

2022 VASFAA CONFERENCE

AGENDA WITH DESCRIPTIONS



Sunday April 10, 2022

9:00am – 10:00am	Seaside Foyer	New Aid Officer's Workshop Registration - Open
9:00am – 12:00pm	Sinatra	VASFAA Board Meeting
10:00am – 12:00pm	Calloway	New Aid Officer's Workshop Part 1
12:00pm – 12:45pm	Goodman	Lunch – New Aid Officers & VASFAA Board <u>First Landing Picnic</u> Salads (Green Wedges, Classic Potato Salad, Vegetable Bow Tie Pasta Salad) Artisan Burgers on Brioche Buns (Angus Beef, Turkey Burger, Beyond Burger) Toppings, Condiments, and Chips with Desserts of Watermelon Slices and Fudge Brownies
1:00pm – 3:00pm	Calloway	New Aid Officer Workshop Part 2
1:00pm – 3:00pm	Kaye	Director's Summit Meeting
2:00pm – 5:00pm	Seaside Foyer	Conference Registration Open
2:00pm – 5:00pm	Seaside Foyer	Development Partner Setup
4:00pm – 6:00pm	Salon A-D	Opening Session Welcome to VASFAA 2022! - President Beth Armstrong Opening Business Meeting IRS – FAFSA Marital Status Mismatches, Presenter: Robert Weinerman – Iron Bridges The IRS and Department of Education define marriage differently and use a different moment in time to define marital relationships. Financial aid officers may need to combine incomes from individual tax returns – or extract a single person's information from a joint tax return, as a result. This session will look at the guidance that the Department of Education has provided mismatches related to marital status, including how to combine incomes, how to separate incomes, and what information schools need to have on file to complete these processes correctly.
6:00pm – 8:00pm	Salon E/Seaside Terrace	President's Cocktail Reception – Hors D'Oeuvres & Cash Bar Passed Crab Cakes and Vegetable Spring Rolls, Chef's Salad Stand Action Station, French Fry Bar, Island Style Whole Roasted Jerk Chicken Carving Station, Beef Tenderloin Carving Station, and a Wholly Cannoli Bar

8:00pm – 10:00pm

Salon E

VASFAA Entertainment – Music Trivia!!!

Continue to enjoy the evening with friends and colleagues that you have not seen for the last two years! Share your stories and/or commiserate with the only people that can understand what you've been through, enjoy some fun, music, and laughter by playing Music Bingo!!!

Monday April 11, 2022

8:00am – 9:00am

Salon A-D

Coffee & Breakfast with our Development Partners

8:00am – 4:00pm

Seaside Foyer

Conference Registration Open

9:00am – 10:15am

Salon A-D

General Session – Students Entering into Repayment, Presenter: Will Schaffner, MOHELA

Moderator: Cecelia Dwyer, College Ave

You can't afford to miss this discussion on how you, your office, and your role on campus is more crucial now than ever in supporting students and graduates. We will discuss the current environment surrounding loan payment and repayment, as well as your critical role in this process. Join your colleagues to determine if you, your office/campus are prepared, to support our students and borrowers in maneuvering the payment of their Public and Private education loans.

9:00am – 12:00pm

Seaside Foyer

Development Partners Exhibits Open

10:30am – 11:30am

Goodman

Who Must File a Tax Return, Presenter: Robert Weinerman, Iron Bridges

Moderator: Brad Scaggs, Kennedy & Company

One of the most challenging aspects of verification is not verification at all – it's that in the process of verifying non-filers, especially students, we find many students or family members who should have filed tax returns. Are you confident that you can tell a nonfiler from a filer? Do you know what to tell a student (or a dependent student's parent) when they need to file a tax return before you can complete their aid application? This program will cover what you need to review when you receive a non-filer's statement of earnings, including a careful review of household employee income, gross income, net-earnings from self-employment, and the penalties people are assessed when they file their returns late.

Calloway

Student Loan Advocacy 2.0 - SCHEV's New Loan Education Course, Presenter: Scott Kemp, SCHEV

Moderator: Matt Nettleton, Inceptia

Last fall marked the launch of Virginia's first student loan tool (virginiastudentloanhelp.org). This online resource is designed to help future, current and former students understand the complexities of student loan borrowing and repayment, within the context of all aspects of how to finance college and life expenses.

Dorsey

Scaling Up Scholarship Mentoring, Presenters: Page Fetter, Virginia Tech Chad Sartini, Virginia Tech

Moderator: Kathleen Roebuck, Cognition Financial

This session will examine how one institution grew a scholarship mentoring program from 500 students to over 1600 students in two years. Scholarship mentoring is a student service designed to renew

scholarships, grow retention, improve graduation and keep college affordable. Standing in the gray area between advising and coaching, mentoring is a student success strategy. Mentees in this program are undergraduate students in financial need, underrepresented, underserved and/or first-generation students. Presenters will explain the collaboration of academic advising, enrollment management, and

Kaye

How to Engage Students Better than Tik Tok, Presenter: Tim Young, Earnest

Moderator: Kevin Holman, Campus Logic

With calls, emails, texts, letters, and tweets, you might wonder how students still miss your messages. Students are **overstimulated** and if you want your message to be heard, you have to think like a social media company. Here, you will find the tools you need to engage your students on their terms and make your message heard.

12:00pm – 1:00pm

Lunch & Learn Sessions – Grab Your Choice of Boxed Lunch & Head to one of these exciting sessions presented by our Development Partners

Goodman

Campus Logic: Engaging Gen Z with Clear Communications

Calloway

Ocelot: AI Student Engagement Through Smart Communications

Dorsey

ECMC: Preparing for the End: Avoiding CDR Disaster!

Kaye

Kennedy & Company: 1st Aid: A Net Price Calculator that is so Much More

1:30pm – 2:30pm

Salon A-D

General Session – FAFSA Simplification – Karen McCarthy, 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.

2:30pm – 4:00pm

Seaside Foyer

Development Partners Exhibits Open – VISIT OUR PARTNERS!

2:45pm – 3:45pm

Goodman

VASA Application Updates – Lee Andes, SCHEV

Calloway

Tips for Maintaining a Healthy Work-Life Balance, Presenter: Casey Miller, Ascent

Moderator: Scott Orris, ELM Resources

Do you feel as if you need a change in your life? At the workshop, you'll discover...

Why a work/life balance is important (especially nowadays!)

How our team manages a work/life balance.

Tips to maintain your physical, emotional and mental wellness.

Creating (good) and breaking (bad) habits.

Dorsey

Eliminating Bias in Financial Aid, Presenter: Loretta Jones, ECPI University

Moderator: Nanette White, Sallie Mae

We will be defining what a bias is, discussing where bias can be found in Financial Aid, how to address the bias in the office, and discussing solutions to eliminate it.

Kaye

**Life After HEERF Panel, Presenters: Beth Armstrong, Virginia Tech, Laurie Owens, VCCS
Jesse McMillan, VCU**

Moderator: Anne Traverso, Sofi

Panel discussion with 3 college representatives about HEERF spending and experiences. Opportunity for Q&A with audience.

4:00pm – 5:00pm

Salon A-D

General Session: Five Dysfunctions of a Team, Presenter: Patty Peterson, Citizens

Moderator: Dave Deibel, ECMC

The Five Dysfunctions of a Team session addresses common hurdles to building a cohesive team, describes how to know if you are on a dysfunctional team, and provides ways to begin the process of having a better team. Organizational politics, poor communication, lack of trust, and simply being human make having a strong team challenging. This session, based on the book, The Five Dysfunctions of a Team: A Leadership Fable by best-selling author Patrick Lencioni, will show you the simple, effective steps to take to develop a financial aid team that is both cohesive and effective.

6:00pm – 8:30pm

Hotel Lobby

VASFAA Dinner Groups – Meet Your Group in the Hotel Lobby

8:30pm – 10:00pm

Salon E

VASFAA Entertainment – Music Bingo / Cash Bar & Deserts

We're Back!!! And we are ready to have some fun with the ever-popular game of Music Bingo! You are guaranteed to have fun and lots of laughs!

Tuesday, April 12, 2022

7:30am – 8:00am

Salon A-D

Coffee & Breakfast with our Development Partners

7:30am – 2:00pm

Seaside Foyer

Conference Registration Open

8:00am – 12:00pm

Seaside Foyer

Development Partners Exhibits Open

8:00am – 9:00am

Goodman

4yr Public

Calloway

4yr Private

Dorsey

2yr Public

Kaye

Proprietary

Seaside Foyer

Development Partners



9:15am – 10:30am

Salon A-D

General Session – Adopting a Healthy Mental Health Campus Culture, Presenter: Dr. Kris Lee, Active Minds

Moderator: Paula Crow, ECMC

Active Minds is the nation's premier nonprofit organization supporting mental health awareness and education for young adults. Since 2009, Active Minds speakers have been providing engaging, encouraging, and safe mental health education that's tailored for students, young adults, educators, professional groups, and other audiences. Active Minds is opening up the conversation about mental health and creating lasting change in the way mental health is talked about, cared for, and valued in the United States.

10:45am – 11:45am

Goodman

Asset Related Conflicting Information, Presenter: Robert Weinerman, Iron Bridges

Moderator: Patty Peterson, Citizens

In its definition of "good practices" for identifying conflicting information, the Department of Education asks financial aid officers to compare an applicant's answers to the asset questions on the FAFSA to information that the school may have received on a tax return or tax return transcript. This session will cover the asset related information that can be derived from the tax return, including a look at interest, dividends, business income, rental income, and retirement income, and how these may be used to identify conflicting information on the FAFSA.

Calloway

FWS Round Table, Presenters: Brad Barnett – James Madison University Mindy Taliaferro – Virginia Tech

Moderator: Willy Carey, Global Financial

Dorsey

State Aid 101, Presenter: Shannon Martini, Reynolds Community College

Moderator: Tim O'Donnell, CMD Outsourcing

This fun and interactive session will provide attendees with an overview of state grants and eligibility requirements through a game show format. This session is designed for those who are new aid officers or new to Virginia and wish to know more about the eligibility requirements for Virginia undergraduate state aid programs.

Kaye

Leveraging Scholarships to Strategically Allocate Institutional Resources, Presenter: Brad Scaggs, Kennedy & Company

Moderator: Rick Gallagher, Ascent

Do you ever wish you had better data to guide your scholarship decisions? As former higher education administrators we did. That is why we built a tool that provides important insights to help decision-makers and informs your institution's enrollment strategy. In this session, we will discuss why understanding your admitted class's propensity to enroll is an important first step to help you meet your enrollment goals;



and how you can use your institutional scholarships in a way to ensure the most impact. We will talk about our differentiated approach to this work and the outcomes it provides.

12:00pm – 2:00pm

Salon A-D

Luncheon / Awards / SASFAA Update Bill Spiers, SASFAA Past President Big Resignation, Big Lebowski, or Big & Rich: Who Cares? VASFAA has career advice for 2022!
Presenter: Bill Ayers, College Ave
Moderator: Beth Armstrong, Virginia Tech

2:30pm – 3:30pm

Goodman

Financial Aid's Role in Enrollment Management, Presenter: Beth Armstrong, Virginia Tech
Moderator: Dennis Moy, Discover

There is no doubt that the administration of financial aid is our primary responsibility. However, the way you view your and your office's role within an Enrollment Management structure not only impacts your day-to-day activities but:

- Your role with your campus partners.
- How your office is viewed on campus; and,
- When you are included in decisions that directly impact your office.

It does not always take the financial aid office "moving a mountain" to make positive changes within an Enrollment Management framework. This session will discuss some of the processes that Virginia Tech has taken to ensure that Financial Aid plays a key role within Enrollment Management at the institution and how it has affected our office relationships across campus.

Calloway

Customer Service, Presenter: Melissa Franks, W&M
Moderator: Tim Jones, The NHHEAF Network

Dorsey

Dependency Overrides & Appeals, Presenters: Andrew Quinn, John Tyler Community College
Sherika Charity, Reynolds Community College
Moderator: Sean McGivney, KHEAA

Come with us into the world of dependency overrides and appeals! In this session we will discuss requirements for dependency overrides and appeals (SAP, Change of Income, COA) while looking at case studies to determine student eligibility. This session will include Interactive attendee participation!

Kaye

Financial Education and Issues of Student Inequity, Presenter: Matt Nettleton, Inceptia
Moderator: Tim Young, Earnest

3:00pm

Seaside Foyer

Development Partner Breakdown – Then Join the VASFAA Family Feud!

3:45pm – 4:30pm

Salon A-D

General Session – VASFAA Family Feud – Biz Daniel, ELM Resources Kevin Perry

5:00pm – 6:30pm

Hotel Lobby

VASFAA's 2nd 5K Run/Walk for Charity

Whether you like to run or just want to walk, it's NOT too late to join in the fun with a casual stroll along the Boardwalk in support of this year's charity – The Montgomery County Christmas Store!!!

6:30pm – 8:30pm

Island Lawn

VASFAA Tail Gate Party & Games & Music!

Hors D'Oeuvres / Taco Tostada Bar / Sliders / Chips

Cash Bar & Beverages

Wednesday, April 13, 2022

8:30am – 11:00am

Salon A-D

Breakfast Buffett / Closing Business Session

Scrambled Eggs Whites & Classic Scrambled Eggs Chives, Cheddar Cheese, Salsa, Peppers
Applewood Bacon and Turkey Sausage, Breakfast Potatoes, Fruit & Berries, Yogurt, Breakfast
Pastries, Juice, Coffee, and Hot Tea Variety

SCHEV Update, Presenter: Lee Andes, SCHEV

NASFAA Update, Presenter: Brad Barnett, James Madison University

Changing of the Guard – Passing the Gavel, Beth Armstrong, Virginia Tech

Joe Dobrota, The College of William & Mary

