



## DC-DE-MD ASFAA Conference Agenda 2022

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*Sunday, October 30, 2022*

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**7:30 AM – 12:00 PM**

**Executive Board Meeting and Lunch**

*Skipjack*

**8:00 AM – 1:00 PM**

**Exhibitor Set-Up**

*Chesapeake Ballroom*

**10:45 AM – 1:15 PM**

**Pre-Conference NASFAA Credential: Student Eligibility**

*Cutter*

**Presenter: Catherine Boscher-Murphy, Associate Director/Compliance Officer, Montclair State University, New Jersey**

This session will explore the student eligibility requirements for receipt of federal financial aid. It will help you demonstrate the ability to protect the integrity of the Title IV programs by ensuring—prior to awarding or disbursement of funds—that your school’s students meet all relevant student-related and program-related eligibility requirements.

The range of topics includes:

- General Concepts of Student Eligibility
- Criteria Checked Via the Application Process
- Criteria Checked and Monitored by the School
- Educational Coursework and Programs Affecting Student Eligibility and Changes in Eligibility

**12:00 PM – 5:00 PM**

**Registration Open**

*Chesapeake Ballroom Foyer*

**1:00 PM – 1:30 PM**

**Exhibitor Area Open**

*Chesapeake Ballroom*

**1:30 PM – 2:30 PM**

**Opening Session and Chesapeake-A-Boo Kickoff! Refreshments available!**

*Chesapeake Ballroom*

Moderators: Conference Co-Chairs - Kat Delgrosso, College Ave Student Loans and Patty Peterson, Citizens

**Presenter: Keia Brown, Associate Director of Scholarships, University of Maryland – College Park**

This session will highlight a first-generation college student's path to success, including founding her own successful non-profit as the National Director of Miss Collegiate USA Organization! And she happens to be a prior Tri-State Chair! We will also be doing a fun activity to kick off the 2022 Fall Tri-State Conference!

**2:30 PM – 2:45 PM**

**Break**

*Chesapeake Ballroom*

**2:30 PM – 5:00 PM**

**Exhibitor Area Open**

*Chesapeake Ballroom*

**2:45 PM – 3:30 PM**

**Concurrent Sessions**

**1. Loan Repayment**

*Skipjack*

Moderator: Darwin Morency, Sallie Mae

**Presenter: Fawn Leipold, Associate Director of Financial Aid, George Washington School of Medicine and Health Sciences**

This session will discuss various loan payment options, debt management initiatives, and working with loan servicers.

**2. Policies & Procedures – Where do I start?**

*Schooner*

Moderator: Beth McSweeney, PNC

**Presenter: Greg Rinderle, Director, McClintock & Associates, P.C.**

Rules, regulations, and guidelines! They are the foundation of every policy and procedures manual. How can you get yours started, continue to keep it updated, and use it as a training tool? Let us show you how to begin.

**3. Advocacy – Why it is important!**

*Cutter*

Moderator: Brad Scaggs, Kennedy & Company

**Presenters: Andrew Harvey, Director of Financial Aid, Garrett College and Meredith Schor, Director of Financial Aid, George Washington School of Medicine and Health Sciences**

As practitioners in the field of financial aid, we counsel hundreds of students each week receiving financial aid. It is important that we provide our perspective and feedback to our representatives, at all levels of government. By doing this, we provide our representatives with valuable information needed to make good choices in developing and implementing legislation. This session will provide methods you can use on your own, through your institution, and through Tri-State and NASFAA, to reach out to our legislators and to those charged with implementing legislation, even the Department of Education!

**3:30 PM – 3:45 PM**

**Break**

*Chesapeake Ballroom*

**3:45 PM – 4:30 PM**

**Concurrent Sessions**

**1. Consortium Agreements - Best Practices**

*Cutter*

Moderator: Kara Layfield, Salisbury University

**Presenter: Meredith Schor, Director of Financial Aid, GWU School of Medicine & Health Sciences**

Best practices and tips, and guidelines for Consortium Agreements

**2. Verification, PJ & Corrections – Authority/Use, Documenting, Cases**

*Skipjack*

Moderator: Michael Elliott, Salisbury University

**Presenter: Greg Rinderle, Director, McClintock & Associates, P.C.**

A component of the daily work of every financial aid administrator includes documenting and verifying excessive amounts of detailed information. Let us show you how to manage that workload with some best practices for viewing, processing, and reviewing the work.

**3. Withdrawal Symptoms (from R2T4!)**

*Schooner*

Moderator: Anne Traverso, SoFi

**Presenter: Douglas Wilson, Associate Director Financial Aid Compliance, Delaware State University**

Is your institution compliant with Return of Title IV Funds regulations? This session will include a brief (and we do mean brief) overview of established and recent R2T4 regulations, a discussion of common audit/review findings, and available resources for aid professionals.

**5:30 PM – 7:00 PM**

**President's Reception**

*Chesapeake Ballroom*

**7:00 PM – 9:00 PM**

**Entertainment—Trivia Contest with Prizes!**

*Chesapeake Ballroom*

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*Monday, October 31, 2022*

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**7:30 AM – 5:30 PM**

**Registration Open**

*Chesapeake Ballroom Foyer*

**7:30 AM – 8:30 AM**

**Breakfast**

*Chesapeake Ballroom*

**8:30 AM – 12:15 PM**

**Exhibitor Area Open**

*Chesapeake Ballroom*

**8:45 AM – 11:30 AM**

**NASFAA Credential: Packaging & Notification of Awards**

*Schooner*

**Presenter: Catherine Boscher-Murphy, Associate Director/Compliance Officer, Montclair State University, New Jersey**

This session will outline the guidelines schools follow to combine various types of Title IV and non-Title IV aid from federal, state, institutional, and private entities, to create award packages designed to help meet the financial need of college students. In addition, you will also understand the concept of over-awards, and how to prevent and resolve them. This session will help give you the ability to meet a student's financial need with funds from various sources, while ensuring equitable distribution of limited resources, maintaining compliance with program-specific requirements, and endeavoring to meet the mission, goals, and objectives of your school.

The range of topics includes:

- General Concepts of Packaging
- Packaging Guidelines
- Over-awards, Appeals, and Award Notifications

**8:45 AM – 9:30 AM**

**Concurrent Sessions**

**1. Setting Up and Maintaining a Campus Food Pantry**

*Skipjack*

Moderator: Pat Shoemaker, Anne Arundel Community College

**Presenter: Caitlin Silver-Negron, Basic Needs Coordinator, Office of Student Engagement, Anne Arundel Community College**

This session gives reasons that colleges are finding the need to have food pantries and other "non-teaching" services on their campuses; how to set up a food pantry; and steps to take to maintain it.

**2. Making Finance Fun: How to get students EXCITED about Money Management!**

*Clipper*

Moderator: Detra Hooper, Howard County Community College

**Presenter: Peter Bielagus, Wealth Educators International, LLC**

A recent Associated Press poll revealed money management issues are the #1 reason students drop out of college. With inflation on the rise, students and parents alike are asking The Big Question: Is College Worth It?

**9:30 AM – 9:45 AM**

**Break**

*Chesapeake Ballroom*

**9:45 AM – 10:30 AM**

**Concurrent Sessions**

**1. Multi-generational Workplace**

*Clipper*

Moderator: Scott Orris

**Presenter: Danette Burgess, Assistant Director of Financial Aid, American University**

The purpose of this session is to understand generational diversity and tools to help optimize what everyone brings to the table.

**2. Confidence, Conflicts, and Escalation: Oh My!**

*Skipjack*

Moderator: Susan Creager, Salisbury University

**Presenter: Julie Lawton, Manager, Business Development, Cognition Financial**

The pandemic has left us all feeling a little rattled. In this session we will have fun discussing ways to bring our Confidence Back! Additionally, we will learn strategies to deal with escalated issues and approach intense customer situations.

**3. The Student Experience: Strategies for Driving Student Engagement**

*Cutter*

Moderator: Meg Harcum, Salisbury University

**Presenters: Darwin Morency, Director of Relationship Management, Sallie Mae & Keri Neidig, Director, Assistant Region Head, Sallie Mae**

Delivering a positive student experience relies on understanding their service expectations. This session will focus on distancing yourself from previously held expectations and exercising empathy in your student services role. We will discuss strategies for increasing the engagement with the students you serve.

**10:30 AM – 10:45 AM**

**Refreshment Break**

*Chesapeake Ballroom*

**10:45 AM – 11:30 AM**

**General Session: Potential Threats Facing Institutions of Higher Education**

*Chesapeake Ballroom*

Moderator: Meredith Schor, GWU School of Medicine & Health Sciences

**Presenters: Nicole Dotson, Special Agent and Dave Schick, Special Agent, Office of Inspector General, U.S. Department of Education**

The U.S. Department of Education (ED), Office of Inspector General (OIG), Investigation Services will provide an overview of ED OIG and discuss sources of allegations, indicators of fraud, examples of Title IV schemes, best

practices to reduce risk of fraud, and how to contact ED OIG. There will be a brief question and answer session at the end.

### 11:30 AM – 12:15 PM

#### General Session: Dealing with Active Shooter Situations

*Chesapeake Ballroom*

Moderator: Pat Shoemaker, Anne Arundel Community College

**Presenters: Sean Kapfhamer, Chief of AACC Police and Janene Kerpelman, Sergeant, AACC Police Department**

The Chief and a Sergeant from the Anne Arundel Community College Police Force will do a presentation of actions that you could take, should take, and should NOT take, if there is an active shooter or other armed and dangerous person on your campus. *Please note: This session will include the showing of plastic gun-shaped items during the presentation. Please only attend this session if you are comfortable.*

### 12:15 PM – 1:30 PM

#### Lunch, Business Meeting, Awards, State and Regional Announcements, Charity Speaker

*Chesapeake Ballroom*

### 1:30 PM – 2:15 PM

#### Keynote/General Session: Getting Unstuck, Dealing with Burnout, and Rediscovering a Happier You!

*Chesapeake Ballroom*

Moderator: Meredith Schor, GWU School of Medicine & Health Sciences

**Presenter: Grace E. Henry, EdD, Assistant Dean for Diversity & Inclusion, George Washington School of Medicine & Health Sciences**

The COVID pandemic created a sustained period of uncertainty from which many of us have yet to emotionally recover. As well, many of our institutions made budgetary cuts that require us to do more with less causing our work environments to be pressure filled and unfulfilling. It is easy to get stuck in the rut of daily responsibilities and find very few moments of happiness. This interactive session will engage participants in discussion on how to break out of daily routines and will inspire you to reconnect to your inner purpose.

### 2:15 PM – 5:00 PM

#### Exhibitor Area Open

*Chesapeake Ballroom*

### 2:15 PM – 3:15 PM\*

#### \*FSA: Federal Update (Note: 1 hour session)

*Clipper*

Moderator: Mason White, Salisbury University

**Presenter: Cynthia Hammond, Training Manager, Federal Student Aid**

The U.S. Department of Education (ED) will present information and updates about Title IV activities and initiatives, including information about ED's regulatory efforts, major operational updates, and reminders.

### 2:30 PM – 3:15 PM

#### Concurrent Sessions

#### 1. Hosting a Successful and Engaging Virtual Meeting – Tips for the Novice and Pros Alike!

*Schooner*

Moderator: Ronnie Webb, Salisbury University

**Presenter: Beth McSweeney, AVP/Campus Relations Manager, PNC**

Virtual meetings are likely to be with us for a while. You know the basics; find good lighting, limit distractions, and wear pants. Join me (a novice) as we review some common best practices that are often overlooked, and some “out of the box” ideas to increase engagement and decrease virtual meeting fatigue.

**2. Changes in the Student Loan Space**

*Skipjack*

Moderator: Julie Lawton, Cognition

**Presenters:**

**Sean McEvoy, Assistant Commissioner – Policy and Consumer Services and Student Loan Ombudsman, State of Maryland**

**Tisa Silver-Canady, Founder and Director, Maryland Center for Collegiate Financial Wellness**

A discussion of changes in the student loan space and how financial aid administrators can navigate queries featuring Sean McEvoy and Dr. Tisa Silver Canady.

**3:15 PM – 3:30 PM**

**Refreshment Break**

*Chesapeake Ballroom*

**3:30 PM – 4:15 PM\***

**Concurrent Sessions**

**1. FSA: Consumer Information/FSA Assessments (\*Note: FSA session is 1 hour from 3:30 PM – 4:30 PM)**

*Clipper*

Moderator: Susan Erb, Hood College

**Presenter: Cynthia Hammond, Training Manager, Federal Student Aid**

*Note: This session will be followed by a Q & A Session from 4:30 PM – 5:00 PM*

Consumer information, what a behemoth! As a perennial “favorite” on the list of Top 10 program review findings, many schools have difficulty fully complying in this area. Are you one of them? Don’t you wish there were a convenient, organized way to methodically tackle this issue? One that could help you “win” the consumer information version of whack-a-mole that you’ve been playing? Look no further! This session will highlight the reporting requirements schools must meet for consumer information disclosures to the public and the Department. It will also demonstrate how to use the FSA Assessments tool to identify and correct areas of non-compliance, including helpful example scenarios. Don’t miss this informative session, your secret weapon for improving your consumer information compliance!

**2. Scholarships: Write from Your Heart**

*Schooner*

Moderator: Rick Gallagher, Ascent

**Presenter: Jen Volberding, Associate Director, Scholarships, University of Maryland – Baltimore Campus**

Scholarships - the elusive creature of the Financial Aid world. When students are applying for scholarships, there are websites and links, after links - without any response. Or no scholarships to be had. This session is to help financial administrators to guide students on how to write a successful essay, tips of fraud to be aware of, and ways to write an essay that paints a picture for the scholarship reviewers.

**4:15 PM – 4:30 PM**

**Break**

*Chesapeake Ballroom*

**4:30 PM – 5:15 PM\***

**Concurrent Sessions**

**1. FSA: Q & A (Note: 30-minute session from 4:30 PM – 5:00 PM)**

*Clipper*

Moderator: Susan Erb, Hood College

**Presenter: Cynthia Hammond, Training Manager, Federal Student Aid**

**2. Managing Up: Communication to Overcome Roadblocks**

*Schooner*

Moderator: Joseph Jovell, Nelnet Bank

**Presenter: Meredith Schor, Director of Financial Aid, George Washington School of Medicine and Health Sciences**

Communicating needs up the organizational chain: compliance and team needs. Sometimes we must be able to explain to non-financial aid people the needs of our offices. This round-table group discussion will make suggestions on helpful hints to move your ideas up the chain.

**3. Strategic Enrollment Management**

*Skipjack*

Moderator: Patty Peterson, Citizens

**Presenter: Robert Muhammad, Director of Financial Aid, Howard University**

Strategic enrollment management meets the institution's enrollment goals by crafting strategies and prioritizing resources through a comprehensive, innovative-oriented matrix that builds on the strengths of each department (e.g., admissions, financial aid, registrar, bursar, advising) and focuses on the needs of students. Strategic enrollment management must be goal-orientated, actionable, measurable, and aligned with institutional priorities. During the two years that COVID plagued higher education, many institutions struggled to adapt their modalities to meet the needs of students. Now that online usage for crucial services such as meetings and class are commonplace, it is important for enrollment management to strengthen their virtual presence to meet the needs of an evolving student body. This presentation will discuss proven strategies as well as strategies that must be modified in the post pandemic landscape.

**5:45 PM – 7:00 PM**

**Dinner**

*Chesapeake Ballroom*

**7:00 PM – 10:00 PM**

**Monster Mash: Costume Contest, DJ, Pumpkin Decorating (7-9 pm) and S'mores at the Fire Pit!**

*Chesapeake Ballroom and Outside the Ballroom (S'mores)*

*S'mores at the fire pit sponsored by College Ave Student Loans*

***We will have prizes for the best costumes and decorated pumpkins!***



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*Tuesday, November 1, 2022*

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**7:30 AM – 9:00 AM**

**Exhibitor Area Open**

*Chesapeake Ballroom*

**8:00 AM – 9:00 AM**

**Breakfast**

*Chesapeake Ballroom*

**9:00 AM – 9:30 AM**

**Concurrent Sessions—State Roundtable Sessions**

**1. Maryland Schools**

*Chesapeake Ballroom*

**Moderator: Pat Shoemaker, Anne Arundel Community College and Maryland President**

This time will allow colleges and universities from Maryland to talk and go over any common questions or concerns in your state.

**2. DC Schools**

*Clipper A*

**Moderator: Robert Muhammad, Howard University and DC President**

This time will allow colleges and universities from DC to talk and go over any common questions or concerns in your area.

**3. Delaware Schools**

*Clipper B*

**Moderator: Tonya Schaeffer, Delaware County Technical College and Delaware President**

This time will allow colleges and universities from Delaware to talk and go over any common questions or concerns in your state.

**9:30 AM – 10:30 AM**

**NASFAA: Inside the Beltway Update**

*Chesapeake Ballroom*

Moderator: Kat Delgrosso, College Ave Student Loans

**Presenter: Rachel Gentry, Director of Government Relations, NASFAA**

This NASFAA Federal Update will provide an overview of the latest happenings in Washington, including a high-level landscape of the current political climate in D.C. with a focus on federal financial aid policy and how it has impacted students and institutions in recent years. Overall trends in student aid will be discussed including recent legislative and regulatory activity, reauthorization proposals and predictions for how student aid funding will fare in future budget negotiations. Movement within the Department of Education concerning negotiated rulemaking and updates from Federal Student Aid (FSA) will also be discussed. The session will also provide an overview of NASFAA-led projects, services, and advocacy efforts. Lastly, while the COVID-19 pandemic is still in effect, updates related to funding or relief measures will also be covered.

**10:30 AM – 10:45 AM**

**Refreshment Break**

*Chesapeake Ballroom*

**10:45 AM – 11:45 AM**

**NASFAA: Coming in 2024-2025! The New FAFSA**

*Chesapeake Ballroom*

Moderator: Kat Delgrosso, College Ave Student Loans

**Presenter: Rachel Gentry, Director of Government Relations, 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.

**11:45 AM – 12:30 PM**

**Boxed Lunches to Go**

*Chesapeake Ballroom*

**11:45 AM – 1:00 PM**

**Exhibitor Area Breakdown**

*Chesapeake Ballroom*