiker on the right is standing upright, reaching out with their left hand towards the first hiker. They appear to be on a rocky mountain peak. The sky transitions from a deep blue at the top to a bright orange and yellow near the horizon.

2015 Whitney McLaughlin
2016 Tyler Cook
2017 Elena Koutouzos
2022 Hannah Golding
2023 Valerie Clem-Brown
2023 Chesea Gary
2024 Joseph Levister



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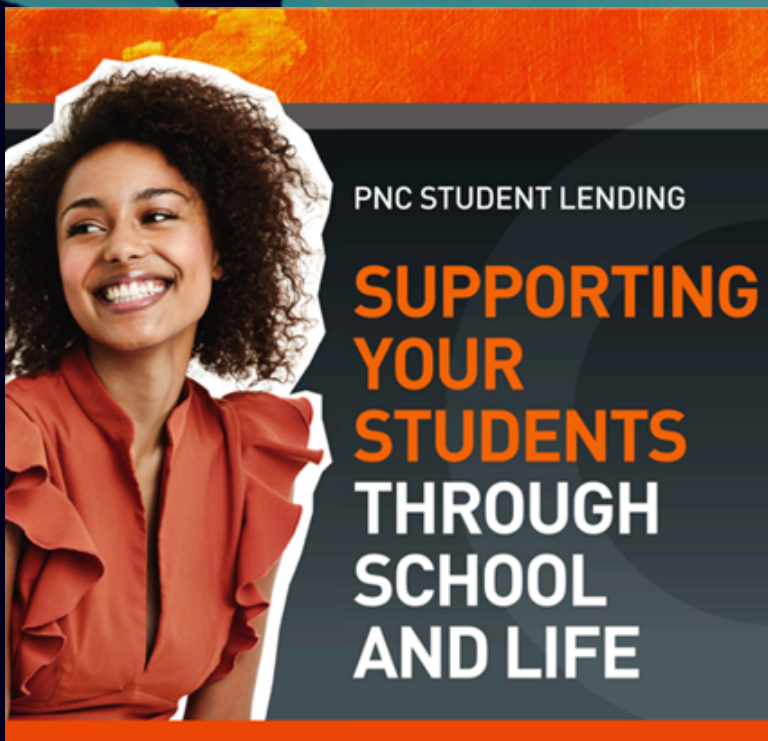
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