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# FASFAA ANNUAL CONFERENCE



May 27, 2025 - May 30, 2025  
Orlando, Florida

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## President's Welcome

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I am thrilled to welcome you to the [FASFAA 2025 Conference](#) at the Hyatt Regency Grand Cypress in Orlando. This year, we are Galactic Guardians of a Whole New World, navigating new territories in financial aid with Care, Innovation, and Advocacy. This event will provide the opportunities we need to engage, learn, and collaborate with fellow professionals.

The Conference Committee has worked tirelessly to create a program full of insightful sessions and networking opportunities. Starting from the pre-conference workshops with NASFAA credential session, the Director's Summit, and the LEAP cohort's recap to engaging conference topics and professional development panels – there's something for everyone. Be sure to meet new people, exchange contacts, and make the most of your time at the event— in financial aid we're stronger as a community.

A huge thank you to our Business Partners for the various ways they continue to actively participate and collaborate within the association! You'll find them contributing to sessions, offering valuable expertise, and contributing holistically in areas that impact your day-to-day operations and strategic planning. Be sure to connect with them, not just in the exhibit area but throughout the conference, as they share insights that can benefit both your office and the students you serve.

We will also continue the tradition of supporting the Bonnie L. Pirkle Scholarship and this year's charity, [Opportunity Community Ability](#) (OCA). I invite each attendee to help raise funds for these amazing causes. Let's combine our efforts to make a real difference!

I look forward to seeing everyone in Orlando as we explore new territories in financial aid together. Let's make this another conference to remember!

*Mia Mwangi*

**2024-2025 FASFAA President**

# Conference Chair & Co Chair Message

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Dear FASFAA Colleagues & Friends,

## **What a time to be a guardian in financial aid, navigating an era of transformation and opportunity!**

The Conference Committee has diligently prepared for the [FASFAA 2025 Conference](#). In this 'whole new world' of financial aid, we are committed to 'guarding' the future of our profession with dedication and vigilance, while also prioritizing our mental and physical well-being.

We understand that many of us have been navigating changes and adjustments from our once-familiar 'world.' In this new financial aid landscape, we must not only adapt and learn but also act as guardians of the financial aid galaxy and its future.

We welcome you to join us and your colleagues at the Hyatt Regency Grand Cypress Resort in beautiful and welcoming Orlando, FL for FASFAA's 2025 Conference. Key dates to remember:

- **Directors Summit:** Tuesday May 27th, 2025
- **Preconference & Conference Sessions:** Tuesday, May 27 through Friday, May 30, 2025

This event promises to be an informative, fun-filled opportunity for networking and learning as we '**Guard Our Financial Aid Galaxy.**'

The conference committee has committed to creating an event that caters to all experience levels and backgrounds.

At FASFAA, our mission is to support financial aid professionals, agencies, and related associations across Florida while maintaining strong regional and national connections. As we continue to learn and safeguard the future of financial aid, your participation is invaluable.

We look forward to seeing you at the FASFAA 2025 Conference. For further information, please refer to the conference website. If you have any questions, please don't hesitate to reach out to Traci or Kristina directly. We're always here to assist!

Warmly,

Kristina Chavers, Conference Chair

Traci Spagnoli-Rego, Conference Co-chair

# Welcome letters

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OFFICE OF JIM GRAY  
CITY COMMISSIONER

March 25, 2025

Dear Esteemed Colleagues and Conference Attendees,

On behalf of the **Florida Association of Student Financial Aid Administrators (FASFAA)**, it is my great pleasure to welcome you to the **2025 Annual Conference**. This year's event promises to be an exciting and impactful gathering of professionals dedicated to supporting and enhancing student access to higher education through financial aid.

The FASFAA team has worked diligently to create an experience that is both enriching and inspiring. We encourage you to take full advantage of the sessions, resources, and interactions available throughout the event. Please also take time to enjoy the hospitality and beauty of our host location, as we come together to reflect on our shared mission of supporting the students of Florida.

Sincerely,

A handwritten signature in black ink that reads "Jim Gray".

Jim Gray  
Orlando City Commissioner, District 1  
400 South Orange Avenue  
Orlando, Florida 32801  
p. 407.246.2001

May 27, 2025



On behalf of the City of Orlando, welcome to our community for the Florida Association of Student Financial Aid Administrators Annual Training Conference. We're thrilled that this event is being held in our region.

I want to thank you and FASFAA for playing a key role in shaping the futures of students by providing them with essential resources and support to continue their education. Your commitment and compassion are incredibly impactful and worthy of recognition. Please know that our community values and appreciates you.

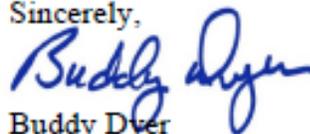
During your time here, I invite you to experience Orlando, which has so much to offer visitors. I am proud that our community is vibrant and inclusive.

You probably know about our world-class theme parks and attractions, where imagination becomes reality. But you may not be aware that Orlando is also filled with authentic experiences. This includes arts and cultural offerings, a diverse food scene, recreational amenities, sporting events and thriving small businesses that are located throughout the community.

There is something for everyone in Orlando, giving you endless possibilities to have fun and create unforgettable memories.

I hope that you find the conference rewarding and can also create opportunities to enjoy some of the many unique experiences that play a part in making Orlando unbelievably real.

Sincerely,



Buddy Dyer  
Mayor

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**OFFICE OF THE MAYOR**

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PO Box 4990 · Orlando, FL 32802-4990  
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ORANGE COUNTY MAYOR

**Jerry L. Demings**

P.O. BOX 1393, 201 SOUTH ROSALIND AVENUE, ORLANDO, FL 32802-1393  
PHONE: 407-836-7370 • FAX: 407-836-7360 • EMAIL: MAYOR@OCFL.NET



April 25, 2025

Greetings!

It is my sincere pleasure to welcome you to the Florida Association of Student Financial Aid Administrators (FASFAA) 2025 Conference!

I commend FASFAA for its work in providing aspiring students with financial aid to help them achieve their dreams. It is often said that education is the great equalizer. It's the bridge between dreams and reality, the path to empowerment, and the foundation for a better future. Studies indicate that students who receive financial aid are more likely to attend college and graduate. With organizations like FASFAA, you are investing in the future of our communities across the nation.

Orange County is proud to be one of the top destinations in the world for visitors. We are known for the finest hospitality, exciting theme parks, arts and cultural attractions, sports venues, and one of the largest convention centers in the nation. On behalf of the 1.5 million residents who call Orange County home, thank you for your dedication to providing financial aid to students.

Once again, welcome, and I wish you all the best for a successful conference!

Sincerely,

Jerry L. Demings  
Orange County Mayor

# GUEST SPEAKERS

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Thank you for your inspiring Contributions,

On behalf of the entire conference commitment, we extend our heartfelt gratitude for your invaluable contribution to Florida Association of Student Financial Aid Administration (FASFAA.). We truly appreciate you taking the time to share with us!

Warm regards,

Conference Committee



**M. Kristina Raatama**

MK Consulting | Managing Member, Attorney at Law  
*Director Summit Session & Conference General*

Kristina Raattama is the Managing Member of MK Consulting, bringing over 25 years of legal experience advising higher education institutions and non-profit organizations. She previously served as General Counsel at Florida International University and spent a decade as in-house counsel at the University of Florida. Through MK Consulting, she offers specialized legal and strategic support to colleges, foundations, and tax-exempt entities. Kristina currently serves on the Investment Subcommittee of the National Association of Colleges and Universities and as Vice Chair of Philanthropy Miami. She holds a J.D. with High Honors from the University of Florida and a B.A. in Economics from Vanderbilt University.



**Alicia Keaton**

University of Central Florida  
Interim Associate Vice President of Enrollment Planning  
and Management  
*Director Summit Session  
Conference General & Concurrent Sessions*

Alicia Keaton serves as the Interim Associate Vice President for Enrollment Planning and Management at the University of Central Florida, overseeing Undergraduate Admissions, Student Financial Assistance, and the Registrar's Office. With more than 30 years of experience in higher education, she leads a team of 120 staff members focused on enrollment growth, student access, and success. Under her leadership, UCF has surpassed FTIC enrollment goals while maintaining strong academic profiles. Alicia chairs UCF's Enrollment Management Committee, led the university's first Early Action Admission cycle, and holds national leadership roles with NASFAA and the College Board. She is a frequent speaker on topics related to financial aid, leadership, and enrollment strategy.



**Leigh Ann Hussey**

University of West Georgia  
SASFAA President

***SASFAA Update & Conference Concurrent Sessions***

Leigh Ann Hussey is the Assistant Vice President for Enrollment & Financial Aid at the University of West Georgia and is currently serving as the SASFAA President. A native of Mississippi, Leigh Ann held positions at both Itawamba Community College and Mississippi Gulf Coast Community College before venturing to Georgia for a total of 16 years of experience in the financial aid profession. In her free time, Leigh Ann enjoys live music, college sporting events, and spoiling her pets - Truvy Willadene the dog, and Carl Dean the cat.



**Helen Faith**

NASFAA Past Chair

University of Virginia, Associate Vice President for Enrollment and Student Financial Services

***NASFAA Spotlight Session***

Helen Faith, FAAC<sup>®</sup>, is the associate vice provost for enrollment and student financial services at the University of Virginia. She has 24 years of financial aid and higher education experience and has previously worked at the University of Wisconsin-Madison, Lane Community College, the University of Western States, Oregon Health & Science University, Portland State University, and the University of California, Santa Cruz. She earned her bachelor's degree in literature at UC Santa Cruz and a master's degree in education: policy, foundations, and administration at Portland State University, and has completed doctoral coursework in educational leadership and policy analysis at the University of Wisconsin-Madison. She has served in several elected and volunteer roles at the state, regional, and national levels, and is a past president of the Western Association of Student Financial Aid Administrators (WASFAA) and OASFAA (Oregon). She has served on NASFAA's Board of Directors as WASFAA regional representative and representative-at-large. She has also participated in negotiated rulemaking with the U.S. Department of Education and has collaborated with several higher education associations on financial aid research and analysis projects. Helen is passionate about financial aid and higher education as critical engines for social change with a focus on diversity, equity, and inclusion



**Heather Boutell**

Vanderbilt University School of Medicine  
Director of Financial Aid  
*Federal Update Session*

Heather Boutell, FAAC® is the Director of Financial Aid at Vanderbilt School of Medicine in Nashville, TN. Heather has worked in the field of financial aid for 33 years, spending the last 6 years as Director of Financial Aid at Vanderbilt School of Medicine. She previously worked as Director at Bellarmine University in Louisville, KY. Heather has been active in professional organizations and served as the President of the Kentucky Association of Student Aid Administrators in 2004-2005 and President of the Southern Association of Student Financial Aid Administrators in 2008-2009. She has served on the National Association of Student Financial Aid Administrators (NASFAA) Board of Directors several times in appointed and elected positions. She has received the KASFAA and SASFAA Distinguished Service Awards and recently was honored with the NASFAA Meritorious Achievement Award for her contributions to the profession. Heather earned her Bachelor of Music Education at Kentucky Wesleyan College and her Master of Education in College Student Personnel Services and College Counseling at the University of Louisville. In December, Heather earned her Ed.D. at Lipscomb University. Heather, her husband Steve, and her orange cat Crouton reside in Lebanon, TN. They have two adult sons who both live in Chicago.



**Sarah Baumhoff**

Kennesaw State University  
Director of Student Support  
*Conference Concurrent Sessions*

Sarah Baumhoff, FAAC® is the Director of Student Support, Office of Scholarships and Financial Aid at Kennesaw State University. Sarah has served in a variety of roles in both public and private institutions for the last 29 years in financial aid since her time as a work-study student while in college. After starting her involvement through the state association in Georgia in various roles including GASFAA President 2015-2016. She is currently serving as the GASFAA President Elect. She has served as a member of the Certified Financial Aid Administrator® Program Implementation Group, as a member of the NASFAA Leadership Development & Professional Advancement Committee, and is currently the SASFAA Budget and Finance Chair.

Sarah is passionate about helping students fund their education. Sarah is married to her husband, Ken, and has two boys, Adam and Andrew. Sarah holds a bachelor's degree in Marketing and Business Administration from Birmingham-Southern College and a master's degree in Higher Education Administration from Northern Illinois University.

# Hyatt Regency Grand Cypress Orlando, Florida

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## Hotel Information:

- ◆ Mandatory Hotel Fee of \$10.00 includes:
  - Unlimited local and in-state calls
  - Intra-property transportation
  - Unlimited use of the Health Club
  - 7-hole Pitch & Putt course
  - Golf driving range access
  - Basketball, volleyball, bicycles.
  - Hydro bikes, sail boats, paddle-boats, and canoes

## Onsite Dining Information:

- ◆ Lakehouse Sushi Bar
- ◆ Market
- ◆ The Lobby Bar
- ◆ Lakehouse Restaurant & Bar
- ◆ Four Flamingos, A Richard Blais Florida Kitchen
- ◆ On the Rocks Poolside Restaurant

For additional information regarding dining and entertainment click [here](#).  
[Dining Options](#)

## Parking:

There is a charge for both self and valet parking. The **self-parking rate has been discounted to \$10.00 per vehicle per day/night**, for both **guests staying on the property and daily guests**. The **overnight valet rate is \$52.00**, exclusive of applicable taxes.

# Conference Facility Layout

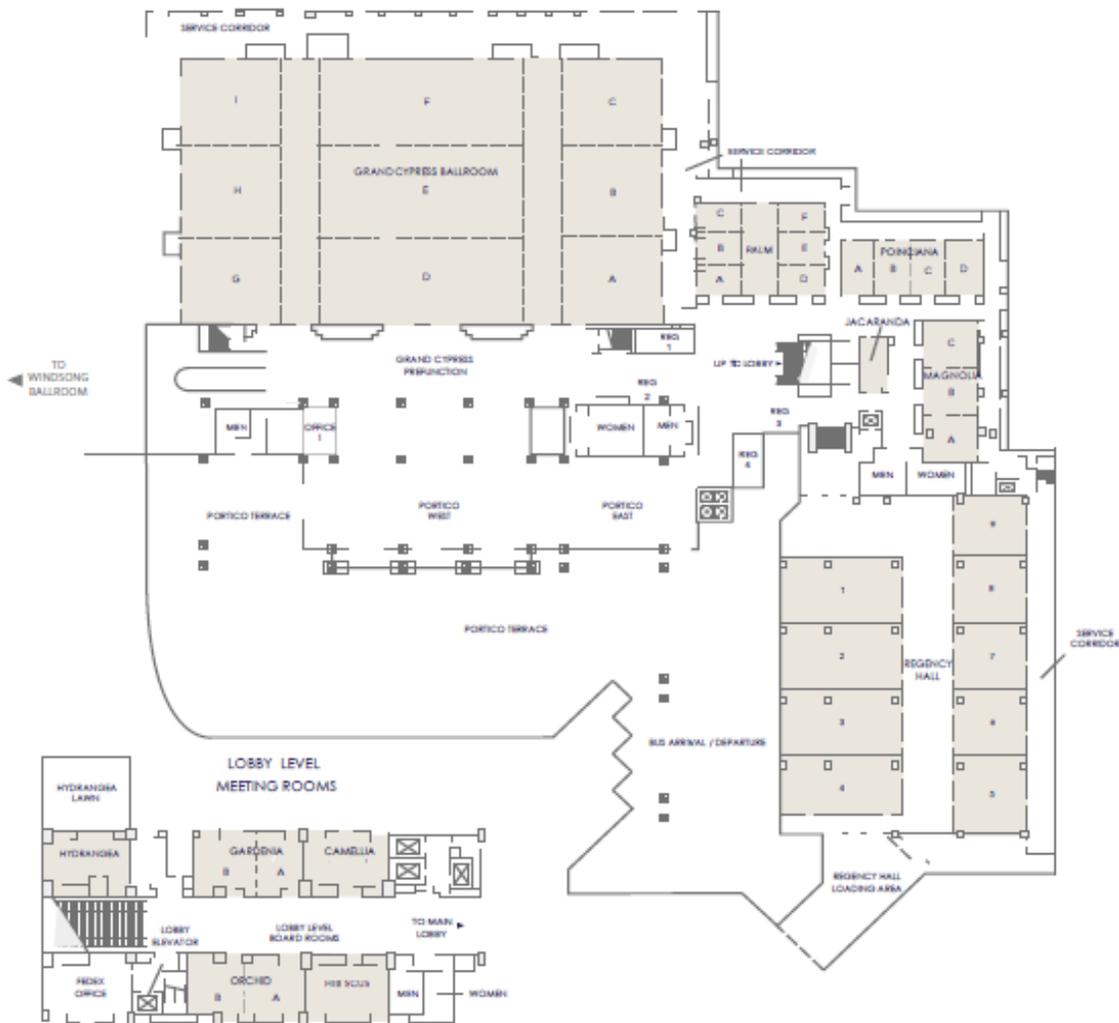


## HYATT REGENCY GRAND CYPRESS RESORT

1 Grand Cypress Boulevard  
Orlando, Florida, 32836, USA  
+1 407 239 1234  
hyattregencygrandcypress.com



### FLOOR PLAN CONVENTION LEVEL & LOBBY LEVEL



Note: \* La Cigale Entrance on lobby level

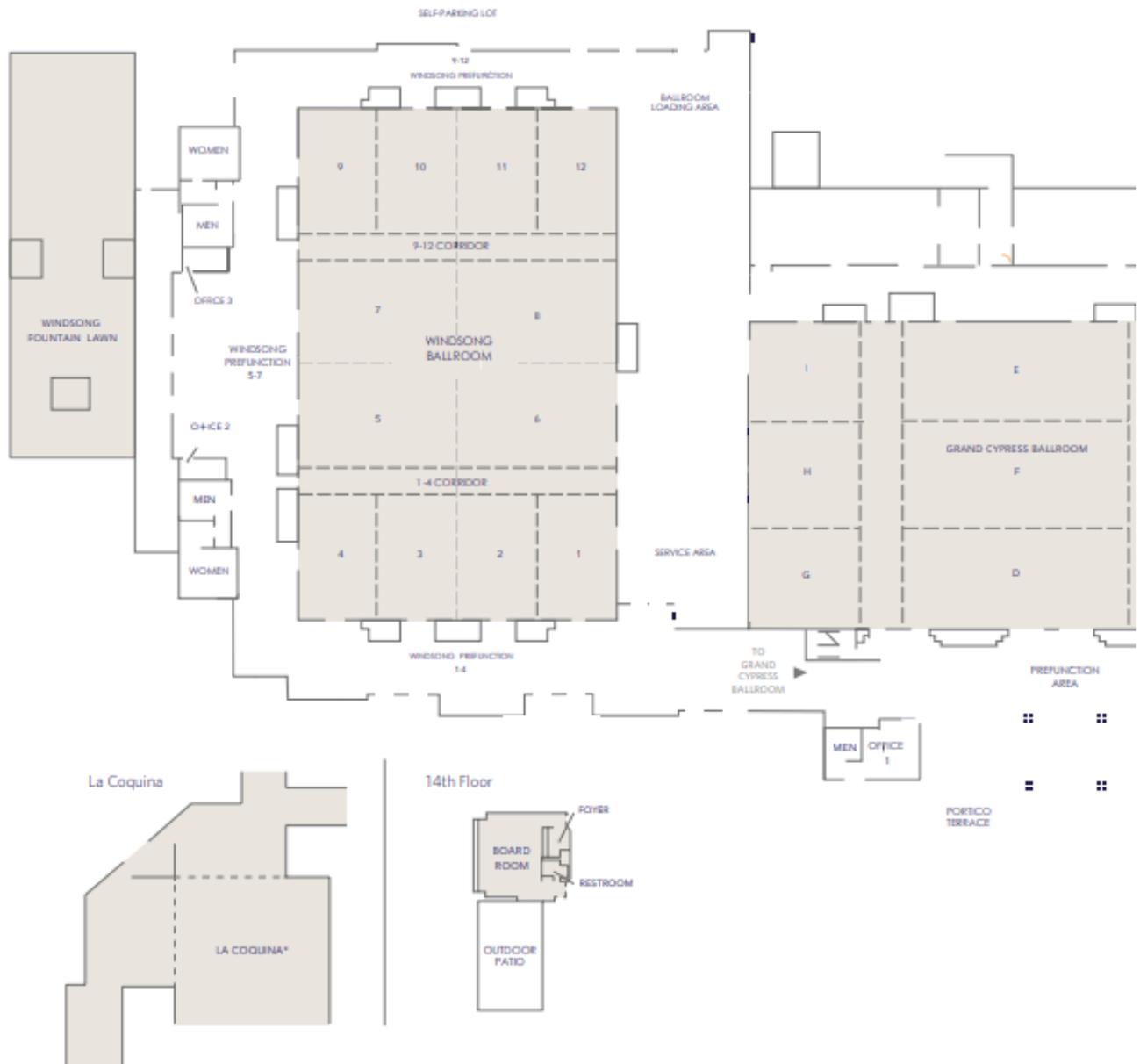


**HYATT REGENCY GRAND CYPRESS RESORT**

1 Grand Cypress Boulevard  
 Orlando, Florida, 32836, USA  
 +1 407 239 1234  
 hyattregencygrandcypress.com



**FLOOR PLAN  
 CONVENTION LEVEL & ANCILLARY SPACE**



# Executive Board

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<b>POSITION</b>	<b>NAME</b>
President	Kamia Mwango
President-Elect & Nominations	Egan Hanson
Immediate Past President & Fiscal Concerns	Dameion Lovett
Vice-President of Training	Dr. Jeanne Schurman
Secretary	Susan Ambridge
Treasurer	Chrissy Gass
Treasurer-Elect	Sedrick Brinson
Conference Chair	Kristina Chavers
Conference Co-Chair	Traci Spagnoli-Rego
Federal and State Legislative Chair	David Alexander
Global Issues Chair	Vandeen McKenzie
Vendor/Sponsorship Chair	Becky Davis
Site Selection & Event Coordinator	Laura Dickerson
Co-Site Selection & Event Coordinator	Brenda Ilojirole
Electronic Service Chairs	Tim Young & Justin Bohannon
Early Awareness/Outreach & Financial Literacy Chair	Kevin McCrary
Membership Chair/Volunteer Coordinator	Amanda Livingston
Scholarship & Charity Chair	Rachel Robinson
Grad/Professional Chair (Private/For Profit/Non-Profit)	Justin Bohannon
Vocational-Technical & Clock Hour Chair	Dr. Jeanne Schurman
OSFA Liaison	Shawn Haskin
Region I Representative	Angelica Coonts
Region II Representative	Marie Guerra-Rosado
Region III Representative	Karissa Lawson

# Conference Committee Members

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POSITION	NAME
Conference Chair	Traci Spagnoli-Rego
Conference Co-Chair	Kristina Chavers
Vice-President of Training	Dr. Jeanne Schurman
Program Chair/Curriculum Coordinator	Sara Kaufman
Membership Chair & Volunteer Coordinator	Amanda Livingston
Treasurer-Elect	Sedrick Brinson
Local Arrangement Chair	Brenda Ilojiolo
Registration/Early Awareness/Outreach/Financial Literacy Chair	Kevin McCrary
Electronic Services Chairs	Tim Young
	Justin Bohannon
Scholarship & Charity Chair	Rachel Robinson
Entertainment Coordinator	Lou Murray
Vendor/Sponsorship Chair	Becky Davis
Business Partner Liaisons	Concepta Williamson
	Kathleen Roebuck
	Pete Hernandez
Site Selection Chair	Laura Dickerson
Director Summit Co-Chair	David Alexander
Director Summit Co-Chair	Sara Kaufman

# Conference Committee Members

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## Ex-Officio Members

<b>POSITION</b>	<b>NAME</b>
FASFAA President	Kamia Mwango
FASFAA President-Elect	Egan Hanson
Treasurer	Chrissy Gass
Secretary	Susan Ambridge
FAFSAA Bookkeeper	Gwyn Francis

# Conference Agenda

## Tuesday May 27, 2025—Director’s Summit (DS)



Time	Sessions	Location
8:00 am – 4:00 pm	Registration Open (closed during lunch and Conference Opening Sessions)	Registration Desk Windsong Pre-Function
8:00 am - 1:00 pm	Exhibit Area Set Up	
8:00 am – 8:30 am	Continental Breakfast (for Director’s Summit & NASFAA Credential attendees and Conference Committee Members)	Windsong Pre-Function
8:30 am – 9:00 am	DS Opening and Welcome	Windsong 9/10
9:00 am – 10:15 am	DS Session 1: FA Office Succession Planning: Preparing for the Future	Windsong 9/10
10:15 am – 10:30 am	Transition Break	
10:30 am – 11:45 am	DS Session 2: Navigating the Path to Leadership: From Financial Aid to Enrollment Management	Windsong 9/10
11:45 am – 12:45 pm	Lunch	Windsong Main Ballroom
12:45 pm – 2:00 pm	DS Session 3: Redefining Scholarship Allocation: Legal Perspectives on Repurposing Funds Due to Changes with DEI	Windsong 9/10
2:00 pm – 2:30 pm	DS Vendor Roundtable	Windsong 9/10
2:30 pm – 2:45 pm	DS Closing	Windsong 9/10
2:45 pm – 3:45 pm	Reception for Director’s Summit Attendees & Vendors (by Invitation Only)	Hospitality Suite

**Tuesday May 27, 2025—Pre-Conference: NASFAA Credentials & LEAP**

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
8:00 am—12:00 pm	NASFAA Credential—Application Process	Windsong 2
12:00 pm – 1:00 pm	Lunch (Conference Committee, NASFAA Credential and LEAP Participants join Director’s Summit attendees)	Windsong Main Ballroom
1:00 pm – 3:00 pm	LEAP Program and Graduation	Windsong 3
1:00 pm – 3:00 pm	Exhibit Area Open	Windsong Pre-Function
2:00 pm – 2:30 pm	Moderator Session (All Moderators are required to attend)	Windsong 4



**(FASFAA Spirit Day)**

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<b>Time</b>	<b>Sessions</b>	<b>Location</b>
4:00 pm – 5:30 pm	Conference Welcome & Opening Session FASFAA Business Meeting & Elections	Main Windsong Ballroom
5:30 pm – 7:30 pm	Welcome Reception	Windsong Pre-Function
8:00 pm - 10:00 pm	Hospitality Suite Open	Hospitality Suite

## Wednesday May 28, 2025

**Region Color Day! Wear your Region colors.**

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

7:30 am – 11:30 am	Registration Open (closed during Lunch)	Registration Desk— Windsong Pre-Function
7:30 am – 11:30 am	Exhibit Area Open	Windsong Pre-Function
7:30 am – 8:30 am	<b>Continental Breakfast</b>	Windsong Pre-Function
8:30 am – 10:00 am	<b>General Session 1: <i>Legal Perspectives in Higher Education: Navigating Student Aid, Compliance, and Institutional Risk</i></b>	Main Windsong Ballroom
10:00 am – 10:15 am	Transition Break	
10:15 am – 11:15 am	Exhibit Area Open	Windsong Pre-Function
10:15 am – 11:15 am	<b>Concurrent Sessions 1</b> <b>Tracks: New   Professional Development   Innovation   Compliance   Executive Leadership</b>  <i>Comment Code Resolution</i> <i>Creating a Mentally Healthy Office</i> <i>Artificial Intelligence (AI) for Beginners</i> <i>Maintaining Institutional Compliance: A Collaborative Approach</i> <i>Program Participation Agreement (PPA)/Eligibility and Certification Approval Report (ECAR) Recertification Panel</i>	Windsong 2 Windsong 3 Windsong 4  Windsong 9/10  Windsong 11/12
11:15 am – 11:30 am	Transition Break	
11:30 am – 1:00 pm	<b>Opening Luncheon</b>  SASFAA Update  Awards & Recognitions	Main Windsong Ballroom
1:00 pm – 1:15 pm	Transition Break	
1:00 pm – 5:00 pm	Exhibit Area Open	Windsong Pre-Function
1:15 pm – 2:15 pm	<b>Concurrent Sessions 2</b> <b>Tracks: New   Intermediate   Compliance   Professional Development</b>  <i>Student Eligibility: Navigating the Complexities</i> <i>ISIR Corrections: How to Avoid Rejected Corrections</i> Gainful Employment Reporting Panel Discussion Understanding Satisfactory Academic Progress (SAP) for Clock Hours Enrollment Management in Today’s Higher Education Landscape: The Role & Influence of Financial Aid	Windsong 2 Windsong 3 Windsong 4 Windsong 9/10  Windsong 11/12
2:15 pm – 2:30 pm	Transition Break	
2:30 pm – 3:30 pm	<b>Concurrent Sessions 3</b> <b>Tracks: New   Professional Development   Compliance   Intermediate   Executive Leadership</b>  <i>Cost of Attendance Basics</i> Supporting Students with Special and Unusual Circumstances Conflicting Information OSFA State Scholarship and Grant Programs Update Changes in Athletics: Name, Image, Likeness (NIL)	Windsong 2 Windsong 3 Windsong 4 Windsong 9/10 Windsong 11/12

3:30 pm – 3:45 pm	Transition Break	
3:45 pm – 5:00 pm	<b>General Session 2:</b> <i>Leading with Integrity, Resilience, and Heart, With an Empty Cup</i>	Main Windsong Ballroom
5:30 pm – 8:00 pm	<b>Business Partner Hosted Dine Around Town (BYOD - Buy Your Own Dinner)</b>  <i>Join our business partners to explore the culinary arts of the local area</i>	
8:00 pm – 10:00 pm	<b>Hospitality Suite Open</b>	Hospitality Suite

## Thursday May 29, 2025

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

7:30 am – 11:30 am	Registration Open (closed during Lunch)	
7:30 am – 9:00 am	<b>Continental Breakfast</b> Exhibit Area Open	Windsong Pre-Function
9:00 am – 10:00 am	<b>Concurrent Sessions 4</b> <b>Tracks: New   Intermediate   Professional Development   Compliance</b>  Financial Aid Basics Financial Literacy: Empowering Students for Financial Success The Impact of Association Involvement on Your Professional Career Return of Title IV R2T4 for Clock Hours: What You Need to Know	Windsong 2 Windsong 3  Windsong 4  Windsong 9-10
10:00 am – 10:15 am	Transition Break Exhibit Area Open	
10:15 am – 11:15 am	<b>Concurrent Sessions 5</b> <b>Tracks: Intermediate   Professional Development   Compliance   Executive Leadership</b>  Revolutionizing FWS: Empowering Students and Enhancing Campus Collaboration Customer Service in Financial Aid: Best Practices for Student Satisfaction Course Program of Study: Navigating Challenges and Unlocking Benefits Effective Audit Preparation & Policy Management for Financial Aid Professionals	Windsong 3  Windsong 4  Windsong 9/10  Windsong 11/12
11:15 am – 11:20 am	Transition Break	
11:20 am – 1:00 pm	Lunch on your own  <b>Business Partners Learn, then Lunch! "The Gap: A Funding Discussion" - Grab a seat and enjoy lunch on FASFAA.</b>	Windsong Main Ballroom
1:00 pm – 5:00 pm	Exhibit Area Open	

1:00 pm—1:15 pm	Transition Break	
1:15 pm – 2:15 pm	<p><b>Concurrent Sessions 6</b>  <b>Tracks: Compliance   Innovation   Intermediate   Executive Leadership</b></p> <p>Compliance for Graduate/Professional Programs  Maximizing Efficiency in the Financial Aid Office  Navigating Student Citizenship Status  FISAP: Key Considerations for Title IV Reporting</p>	<p>Windsong 3  Windsong 4  Windsong 9/10  Windsong 11/12</p>
2:15 pm – 2:30 pm	Transition Break	
4:00 pm – 5:00 pm	<p><b>Concurrent Sessions 7</b>  <b>Tracks: Innovation   Intermediate / Executive Leadership</b></p> <p>Managing Financial Aid Communication in a CRM  AI's Role in Financial Aid Succession Planning: Unlocking Leadership Potential  Integration of Work and Play in the Workplace  Timing is Everything: Transforming Financial Aid for Enrollment Success</p>	<p>Windsong 2  Windsong 3</p> <p>Windsong 9/10  Windsong 11/12</p>
3:30 pm—4:00 pm	Snack Break	
4:00 pm—5:00 pm	<p><b>Concurrent Sessions 8 – Birds of a Feather</b></p> <p>State University System (SUS)  Private For-Profit Schools  Independent Colleges and Universities of Florida (ICUF)  Technical/Clock Hour Schools  State Colleges  Business Partners</p>	<p>Windsong 2  Windsong 3</p> <p>Windsong 4  Windsong 9/10  Windsong 11/12  Windsong Ballroom</p>
4:00 pm – 6:00 pm	Exhibitor Breakdown	
5:00 pm – 7:00 pm	<b><i>Dinner on your own</i></b>	
7:00 pm – 11:00 pm	<b>FASFAA Galactic Gala &amp; Cosmic Night Party</b>	

## Friday May 30, 2025

8:00 am – 9:00 am	<b>Breakfast</b>	Windsong Pre-Function
9:00 am – 9:45 am	<b>General Session 4 – NASFAA Update</b>	Main Windsong Ballroom
9:45 am – 10:45 am	<b>General Session 5 – Federal Update</b>	Main Windsong Ballroom
10:45 am – 12:00 pm	<b>Closing Session</b> FASFAA Business Meeting (Election Results) FASFAA First Look/Reveal Passing of the Gavel Closing	Main Windsong Ballroom



***We've given you some extra time throughout this agenda to spend with our Business Partners during the week of the conference.***

# Detailed Agenda

Tuesday May 27, 2025 – Director’s Summit (DS)

Time	Sessions	Location
8:00 am – 4:00 pm	Registration Open	Registration Desk Windsong Pre-Function
8:00 am – 8:30 am	Director’s Summit Registration and Continental Breakfast	Windsong Pre-function
8:30 am – 9:00 am	Opening and Welcome	<b>Windsong 9/10</b>
9:00 am – 10:15 am	<b>DS Session 1: FA Office Succession Planning: Preparing for the Future</b>  This session will guide you through the process of identifying and developing future leaders, creating mentorship opportunities, and ensuring a smooth transition when key staff members retire or move on.  <b>Presenters:</b> Michael Bennett, St. Petersburg College (Retiree) Bill Spiers, Tallahassee State College  <b>Moderators:</b> David Alexander, ECPI University Sara Kaufman, College Aid Services	<b>Windsong 9/10</b>
10:15 am – 10:30 am	Transition Break	
10:30 am – 11:45 am	<b>DS Session 2: Navigating the Path to Leadership: From Financial Aid to Enrollment Management</b>  This presentation explores the benefits of centralizing financial aid processes and establishing a one-stop shop to enhance student services. Learn how to improve efficiency, reduce confusion, and create a seamless experience for students by integrating financial aid, admissions, registration, and other key departments. We’ll discuss best practices, implementation challenges, and strategies for gaining institutional buy-in to transform student support services.  <b>Presenters:</b> Nadine Bailey, Ultimate Medical Academy Alicia Keaton, University of Central Florida  <b>Moderators:</b> David Alexander, ECPI University Sara Kaufman, College Aid Services	<b>Windsong 9/10</b>

## Tuesday May 27, 2025 – Director’s Summit

Time	Sessions	Location
11:45 am – 12:45 pm	Lunch	Windsong Main Ballroom
12:45 pm – 2:00 pm	<p><b>DS Session 3: Redefining Scholarship Allocation: Legal Perspectives on Repurposing Funds Due to Changes with DEI</b></p> <p>In the evolving landscape of higher education, institutions are reexamining the alignment of scholarship programs with Diversity, Equity, and Inclusion (DEI) objectives. This session, led by a legal expert specializing in higher education law, will delve into the legal frameworks surrounding scholarship repurposing. Participants will gain insights through case studies and legal analyses; attendees will learn strategies to adapt scholarship programs effectively while maintaining legal integrity.</p> <p><b>Presenter:</b> Kristina Raattama, MK Consulting</p> <p><b>Moderators:</b> David Alexander, ECPI University Sara Kaufman, College Aid Services</p>	Windsong 9/10
2:00 pm – 2:30 pm	Vendor Roundtable	Windsong 9/10
2:30 pm – 2:45 pm	Closing Session	Windsong 9/10
2:45 pm – 3:45 pm	Reception for Financial Aid Director Summit Attendees & Vendors (Invite Only)	Hospitality Suite
2:00 pm – 2:30 pm	<p><b>Moderator Session:</b> Moderator Session (All Moderators are required to attend)</p> <p>This session will welcome our volunteers who agreed to Moderate sessions during the conference. The session will discuss the expectations and requirements for serving in the Moderator role.</p> <p><b>Presenter:</b> Dr. Jeanne Schurman, Hillsborough Community College</p>	Windsong 4
4:00 pm – 5:30 pm	<p><a href="#">Conference Welcome &amp; Opening Session</a></p> <p><a href="#">FASFAA Business Meeting</a></p>	Main Windsong Ballroom
5:30 pm – 7:30 pm	<p>Welcome Reception</p> <p>Dinner On Your Own</p>	Windsong Pre-Function
8:00 pm - 10:00 pm	Hospitality Suite Open	Hospitality Suite

## Wednesday, May 28, 2025 – Region Colors Day

***Wear your Region colors.***

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

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>7:30 am – 11:30 am</b>	Registration Open	Registration Desk
<b>7:30 am - 8:30 am</b>	Continental Breakfast	<b>Windsong Pre-Function</b>
<b>8:30 am – 10:00 am</b>	<p><b>General Session:</b> Legal Perspectives in Higher Education: Navigating Student Aid, Compliance, and Institutional Risk</p> <p>Led by a seasoned higher education attorney with experience as General Counsel at state universities, this session will explore legal and policy developments impacting financial aid and institutional operations. Topics will include executive orders, state and federal legislation, ongoing litigation, and compliance requirements. Attendees will gain a legal perspective on how these changes affect DEI initiatives, scholarship eligibility, student loan policies, and Title IV compliance—and how legal counsel supports institutional risk management and student equity.</p> <p><b>Presenter:</b> Kristina Raattama, MK Consulting</p> <p><b>Moderator:</b> Brenda M. Brown, College Aid Services</p>	<b>Main Windsong Ballroom</b>
<b>10:00 am - 10:15 am</b>	Transition Break	
<b>10:00 am – 11:15 am</b>	Exhibit Area Open	
<b>10:15 am – 11:15 am</b>	<p><b>Concurrent Sessions 1</b></p> <p><b>Comment Code Resolution</b></p> <p>Comment codes in the ISIR are often the source of confusion. This session will cover how to efficiently resolve comment codes, ensuring students' financial aid processes are not delayed. Learn practical tips, common issues, and how to handle challenging cases.</p> <p><b>Presenter:</b> Heidi Pinney, Daytona State College</p> <p><b>Moderator:</b> Susan Ambridge, Valencia College</p>	<b>Windsong 2</b>

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>10:15 am – 11:15 am</b>	<b>Creating a Mentally Healthy Office</b> Financial Aid Offices play a crucial role in shaping students' experiences and ensuring their access to education. But the pressures and stresses that come with managing financial aid can often create an environment that feels tense or overwhelming. In today's presentation, we will explore how we can foster a mentally healthy environment in our financial aid offices one that supports the well-being of both students and staff, and contributes to a more positive, productive office culture.  <b>Presenters:</b> Lou Murray, Earnest Jessica Ly, Florida International University  <b>Moderator:</b> Pedro Hernandez, OSFA	<b>Windsong 3</b>
<b>10:15 am – 11:15 am</b>	<b>Artificial Intelligence (AI) for Beginners</b> Learn the basics of AI and how it can be useful to you and your team. An interactive session with exercises to help people learn how to use AI tools.  <b>Presenters:</b> Tim Young, Navy Federal Credit Union Amanda Livingston, University of South Florida—Health  <b>Moderator:</b> Kathleen Roebuck, Monogram	<b>Windsong 4</b>
<b>10:15 am – 11:15 am</b>	<b>Maintaining Institutional Compliance: A Collaborative Approach</b> Maintaining compliance is a collective responsibility. This session will discuss how financial aid professionals can work collaboratively with other departments to ensure institutional compliance with federal and state regulations, and how to stay on top of evolving requirements.  <b>Presenters:</b> Nadine Bailey, Ultimate Medical Academy David Alexander, ECPI University  <b>Moderator:</b> Angelica Coonts, Pensacola State College	<b>Windsong 9-10</b>

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>10:15 am – 11:15 am</b>	<b>PPA/ECAR Recertification Panel</b> Recertifying your PPA and ECAR is a vital process for maintaining Title IV eligibility. Join a panel of experienced financial aid professionals as they walk through the recertification process, common pitfalls, and tips for a smooth and successful recertification experience. <b>Presenters:</b> Leigh Ann Hussey, University of West Georgia Bill Spiers, Tallahassee State College <b>Moderator:</b> Andrew Weaver, Kentucky Higher Education Student Loan Corporation	<b>Windsong 11-12</b>
<b>11:15 am – 11:30 am</b>	Transition Break	
<b>11:30 am – 1:00 pm</b>	Opening Luncheon <ul style="list-style-type: none"><li>• SASFAA Update</li></ul> <b>Presenters:</b> Leigh Ann Hussey, University of West Georgia <ul style="list-style-type: none"><li>• Elections</li><li>• Awards &amp; Recognitions</li></ul>	<b>Main Windsong Ballroom</b>
<b>1:00 pm – 5:00 pm</b>	Exhibit Area Open	<b>Windsong Pre-Function</b>
<b>1:00 pm – 1:15 pm</b>	Transition Break	
<b>1:15 pm – 2:15 pm</b>	<b>Concurrent Sessions 2</b> <b>Student Eligibility: Navigating the Complexities</b> Gain a comprehensive understanding of student eligibility requirements for federal student aid. This session will cover federal student aid eligibility criteria, along with common challenges and strategies for ensuring compliance. Learn best practices for verifying eligibility and addressing issues that arise during the application process. <b>Presenters:</b> Kevin McCrary, Bethune-Cookman University Patricia McSparin, Broward College <b>Moderator:</b> Angela Nickel, Florida State College at Jacksonville	<b>Windsong 2</b>

Time	Sessions	Location
1:15pm – 2:15pm	<p><b>ISIR Corrections: How to Avoid Rejected Corrections</b></p> <p>A critical part of the financial aid process is ensuring that ISIR data is correct. This session will provide practical tips for efficiently processing ISIR corrections through the FAFSA Partner Portal (FPP), avoiding common mistakes, and improving the accuracy of your students' records.</p> <p><b>Presenters:</b> Anh Do, University of Miami</p> <p><b>Moderator:</b> Paul Gilroy, ProEducation Solutions</p>	<b>Windsong 3</b>
1:15pm – 2:15 pm	<p><b>Gainful Employment Reporting Panel Discussion</b></p> <p>This panel discussion will provide insights into the requirements and challenges of Gainful Employment (GE) reporting. Learn about the latest updates, best practices for compliance, and strategies for navigating the complex GE reporting process in your institution.</p> <p><b>Presenters:</b> Kristine Hibbard, Florida State College at Jacksonville Vandeen McKenzie, Embry-Riddle Aeronautical University Tammy Tomfohrde, Lincoln Memorial University</p> <p><b>Moderator:</b> Sara Kaufman, College Aid Services</p>	<b>Windsong 4</b>
1:15pm – 2:15 pm	<p><b>Understanding Satisfactory Academic Progress (SAP) for Clock Hours</b></p> <p>Ensuring compliance with Satisfactory Academic Progress (SAP) standards is essential for maintaining financial aid eligibility, especially for clock hour programs. This session will explore the unique challenges and requirements of SAP for clock hour students, including how to calculate and monitor progress, handle warnings and appeals, and maintain accurate documentation. Attendees will gain a clear understanding of how to establish and implement effective SAP policies tailored to clock hour programs, ensuring both compliance and student success in meeting federal and state financial aid requirements.</p> <p><b>Presenters:</b> Dr. Jeanne Schurman, Hillsborough Community College</p> <p><b>Moderator:</b> Patricia King, Ultimate Medical Academy</p>	<b>Windsong 9-10</b>

Time	Sessions	Location
1:15pm –2:15pm	<p><b>Enrollment Management in Today’s Higher Education Landscape: The Role &amp; Influence of Financial Aid</b></p> <p>In today’s evolving higher education landscape, enrollment management requires a strategic and data-informed approach to recruiting, retaining, and supporting students. This session explores the critical role financial aid offices play in shaping enrollment strategies, ensuring affordability, and driving student success. By the end of this session, attendees will gain insights into aligning financial aid practices with broader institutional strategies, utilizing data to inform decision-making, and proactively addressing challenges to ensure a sustainable and student-centered enrollment management approach.</p> <p><b>Presenter:</b> Alicia Keaton, University of Central Florida</p> <p><b>Moderator:</b> Katie Mueller, Colleging</p>	Windsong 11-12
2:15 pm – 2:30 pm	Transition Break	
2:30 pm – 3:30 pm	<p><b>Concurrent Sessions 3</b></p> <p><b>Cost of Attendance Basics</b></p> <p>Understanding the Cost of Attendance (COA) is crucial for determining aid eligibility. This session will cover the components of COA, how to adjust for specific circumstances, and the importance of accurate COA calculations in ensuring compliance and providing fair financial aid packages.</p> <p><b>Presenters:</b> Kristina Chavers, University of Central Florida Brenda M. Brown, College Aid Services</p> <p><b>Moderator:</b> Amy Gerber, ScholarNet</p>	Windsong 2
2:30 pm – 3:30 pm	<p><b>Supporting Students with Special and Unusual Circumstances</b></p> <p>An overview of the difference between Dependency Overrides, Unaccompanied Homeless Youth Determinations, and other types of Professional Judgment requests. The session will also cover the regulatory requirements for communicating institutional policies with students under the FAFSA Simplification Act.</p> <p><b>Presenter:</b> Suzanne Paton, FAAC, Florida Atlantic University</p> <p><b>Moderator:</b> Kevin McCrary, Bethune-Cookman University</p>	Windsong 3

**Wednesday, May 28, 2025 – Cont.**

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<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>2:30 pm – 3:30 pm</b>	<b>Conflicting Information</b> Financial aid offices often face situations involving conflicting information. This session will teach you how to identify conflicting information, how to resolve discrepancies, and how to document your findings in compliance with federal regulations. <b>Presenters:</b> Jessica Ly, Florida International University Sara Kaufman, College Aid Services <b>Moderator:</b> Guadalupe Diaz, Broward College	<b>Windsong 4</b>
<b>2:30 pm – 3:30 pm</b>	<b>OSFA State Scholarship and Grant Programs Update</b> Provide an update and overview of Florida's State Scholarship and Grant Programs from the Florida Department of Education's, Office of Student Financial Assistance. <b>Presenter:</b> Shawn Haskin, Florida Department of Education's, Office of Student Financial Assistance <b>Moderator:</b> Jody Walker, Southeastern University	<b>Windsong 9-10</b>
<b>2:30 pm – 3:30 pm</b>	<b>Changes in Athletics: Name, Image, and Likeness (NIL)</b> Please join a colleague from Athletics who will share an overview and perspective of the NIL World. <b>Presenter:</b> Kathryn Jones, University of Central Florida <b>Moderator:</b> Sedrick Brinson, University of Central Florida	<b>Windsong 11-12</b>
<b>3:30 pm – 3:45 pm</b>	Transition Break	

**Please do not forget to visit with our Business Partners and thank them for their continued support of FASFAA.**

## Wednesday, May 28, 2025 – Cont.

Time	Sessions	Location
3:45 pm – 5:00 pm	<p><b>General Session:</b> Leading with Integrity, Spirit, and Heart Even When Your Cup is Empty</p> <p>As a financial aid professional, you're no stranger to giving your all — to students, colleagues, and the institution. But what happens when there's nothing left to give? In this session, we'll dive into the reality of leading with an empty cup — and why refilling it is not only essential, but a powerful step toward long-term success. Through open, honest reflection and practical, easy-to-apply strategies, we'll explore how to stay energized and authentic while continuing to make an impact.</p> <p>This isn't just another session about burnout — it's about leading with heart, resilience, and integrity, even when you're stretched thin. Join us for a session that looks to restore your energy, shift your mindset, and remind you of the incredible difference you make. You'll leave feeling empowered, ready to take on tomorrow, and equipped to lead from a place of strength and authenticity.</p> <p><b>Presenter:</b> Alicia Keaton, University of Central Florida</p> <p><b>Moderator:</b> Mia Mwango, Santa Fe College Business Partner Dine Around (Join our Business Partners to explore the culinary arts of the local area.</p>	Main Windsong Ballroom
6:30 pm – 8:00 pm	BYOD! (Buy your own dinner)	
8:00 pm – 10:00 pm	Hospitality Suite Open	



## Thursday May 29, 2025 – Spirit Day!

**Wear clothing that represents your school/company.**

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>7:30 am – 11:30 am</b>	Registration Open	Registration Desk
<b>7:30 am – 9:00 am</b>	Continental Breakfast	<b>Windsong Pre-Function</b>
<b>7:30 am – 9:00 am</b>	Exhibit Area Open	<b>Windsong Pre-Function</b>
<b>9:00 am – 10:00 am</b>	<b>Concurrent Sessions 4</b>	
	<b>Financial Aid Basics</b> New to financial aid or looking for a refresher? This session will provide a solid foundation in the basics of financial aid, covering key concepts such as need analysis, awarding aid, and federal student aid programs. <b>Presenter:</b> Kristine Hibbard, Florida State College at Jacksonville <b>Moderator:</b> Marie Guerra Rosado, University of Florida	<b>Windsong 2</b>
<b>9:00 am – 10:00 am</b>	<b>Financial Literacy: Empowering Students for Financial Success</b> Financial literacy is essential for student success both in and out of the classroom. This session will explore effective strategies for teaching students key financial concepts, such as budgeting, managing student loans, credit, and saving. Learn how to integrate financial literacy into your office's resources, provide students with the tools to make informed financial decisions, and empower them to take control of their financial futures. <b>Presenter:</b> Karemah Manselle, University of Central Florida <b>Moderator:</b> Alexandra Miller, MOHELA	<b>Windsong 3</b>

**Thursday, May 29, 2025 – Cont.**

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<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>9:00 am – 10:00 am</b>	<p><b>The Impact of Association Involvement On Your Professional Career</b></p> <p>Being an active member of professional associations like FASFAA can have a profound impact on your career in financial aid. This session will highlight the benefits of association involvement, from networking opportunities and professional development to leadership roles and career advancement. Attendees will hear personal stories and practical tips on how to leverage association membership at the state, regional and national levels to boost their career and grow within the field.</p> <p><b>Presenters:</b> Sarah Baumhoff, Kennesaw State University Leigh Ann Hussey, University of West Georgia Dameion Lovett, University of South Florida</p> <p><b>Moderator:</b> Dr. Jeanne Schurman, Hillsborough Community College</p>	<b>Windsong 4</b>
<b>9:00 am – 10:00 am</b>	<p><b>Return to Title IV (R2T4) for Clock Hours: What You Need to Know</b></p> <p>Understanding the Return to Title IV (R2T4) process for clock-hour programs can be complicated. This session will cover the specific challenges of R2T4 for clock-hour institutions, including calculations, timeframes, and proper documentation.</p> <p><b>Presenter:</b> Dr. Jeanne Schurman, Hillsborough Community College</p> <p><b>Moderator:</b> Stephanie Anderson, Orange Technical College</p>	<b>Windsong 9-10</b>
<b>10:00 am – 10:15 am</b>	Transition Break	<b>Windsong Pre-Function</b>
<b>10:00 am – 10:15 am</b>	Exhibit Area Open	

**10:15 am – 11:15 am Concurrent Sessions 5**

**Revolutionizing FWS: Empowering Students and Enhancing Campus Collaboration**

**Windsong 3**

Unlock the full potential of your Federal Work-Study program with Florida Atlantic University's innovative approach to career readiness! In this dynamic session, we will share how strategic campus partnerships have elevated our Work-Study program, creating meaningful career pathways for students while strengthening engagement with key campus stakeholders. Discover how our collaborations with the Career Center, Office of Undergraduate Research, and other departments have streamlined processes, enhanced student experiences, and expanded opportunities for on-campus internships and research—all funded by Federal Work-Study. Learn practical strategies to structure your program in a way that equips students with essential skills, professional exposure, and financial support, setting them up for long-term success. Whether you're looking to revamp your existing program or build stronger institutional partnerships, this session will provide actionable insights and innovative ideas.

**Presenters:**

Kelsie McKittrick, Florida Atlantic University

**Moderator:**

Becky Davis, Ascendium Education

**10:15 am – 11:15 am Customer Service in Financial Aid: Best Practices for Student Satisfaction**

**Windsong 4**

Delivering excellent customer service is key to building a positive experience for students. This session will provide tips on improving communication, handling difficult situations, and fostering a student-centered approach in your financial aid office.

**Presenter:**

Karemah Manselle, University of Central Florida

**Moderator:**

Irma Molinares, College Aid Services

**Thursday, May 29, 2025 – Cont.**

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<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>10:15 am – 11:15 am</b>	<p><b>Course Program of Study: Navigating Challenges and Unlocking Benefits</b></p> <p>Ensuring compliance while maximizing student success can be a balancing act, and Course Program of Study (CPOS) is at the heart of the challenge. This session will dive into the complexities of CPOS, highlighting common obstacles faced by financial aid professionals, including system limitations, communication barriers, and policy interpretation. We'll also explore the significant benefits CPOS offers, such as improved compliance, optimized financial aid packaging, and enhanced academic advising. Attendees will leave with practical strategies for effective CPOS implementation, lessons learned from real-world experiences, and tips to foster collaboration across campus departments.</p> <p><b>Presenter:</b> Sarah Baumhoff, Kennesaw State University</p> <p><b>Moderator:</b> Jean Imes, College of Central Florida</p>	<b>Windsong 9-10</b>
<b>10:15 am – 11:15 am</b>	<p><b>Effective Audit Preparation and Policy Management for Financial Aid Professionals</b></p> <p>Preparing for a financial aid audit and establishing robust policies and procedures are critical elements for a successful and compliant financial aid operation. In this session, attendees will learn practical strategies for preparing for a financial aid audit, including how to address common audit findings proactively. Additionally, the session will cover the importance of developing, reviewing, and maintaining comprehensive policy manuals to ensure compliance with federal, state, and institutional requirements. Whether you're new to the process or looking to enhance your current practices, this session will provide essential tools and tips for maintaining smooth, efficient operations in your financial aid office.</p> <p><b>Presenters:</b> Anh Do, University of Miami Heidi Pinney, Daytona State College</p> <p><b>Moderator:</b> Alexandria Arnold, Indian River State College</p>	<b>Windsong 11-12</b>

Time	Sessions	Location
11:15 am – 11:20 am	Transition Break	
11:20 am - 12:15pm	<p>Join Lou Murray from Earnest, Tiim Young from Navy Federal Credit Union, and Chansone Durden from Navy Federal Credit Union, for a dynamic conversation. With changes looming for PLUS and Grad PLUS programs, questions around private loans are growing. This session offers an objective comparison of Federal PLUS and private education loans to help you understand the key differences and make informed decisions. <b><u>Grab a seat at this session—and enjoy lunch on FASFAA!</u></b></p>	Windsong Ballroom
12:15 pm—1:15 pm	Lunch on your own	
1:00 pm – 5:00 pm	Exhibit Area Open	
1:15 pm – 2:15 pm	<p><b>Concurrent Sessions 6</b></p> <p><b>Compliance for Graduate/Professional Programs</b></p> <p>Financial aid compliance for graduate and professional programs presents unique challenges. This session will focus on the specific regulations and best practices for administering financial aid in these programs, including budgeting, awarding, and reporting.</p> <p><b>Presenters:</b> Joan Bailey, University of South Florida Health Doug Stupec, Florida Atlantic University Health Tammy Tomfohrde, Lincoln Memorial University</p> <p><b>Moderator:</b> Egan Hanson, Schiller International University</p>	Windsong 3
1:15 pm – 2:15 pm	<p><b>Maximizing Efficiency in the Financial Aid Office</b></p> <p>Discover practical strategies to improve efficiency and student service in your financial aid office through planning, staffing, and technology. This interactive session will highlight real-world examples, including building operational calendars, including student workers in your staffing resources, leveraging SIS automation, and implementing customer service queue systems. Attendees are encouraged to share challenges and solutions in a collaborative discussion focused on doing more with less.</p> <p><b>Presenters:</b> Brenda Brown, College Aid Services Dameion Lovett, University of South Florida Dr. Ray Nault, College Aid Services</p> <p><b>Moderator:</b> Arminta Johnson, Lake-Sumter State College</p>	Windsong 4

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>1:15 pm – 2:15 pm</b>	<b>Navigating Student Citizenship Status</b>  As financial aid professionals, it's crucial to understand the complexities surrounding student citizenship status when determining eligibility for federal and state aid. This session will delve into the key regulations, documentation requirements, and best practices for evaluating the citizenship and immigration status of students. Attendees will gain a comprehensive understanding of the different citizenship categories (U.S. citizens, U.S. nationals, eligible non-citizens, and ineligible non-citizens) and the corresponding financial aid eligibility criteria. Through real-world scenarios and interactive discussions, this session will equip participants with the tools needed to make accurate eligibility determinations and ensure compliance with federal and state regulations, all while providing a fair and equitable experience for students.  <b>Presenters:</b> Sean Johnson, Hillsborough Community College Alejandra Gutierrez, Hillsborough Community College  <b>Moderator:</b> Monica Hayes, University of Miami	<b>Windsong 9-10</b>
<b>1:15 pm – 2:15 pm</b>	<b>FISAP: Key Considerations for Title IV Reporting</b>  Learn the ins and outs of the FISAP (Fiscal Operations Report and Application to Participate) process. This session will cover common challenges, reporting requirements, and tips for submitting accurate and timely FISAP reports.  <b>Presenter:</b> Vandeen McKenzie, Embry-Riddle Aeronautical University  <b>Moderator:</b> Nicole Verrett, FAS	<b>Windsong 11-12</b>

**We are so  
thankful for our  
"Presenters and Moderator"**

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>2:30 pm – 3:30 pm</b>	<b>Concurrent Sessions 7</b> <b>Managing Financial Aid Communication in a CRM</b> <p>This session will explore firsthand experiences of implementing a Customer Relationship Management (CRM) tool for financial aid communication. We will examine how to create communication plans, automated communication, and personalized communication in different modalities to improve recruitment and retention. Many schools have implemented CRMs for enrollment management, learn how to partner with multiple departments to create a shared communication strategy. Come ready to participate in a conversation about maximizing your communication plans. The presentation will focus on communication plans and tactics that can be applied with or without a CRM. It will highlight the use of the TargetX CRM on Salesforce.</p> <p><b>Presenter:</b> Arminta Johnson, Lake-Sumter State College</p> <p><b>Moderator:</b> Tim Young, Navy Federal Credit Union</p>	<b>Windsong 2</b>
<b>2:30 pm – 3:30 pm</b>	<b>AI's Role in Financial Aid Succession Planning: Unlocking Leadership Potential</b> <p>Given the well-documented staffing challenges in student financial aid, the need for effective and efficient succession planning has never been more critical. Prudent use of innovation through AI can help ensure organizational stability and continuity by identifying, developing, and preparing employees to fill essential leadership and other crucial staff roles. This session will cover how AI can significantly improve succession planning by offering data-driven insights, streamlining processes, and enhancing decision making to ensure that the right people are prepared for key roles. Our panel will compare and contrast the traditional framework of staff management to available AI tools that have the potential to make succession planning more proactive, data-driven, and equitable.</p> <p><b>Presenter:</b> Bill Ayers, College Ave Student Loans Francisco Valines, Florida International University</p> <p><b>Moderator:</b> Daisy Tabachow, Advent Health University</p>	<b>Windsong 3</b>

## Thursday, May 29, 2025 – Cont.

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>2:30 pm – 3:30 pm</b>	<b>Integration of Work and Play in the Workplace</b> Maintaining a healthy work-life balance is essential for well-being and productivity. In this session, we will explore how integrating elements of "play" into the workplace can enhance team dynamics, reduce stress, and increase overall job satisfaction. Discover fun and effective strategies for creating a positive office culture where work and relaxation coexist, helping employees feel motivated and engaged while maintaining high performance. <b>Presenter:</b> Joan Bailey, University of South Florida Health <b>Moderator:</b> Nealyn Lea, Bethune-Cookman University	<b>Windsong 9-10</b>
<b>2:30 pm – 3:30 pm</b>	<b>Timing is Everything: Transforming Financial Aid for Enrollment Success</b> Financial aid timing can make or break student enrollment decisions. With 73% of students willing to switch institutions if aid processing takes longer than four weeks, the stakes are higher than ever. In this session, we explore how the Better Financial Aid Model helps institutions streamline operations, ensuring timely financial aid offers that drive enrollment and retention. <b>Presenters:</b> Maureen Anderson, FAS Chrystal Ingram, Beacon College <b>Moderator:</b> Concepta Williamson, Citizens Student Loans	<b>Windsong 11-12</b>
<b>3:30 pm – 4:00 pm</b>	Snack Break	
<b>4:00 pm – 5:00 pm</b>	Birds of a Feather <b>State University System (SUS)</b> <b>Moderator:</b> Marie Guerra Rosado, University of Florida <b>Private For-Profit Schools</b> <b>Moderator:</b> Egan Hanson, Schiller International University	<b>Windsong 2</b>  <b>Windsong 3</b>

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
	<b>Independent Colleges and Universities of Florida (ICUF)</b> <b>Moderator:</b> Jody Walker, Southeastern University	<b>Windsong 4</b>
	<b>Technical/Clock Hour Schools</b> <b>Moderator:</b> Dr. Jeanne Schurman, Hillsborough Community College	<b>Windsong 9-10</b>
	<b>State Colleges</b> <b>Moderator:</b> Mia Mwango, Santa Fe College	<b>Windsong 11-12</b>
	<b>Business Partners</b> <b>Moderators:</b> Brenda M. Brown, College Aid Services Becky Davis, Ascendium	<b>Windsong Main Ballroom</b>
<b>4:00 pm – 6:00 pm</b>	Exhibitor Breakdown	<b>Windsong Pre-Function</b>
<b>5:00 PM – 7:00 PM</b>	Dinner On Your Own	
<b>7:00 pm – 11:00 pm</b>	Galactic Gala & Cosmic Night Party	<b>Main Windsong Ballroom</b>

**We are**  
**"Galactic Guardians"**  
**of a**  
**Whole New World.**

**Friday, May 30, 2025 – Cont.**

<b>Time</b>	<b>Sessions</b>	<b>Location</b>
<b>8:00 am – 9:00 am</b>	Breakfast	<b>Windsong Pre-Function</b>
<b>9:00 am – 9:45 am</b>	<b>NASFAA Spotlight</b>  Our NASFAA Past Chair, Helen Faith will provide an update on national association activities, professional development and training opportunities, and the volunteer and public policy work of the association. Learn how you can get involved.  <b>Presenter:</b> Helen Faith, Past NASFAA National Chair	<b>Main Windsong Ballroom</b>
<b>9:00 am – 10:45 am</b>	<b>Federal Update</b>  This session will provide the latest information from the U.S. Department of Education including updates on Title IV regulations, FAFSA simplification, and student loan policy changes. Attendees will gain valuable insight into recent legislative developments, upcoming deadlines, and anticipated changes impacting aid administration.  <b>Presenter:</b> Dr. Heather Boutell, Vanderbilt University School of Medicine	<b>Main Windsong Ballroom</b>
<b>10:45 am – 12:00 pm</b>	<b>Closing Session</b>  FASFAA Business Meeting (Election Results)  FASFAA First Look/Reveal  Passing of the Gavel  Closing	<b>Main Windsong Ballroom</b>



**Safe Travels**



# 2024-2025 Charity

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## FASFAA is dedicated to our community

The FASFAA charity for 2024-2025 is [Opportunity Community Ability \(OCA\)](#), an organization that champions the inclusion and empowerment of individuals with special needs and disabilities. OCA's mission is to create a world where everyone, regardless of their abilities, is valued and has the opportunity to thrive.

Some of the key things that FASFAA saw that inspired us to assist with donation to OCA is that they have teamwork that they will support, inspire and nurture the diversity of our families, colleagues and community to provide quality Participant care. Respect that they provide services and interactions with respect and dignity, while focusing on the individual's ability, not their disability. Innovation they will utilize a multi-disciplinary approach and emerging technology to individualize programming and to maximize ability. Passion OCA will do all that they do with passion. Everything from the way they train their staff, to the programs they run, to the facilities they use - OCA passion is to portray excellence.

As Galactic Guardians of a Whole New World with Care, Innovation, and Advocacy, we are proud to support OCA in breaking down barriers, creating pathways to independence, and offering hope to those who need it most. From employment training to recreational and community support programs, OCA transforms lives by fostering growth, inclusion, and opportunity. Each life touched by OCA represents the power of compassion and the importance of community.

FASFAA is proud to support OCA's incredible work, but we cannot do it alone. We need your help to make a difference. Whether through financial donations or contributions of time and resources, your support will directly impact the lives of individuals with disabilities and their families. Keep an eye on your FASFAA emails for opportunities to contribute throughout the year and at the annual conference. Together, we can be the guardians of hope, inclusion, and empowerment—and ensure that no one is left behind. Let's make this year one of extraordinary impact.

# Bonnie L. Pirkle Scholarship

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FASFAA established its own scholarship program as a commitment to help deserving students benefit from higher education.

The scholarship was named in memory of a long-time FASFAA member, Bonnie Long Pirkle, who exemplified the highest personal and professional qualities and who embodied the spirit of camaraderie of FASFAA members. Bonnie Pirkle grew up in South Carolina and Georgia in a very close-knit family. Her life in financial aid began when she accepted the position at Hall School of Nursing in Gainesville, Georgia, in 1970. There she rose from the Nursing Department's secretary to Director of Student Services.

Bonnie came to Florida in 1980, upon accepting the Assistant Director position at Daytona Beach Community College. She moved on to Director positions at Central Florida Community College and Seminole Community College. Then, she accepted a Marketing Manager position at Chase Education Finance Center. Throughout her career, Bonnie made time for additional professional activities. Her two favorite tasks were coordinating FASFAA training activities and planning financial aid conferences.

Many things come to mind when describing Bonnie – vivacious, perky, bubbly, caring, thoughtful, warm, welcoming, smiling, but perhaps the one which best describes her is special. To those who came into contact with her, she was special in every way and she made everyone around her feel special too. Bonnie is well-remembered at FASFAA conferences for making every event more fun; for making new people feel welcome and comfortable; for extending herself even at the expense of her own well-being; for her love of dancing; and for her role in arranging the most enjoya-

# FASFAA Elections

## FASFAA Elections: Rise of the Galactic Guardians

Citizens of the FASFAA Alliance,

The time has come to cast your vote and shape the future of our galaxy! The **FASFAA Elections** are now officially open and will remain in hyperdrive until **May 29th at 3:00 PM**. This is your call to duty—to select the next wave of *Galactic Guardians* who will lead our financial aid universe with honor, integrity, and unwavering dedication.

### Positions in this Stellar Election:

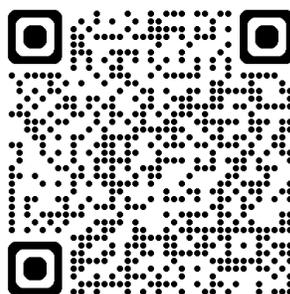
- **President-Elect** – The Commander-in-Chief in training, preparing to lead our federation into a bright new era.
- **Secretary** – The Keeper of Records, entrusted with the chronicles of our mission and the smooth operation of the fleet.
- **Treasurer-Elect** – The Guardian of Galactic Resources, preparing to navigate the stars of fiscal responsibility.
- **Regional Representatives** – The Voices of the Outer Sectors:
  - **Region I Representative**
  - **Region III Representative**
  - **Region IV Representative**

*Note: Only members from Regions I, III, or IV may vote for their respective Regional Representatives.*

Each of these roles is a vital command post in the FASFAA constellation, and your vote helps ensure that our mission to support Florida's financial aid community continues at lightspeed.

Your role as a FASFAA member is more powerful than ever. By voting, you join the ranks of guardians who believe in empowering students and lifting communities across our universe.

Together, we are **FASFAA—Federation for the Advancement of Stellar Financial Aid Alliances**.



# Photo Alert

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During the conference, photographs will be taken. By taking part in this conference your picture may be taken and be shown during the conference to all attending.

If you do not wish to be photographed please inform the person taking the photo.

Sincerely,

Traci Spagnoli-Rego & Kristina Chavers  
Conference Chair & Co Chair

# Thank You!

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## ***A Special Thank You to Our Friends of FASFAA, Conference Committee, Business Partners, presenters and volunteers!***

We would like to extend our heartfelt appreciation to the many individuals whose support and guidance were instrumental to the success of this year's conference.

To our all our numerous "Friends of FASFAA" — thank you for your mentorship, encouragement, and steady guidance throughout the planning process. Your contributions have left a lasting impact on this event and our community.

A special thank you to our Electronic Services Chairs, Tim Young and Justin Bohannon, for their outstanding work in setting up the rooms and managing all electronic components of the conference with professionalism and precision.

We're also especially grateful to Sara Kaufman, Anh Do, and Brenda M. Brown for their invaluable support throughout the planning process. From shaping the curriculum and connecting us with passionate, knowledgeable presenters to offering guidance and even a much-needed sense of humor—you each brought unique strengths that helped make this conference a success.

To all of our incredible presenters—thank you. Your time, expertise, and commitment to sharing knowledge are the backbone of this conference. Without you, none of this would be possible.

We also extend a sincere thank you to all of our amazing volunteers. Whether you were moderating sessions, greeting attendees, assisting with registration, supporting the charity table, or helping with local arrangements and the hospitality suite—your efforts did not go unnoticed. This conference was made stronger because of your dedication and willingness to pitch in wherever needed.

A heartfelt thank you to our Conference Committee for your many long hours, countless asks, and your unwavering commitment to excellence. You went above and beyond in every way, and this event is a reflection of your hard work and dedication.

To our Business Partners—thank you for your many sacrifices, ongoing support, and deep commitment to the association and to higher education. Your partnership and passion for our shared mission do not go unnoticed. You are truly amazing people, and we are so grateful to have you as part of the FASFAA family.

Lastly, to our Past FASFAA Presidents — thank you for the wisdom and direction you continue to provide. Your leadership has helped shape FASFAA into what it is today and continues to inspire future generations of financial aid professionals.

# Business Partners



# **All Hand on Deck FASFAA Annual 2025-2026 Conference**

Hello FASFAA Friends,

I am very excited and honored to begin my term as 2025-2026 President and have the opportunity to serve such an amazing crew. Together we continue to find ourselves in a period full of challenge and change in the world of financial aid. Yet, I truly believe that FASFAA can be a lifeboat as we navigate these uncertain waters.

This upcoming year, we will focus on providing a variety of training opportunities and resources to help each of us prepare to meet these challenges effectively.

I encourage all of you to be engaged with the organization. Participate in our events, connect with fellow members, and volunteer.

Thank you for your continued commitment to the profession and to FASFAA. I look forward to the year ahead, but it will need all hands on deck!

I invite you to save the date for next year's conference and stay tuned for information about other events throughout the year as well.

Thank you,  
Egan Hanson  
2025-2026 President



Daytona Beach, FL









