

Roadmap to Success

May 21-24, 2019

Hyatt Regency Coconut Point Resort and Spa

Session Tracks:



Executive



Financial Literacy/Default Management



Clock Hour



Grad/Professional



Technology



General Topic/Financial Aid Administrator









New Aid Officer



Diversity

Agenda At A Glance

Tuesday, May 21, 2019









| | | |
|---------------|--|---|
| 8:00a – 4:30p | Pre-conference, Registration & Voting Polls Open (closed during Lunch) | Great Egret BC |
| 8:00a – 3:00p | <i>Exhibit Area Set-up</i> | Calusa EFGH |
| 8:30a-11:30a | <p>NASFAA Credential Sessions:</p> <ul style="list-style-type: none">  Cash Management, <i>Dana Kelly</i>  Need Analysis, <i>Norma Robinson & Joan Bailey</i>  Professional Judgement, <i>Kylie Gross</i> | <p>Blue Heron A</p> <p>Blue Heron B</p> <p>Blue Heron C</p> |
| 11:45a-1:00p | Lunch – Included with <i>Pre-conference</i> Registrations | Estero C |
| 1:15p-4:15p | <p>NASFAA Credential Sessions:</p> <ul style="list-style-type: none">  Administrative Capability, <i>Dana Kelly</i>  Student Eligibility, <i>Lakisha Sanders</i>  R2T4, <i>Katie Conrad</i> | <p>Blue Heron A</p> <p>Blue Heron B</p> <p>Blue Heron C</p> |
| 4:30p-5:00p | Opening Session | Calusa ABCD |
| 5:00p-6:15p | General Session 1 | Calusa ABCD |

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|---------------|---------------------------------------|---------------------|
| | Federal Update, Dave Bartnicki | |
| 6:15p-6:45p | Moderator Orientation Session | Pine ABC |
| 6:30p – 8:30p | Reception & Family Night | Waterfall Pool Deck |












Wednesday, May 22, 2019

Region Color Day! Wear your Region colors.












I – Blue, II – Yellow, III – Green, IV – Red, V - Purple

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|---------------|--|---|
| 6:00a-7:00a | Happy Hoofers (meet in lobby) | |
| 7:30a-4:30p | Registration & Voting Polls Open (closed during Lunch) | Great Egret BC |
| 7:45a-8:30a | Morning Refreshments | Calusa EFGH |
| 8:00a-5:00p | Exhibit Area Open (closed for luncheon from 11:30a-1:00p) | Calusa EFGH |
| 8:30a-9:45a | Concurrent Sessions 1 | |
| |  Basics of Determining Academic Calendars (Standard, Non-standard and non-term), Dave Bartnicki – Georgene Diaz  Return to Title IV (R2T4) for Beginners, Katie Conrad – Jessica Herrera  Satisfactory Academic Progress (SAP), Dana Kelly – Norma Robinson  New Banner 9 Financial Aid Self Service, Robin Winston – Patricia Kerney  Student Loan Repayment: Where Are We Today, Where We Might Be Tomorrow, Geoff Stam - Sandy Shimp  How America Pays and Values College, Laura Dickerson, David Haygood –Kylie Gross | <p>Estero C</p> <p>Estero A</p> <p>Pine ABC</p> <p>Blue Heron ABC</p> <p>Sanibel B</p> <p>Sanibel A</p> |
| 9:45a-10:15a | Break | |
| 10:15a-11:15a | Concurrent Sessions 2 | |
| |  The View from the Corner Office: Lessons Learned from 124 Years in Financial Aid, Bill Spiers, Donna Kolb, Alicia Keaton, Billie-Jo Hamilton – Katie Conrad  Family Educational rights and Privacy Act (FERPA), Sandy Shimp –Teala Smith | <p>Estero A</p> <p>Sanibel A</p> |

We've given you some extra time throughout this agenda to spend with our Sponsors and Vendors during the conference.

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|---------------|---|---|
| |  Administering Adds, Drops and Withdrawals, Dave Bartnicki – Jill Sellers  Engaging Students with Technology: What Happens When Siri & Alexa Meet Financial Aid?, Dan Dreves, Max Shure – Kris Hatcher  Your GPS to Financial Literacy, Dameion Lovett - Sedrick Brinson  Top Ten Questions to NASFAA from Graduate/Professional Schools, Dana Kelly - Joan Bailey | <p>Estero C</p> <p>Sanibel B</p> <p>Pine ABC</p> <p>Blue Heron ABC</p> |
| 11:15a-11:30a | Transition Break | |
| 11:30a-1:00p | Opening Luncheon FASFAA Business Meeting/Elections | Calusa ABCD |
| 1:00p-1:15p | Transition Break | |
| 1:00p-5:00p | Exhibit Area Open | Calusa EFGH |
| 1:15p-2:15p | Concurrent Sessions 3 | |
| |  Working in an Enrollment Management Environment, Billie Jo Hamilton – Dameion Lovett  Verification, Elaine Brumback – Denise Asselta  Program Review Essentials and Top Ten Compliance Findings, Dave Bartnicki – Catherine Coker  The Mobile App and its Impact on Differing Demographics, Francisco Valines, Michael O’Grady, Chansone Durden –Trey Harrison  Current Topics in Approval & Administration of GI Bill® Education Benefits Betsy Wickham – Donna Kolb  Student Loan Repayment for Graduate Students, Fabiola Ortega – Patricia Kerney | <p>Estero A</p> <p>Pine ABC</p> <p>Estero C</p> <p>Sanibel A</p> <p>Blue Heron ABC</p> <p>Sanibel B</p> |
| 2:30p-3:30p | Concurrent Sessions 4 | |
| |  Disasters & Financial Aid, Kris Hatcher – Nolan Simmons | Estero A |







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| |  How to Make Student Communications Stick, Jordan Nischan – Jill Sellers  Create Your Financial Aid Manual, Kathy Suarez – Jessica Herera  Banner 9 Algorithmic Budgeting using Ellucian Workflow, Robin Winston, Joe Harple – Lakisha Sanders  R2T4 for Clock Hours, Dave Bartnicki – Melissa Brady  Student Debt Letters, One Default is Too Many: Using Debt Letters to Empower Student Success, Amy Gerber – Jenny Cun | <p>Sanibel A</p> <p>Sanibel B</p> <p>Pine ABC</p> <p>Estero C</p> <p>Blue Heron ABC</p> |
| 3:30p-4:00p | Break | Calusa EFGH |
| 4:00p-5:00p | Concurrent Sessions 5 | |
| |  How to Ensure Compliance Without Sacrificing Customer Service and Enrollment, Eddie Viera – Suzanne Evans  Cash Management Regulations Overview, Dave Bartnicki - Kevin McGowan  Funding Florida’s Future: The Role of Financial Aid in Achieving Florida’s Degree Attainment Goal, Kimberly Lent – Alex Rivera  Building And Implementing Year-round Training for the Financial Aid Office, Kristina Chavers – Alicia Keaton  Building a Culture of Diverse Data Users Through Data Visualization, Resche Hines – Kamia Mwango  A Little Nudge Goes a Long Way: Helping Students Help Themselves, Shannon Cross – Denise Asselta | <p>Sanibel A</p> <p>Estero C</p> <p>Pine ABC</p> <p>Sanibel B</p> <p>Estero A</p> <p>Blue Herron ABC</p> |
| 5:15p-7:00p | Dinner on your own | |
| 7:00p-10:00p | BINGO & Game Night | Calusa ABCD |













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Thursday, May 23, 2019




School Spirit Day! Wear clothing that represents your school/company.

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| 6:00a-7:00a | Happy Hoofers | |
| 7:30a-3:00p | Registration & Voting Polls Open (closed during lunch) | Great Egret BC |
| 8:00a-8:30a | Morning Refreshments | Calusa EFGH |
| 8:30a-10:00a | <p>General Session 2</p> <p>NASFAA Updates, Karen McCarthy</p> <p>SASFAA Updates, Bill Spiers</p> <p>OSFA Updates, Pete Hernandez</p> | Calusa ABCD |
| 8:00a-3:00p | Exhibit Area Open (closed for luncheon from 11:45p-1:30p) | Calusa EFGH |
| 10:00a-10:30a | Break | Calusa EFGH |
| 10:30a-11:30a | Concurrent Sessions 6 | |
| | <p> Legs, Regs, and You, Karen McCarthy <i>Francisco Valines</i></p> <p> Helping Students Fund Their Roadmap to Success: Private Scholarships, Foundations and Financial Aid, Bill Hoffman, Earl Young, Malaina Mote, Sharon Bayata – <i>Daniel Barkowitz</i></p> <p> Mental Health Resources for Student Success and Retention, Whitney Strohmayr – <i>Barbara Dieter</i></p> <p> Intro to SQL, Kris Hatcher – <i>Trey Harrison</i></p> <p> SAP Clock Hour Schools, Dave Bartnicki – <i>Lorrie Allen</i></p> <p> Preventing “Debt Relief” Scam Companies from Hurting Your Students, Will Shaffner, Michael O’Grady – <i>Alex Rivera</i></p> | <p>Pine ABC</p> <p>Blue Heron ABC</p> <p>Sanibel AB</p> <p>Captiva A</p> <p>Estero A</p> <p>Captiva B</p> |
| 11:30a-11:45a | Transition Break | |
| 11:45a-1:30p | <p>Luncheon</p> <p>FASFAA Awards Luncheon</p> | Calusa ABCD |
| 1:30p-1:45p | Transition Break | |

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| 1:45p-2:45p | Concurrent Sessions 7 | |
| |  Sometimes We All Need a Whack on the Side of the Head, Daniel Barkowitz – Kris Hatcher | Pine ABC |
| |  The Florida FAFSA Challenge: Inside Florida’s Efforts to Boost Statewide FAFSA Completion Rates, Kathy McDonald – Barbara Dietter | Sanibel A |
| |  Overview of CampusNexus Student Financial Aid Automated Process, Ruben Garcia – Trey Harrison | Sanibel B |
| |  Leveraging Technology to Serve Students, Ray Nault, Somnath Chatterjee, Lakisha Sanders – Brenda Brown | Blue Heron ABC |
| |  Navigating Generational Differences, Kamia Mwango – Gabriela Vega | Captiva A |
| |  Destination Proration, USA – Trudy Bell – Robert Whiting | Captiva B |
| 2:45p-3:00p | Break | |
| 3:00p-4:00p | Concurrent Sessions 8 | |
| |  Driving Enrollment and Retention For High Achieving, Low Income Students, Lenny Akins – Gabriela Vega | Sanibel A |
| |  Understanding Cross-Cultural/Generational Conflict in Communications, Chanson Durden, Michael O’Grady – Kristina Chavez | Sanibel B |
| |  Hot Topics in HR for the Financial Aid Manager, Carla McKnight – Sedrick Brinson | Captiva A |
| |  Sharpen Your Pencils: Part One - A History of Need Analysis, Daniel Barkowitz – Angela Moore | Pine ABC |
| |  Working With Multiple Generations, Laura Dickerson, David Haygood – Sofia Torres | Captiva B |
| |  Clock Hour and Technical Schools – Roadmap to Success, Kim Phillips | Blue Herron ABC |
| 3:00p-4:00p | Exhibit Area Break-down | Calusa EFGH |

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| 4:15p- 5:15p | Concurrent Session 9 | |
| |  Sharpen Your Pencils: Park Two - A History of Need Analysis Applied (EFC hand calculation), Daniel Barkowitz – Angela Moore | Pine ABC |
| |  Best Practices for Setting Up and Collecting Financial Aid Documents with CampusNexus Student Information System, Ruben Garcia, - Heddy Tellez | Captiva A |
| | <ul style="list-style-type: none"> ➤ State Colleges – Roadmap to Success, Kris Hatcher ➤ Public - Roadmap to Success, Dameion Lovett ➤ Private - Roadmap to Success, Kylie Gross | Sanibel A Blue Heron ABC Sanibel B |
| |  Graduate & Professional - Roadmap to Success, Sandy Shimp | Captiva B |
| 5:30p-?? | Dinner & Sightseeing on Your Own | |

Friday, May 24, 2019

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|---------------|--|-------------|
| 7:00a-8:00a | Happy Hoofers | |
| 8:00a-9:00a | Breakfast | Calusa ABCD |
| 9:15a-11:30a | FASFAA Business Meeting (continued) General Session 3 – Congress and the Administration: Where is Federal Student Aid Policy Today? <i>Ron Gambill, Bill Spiers, Daniel Barkowitz</i> | Calusa ABCD |
| 11:30a-12:00p | Closing | |

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2018-2019 Charity:

Community Cooperative of Lee County

DON'T FORGET TO VOTE FOR THE 19-20 FASFAA CANDIDATES!

Session Tracks:



Executive



Financial Literacy/Default Management



Clock Hour



Grad/Professional



Technology



General Topic/Financial Aid Administrator



New Aid Officer



Diversity

2019 Annual Conference



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