SWASFAA & TASFAA Fall Conference Sessions Summaries

☐ **NASFAA General Session**

NASFAA CEO and President Justin Draeger and National Chair Helen Faith will be at the conference to present a NASFAA update, answer questions, and provide breakout sessions.

☐ **Department of Education General Session**

Representatives from the Department of Education will present a federal update.

☐ **Texas Higher Education Coordinating Board Update**

Representatives from the THECB will present a state update.

☐ **Adventure is out there - Building a community driven outreach program to develop FA literacy**

Describe the establishment of a community driven outreach program at TAMUCC. How this role has assisted in driving enrollment by creating informed students through services such as educating on general FA concepts, creating a "line of responsibility" for administrators in order to effectively guide students through the financial side of the enrollment process. In short, looking at how community driven outreach at TAMUCC in partnership with our admissions office has spurred increased enrollment, and served both current and incoming students in understanding financial aid and helped students make the right decision for their educational future. In addition, the influences from the Toyota Production system and Lean Six sigma in establishing community-driven outreach and facilitating a smooth process for prospective and incoming students.

☐ **Advocacy 101 - Yes, you too can Advocate**

Focusing on the basics of Advocacy, conversations during this session will introduce you to advocacy. Participants will learn who can advocate, and how the process will work. The presentation will show where and how advocacy fits into the overall process of policy formulation, legislation, and then regulation. Participants are encouraged to come with advocacy questions to discuss with the panelist and session participants. This session is to teach participants about advocacy, and how this impacts the regulations aid officers follow. We will cover Negotiated Rule Making, Advocacy vs. Lobbying, and how to actually lobby. I have been a registered lobbyist and will share experiences from working with legislators on the hill.

☐ All for One Stop…One Stop for all! Lessons Learned by the Financial Aid Office During a One Stop Implementation

Leadership from Scholarships & Financial Aid and Aggie One Stop share best practices, advice and lessons learned during the implementation of Texas A&M University's first integrated enrollment services office. Implementing a one stop involves collaborative planning, effective change management, and an open mind. The presenters will share the considerations unique to the financial aid office when adapting to the one stop model.

☐ Ask THECB

Ask THECB will be an opportunity to engage the audience with answers they need on certain topics from the financial aid community as well as provide some general updates to state financial aid programs.

☐ Averting Danger: Combatting Fraud in Higher Education, Financial Aid, and Student Credit

We are witnessing a disturbing surge in fraudulent activities in higher education and financial aid. Financial aid administrators have a fiduciary responsibility to report suspected fraud. The objectives of this session are to raise awareness of the startling sophistication of fraud, discuss credit industry mitigants, and campus-wide best practices for deterrence. Just as Title IV administration is a campus-wide initiative, so is the detection and reporting of fraud. The session will highlight an integrated strategy for fraud prevention that includes multiple campus offices as well as external partners such as OIG, credit agencies and lenders. Attendees will gain an understanding of different types of fraud and the methods used by fraudsters, emergence

of synthetic fraud that involves creating a new identity by combining real and fake information, latest technologies and strategies used to detect and prevent fraud. Finally, the session will also provide a forum for networking and knowledge sharing among industry professionals and subject matter experts. Join us for this informative and engaging session on combating fraud.

☐ Birds of a Feather – Software Providers

This session will bring together institutions on different software systems (i.e. Banner, Colleague, etc.) to discuss system changes, challenges, and best practices. Representatives from some software providers will be available for Q&A.

☐ Building on our momentum- Why aren't we booming

This presentation will cover the steps taken by the Louisiana Community and Technical College System to develop a Strategic Enrollment Management policy. The presentation will provide a brief history of strategic enrollment management, define enrollment management, how to develop an enrollment management plan and why financial aid matters.

☐ The Changing Landscape of Professional Judgment

The Department of Education has recently implemented some new requirements for schools regarding the administration of Professional Judgment (PJ). In this session, we will discuss those updates and ways to make the PJ process more manageable and less intimidating. The session will focus on recent changes to the process, implementing PJ, what is allowed to be adjusted (and what isn't), and the required documents that can be collected from student applicants to document your decision. This session is designed to be interactive, and we will share examples of best practices and industry standards and ask attendees to share their ideas as well.

☐ Charting to a Better Destination

We will take a deep dive into the underlying purposes and goals associated with awarding scholarships. This will include exploring techniques on tracking the effectiveness of awards, projecting long-term costs and benefits, evaluating renewal strategies and considering options through which you can encourage behavior outcomes and improvements from your students. This will be part lecture on scholarship fundamentals and strategies, coupled with open

exchanges of creative best practices being used by our numerous institutions. Participants should walk away with a broader vision of why scholarships are important and a better understanding of how to use them strategically.

☐ Developing Financial Wellness team in the Post-Pandemic Era

The pandemic we faced radically changed our world. Not only have we suffered changes on a personal level (losses, state of mind, plans for the future…) but on a higher ed level there has been an unparalleled digital transformation, considerably increasing remote working for a large number of employees. Developing and maintaining a team in what some call "the new normal" is challenging. Let's discuss how to build and maintain an impactful, resourceful, and student-centered Financial Wellness team.

☐ Developing Your Team's Leadership Culture

This session provides concepts to assist your office in developing leaders. From the intern, the work-study, the front level staff member to the Director - we all want to work for a team where each individual is maximizing their potential to be a leader and work together towards the common goal. From "That's not my job." to "I have something to offer here." Let's get rid of the finger pointing and get more teammates to raise their hands!

☐ Emotional Intelligence: managing our relationships personally and professionally

Emotional intelligence, often called EQ, is your ability to understand your emotions IN THE MOMENT and to use that information to manage yourself and your relationships effectively. Emotional intelligence can positively affect every relationship from personal to professional. Learn the foundations of social and emotional intelligence and begin to practice strategies that strengthen your ability to understand your emotions and the emotions of those around you.

☐ FAAC Exam - The importance and benefits

A Panel discussion of the importance of taking and passing the FAAC exam and the benefits that come with the designation.

☐ Flying with All Four Engines

We will be having an open discussion about the time investment and benefits that come with professional volunteer engagement. I will be sharing examples of how my involvement contributing to on-campus committee work, multiple state and regional associations plus NASFAA volunteerism has yielded direct benefits for me professionally and for my institutions. We will review opportunities for involvement at the various levels of professional associations, address questions of time and money commitments associated with engagement and discuss a number of the ways it can positively impact your life.

☐ Hanging on Through the Turbulence

Tips and suggestions to ease the turmoil of Financial Aid by using work-life balance techniques.

☐ Holistic Approach to Serving Former Foster Care Youth through Fostering Ram Success

This presentation will address the challenges and opportunities of assisting former foster care youth and what ASU is doing to through their Fostering Ram Success program to provide a holistic approach to recruiting, retaining and graduating this at-risk student population. Included will be information about the various educational funding opportunities for former foster care youth to remove the financial barriers and challenges to determine eligibility as well as coordination needed to administer these funds. In addition, you will learn about unique psycho-social and academic challenges these student face and how ASU is seeking to address them through the Fostering Ram Success program.

☐ The Key to Connect - Social Media in Higher Education

This session will discuss how powerful the presence of social media has been with today's generation, and how we can benefit from the same connection in higher education. In order to reach our audience/customers, we have to be where they are outside of traditional communication. The University of Houston - Downtown's Financial Aid Office will share how powerful of an impact social media has had for their office and the overall Enrollment Management Department. The panel will also discuss how it has improved the engagement with their customers and the student program that was implemented to give virtual visitors a

glimpse of what it is like to attend UHD. Helpful resources will also be provided that any institution or organization can use to benefit from the different social media platforms and user-friendly tools online.

☐ May the loans be with your students

Loan repayment has been on three years hiatus. Now it is back. Are your Jedi loan warriors ready to help your students with loan repayment again? What should your school be doing to make sure your default rate does not go to the dark side? This session will be going over loan repayment and default prevention tools Hopefully your school does not see 40% higher default rates in two years.

☐ Navigating FAFSA Simplification

The Student Aid Index and changes to federal methodology are upon us! FAFSA simplification is in full swing with the updated 24-25 FAFSA, FAFSA Processing System (FPS), and IRS Direct Data Exchange (DDX) expected to launch by the end of this year. Join this session to hear from Texas A&M University - College Station on what they are expecting in terms of changes in Pell Grant eligibility and funding as well as how they have prepared and are preparing for the many changes that FAFSA Simplification requires.

☐ No Money, No Problem: A Community College Approach to Enrollment Management

Community colleges, as example, have operated under the philosophy of "if you build it, they will come" for many years (Bucher, 2010). In more recent years, community colleges have become more intentional in their enrollment management practices. This presentation will share free or inexpensive strategies any college can implement to increase enrollment at their colleges.

☐ Partnerships in Emergency Assistance - Helping Students Move Through Hardship and Toward Graduation

Coordinated advocacy, retention, and emergency services help students overcome barriers to their success and help clear their paths to continue their education and persist toward

graduation. Barriers to student success often include food insecurity, housing insecurity, inability to access needed technology or course materials, and other forms of financial hardship. As institutions work to strengthen case management programs and services, financial aid offices must be represented to ensure a holistic approach to helping students move through hardship and toward graduation. The constellation of wrap-around student support programs is strongest when robust partnerships exist between student affairs, student success, case management, and enrollment management. This session will discuss forming and maintaining partnerships to address student basic needs, responding to student emergencies in consideration of financial aid implications, and assessing the success of emergency assistance programs.

☐ Piloting through Conflict Review

Conflict resolution has become a key process within the financial aid community. I will discuss the growing pains and solutions my campus went through to ensure the students continue to be awarded with the best available funding as well as maintaining compliance. I will show the auto form that pulls data from TJC's system, Banner, to assist in determining if the student has a conflict that must be resolved. All financial aid students are conflicted prior to being awarded.

☐ Promising Practices: A Service Structure to Promote Student Access

As demographics of college-aged students are projected to continue to shift nationally, it is our duty to adjust how we serve students in relevant and modern ways, and with a student-first approach. This session will share how SMU has realigned their organization to promote a student financial service structure that does just that. The learning outcomes for this session are: 1. identification of promising practices that support diverse student populations, 2. tools to promote staff retention, 3. change management strategies.

☐ Resources for Resources

I have wondered how do you keep up with the ever changing environment of financial aid. After 15 years in the industry and many mentors and training sessions, I have come to the understanding that it is about know what resources you have at your disposal and how to use them. From FSA's student aid website to NASFAA's Ask Regs, we will share some pro tips on how

to get the information your office needs to provide excellent customer and maintain compliance.

☐ Sector Meetings – School Types

This session will bring together schools from each sector (i.e. public 2-year, public 4-year, private 4-year, grad/professional, proprietary & clock hour) to discuss the challenges facing your students, best practices, and networking/support opportunities.

☐ Succession Planning, Retention, and Diversity: A Holistic Approach to Creating a Synergistic Financial Aid Office

Points to be discussed: * Hiring and training for succession planning and staff retention; *Creating a positive culture within the financial aid office; *Creating a diverse workplace by reducing barriers to hiring through committees - selection based on qualifications to reduce bias in the selection process; *Incorporating customer service training and effective communication among FA staff members within the financial aid office (understanding internal customers, as well as, external customers); *Expanding professional development training and incorporating time management/organization,   adaptability/willingness to learn/flexibility, teamwork, leadership, stress management, and self-awareness; *Utilizing Clifton Strength's Finders to utilize staff strengths on team and to achieve a synergistic approach through team building.

☐ Supporting Students Transferring from a 2 year to 4 year Institution

This session will focus on helping Financial Aid Administrators act as leaders in their communities and advocate for ways to make the transfer process more accessible for students. Also networking and creating support teams among FA Administrators to help students succeed.

☐ Training for New Frontline Financial Aid Reps

Training model for new frontline employees in a One Stop or Financial Aid role. How to build out a training schedule, who to bring in for training/engaging current staff, training remote employees, training student workers, training resources, training styles/modes, setting them up for success, building confidence, communication prior to starting/during hiring.

☐ Transforming a Distressed Department Strategies for Success in Uncharted Territory

Parker University's financial aid department faced significant distress, including student complaints, inefficient processing of student financial aid, and compliance issues. This panel discussion will shed light on Parker University's successful strategies for transforming the department into an effective, student-centered entity. Our panelists will share their insights, best practices, and success stories, providing attendees with practical guidance and inspiration to revitalize and reposition their own financial aid departments. Join us to gain valuable insights and actionable steps to navigate the challenges of uncharted territory and transform your distressed financial aid department into a beacon of support for student success.

☐ Understanding Amended Tax Returns

Review of the basic logic of an amended tax return and the process to correct FAFSA verifiable tax data with supporting tax documentation.

☐ Where Financial Aid meets Student Affairs

A new perspective on Financial Aid - As modern technology helps us automate a lot of initial financial aid processes, I have begun looking at my role as a financial aid administrator from a more student-centered perspective. I have worked diligently to network with my law school's Student Affairs Office (SAO), to ensure a holistic approach to financial aid counseling. We will talk about how we have worked together in tackling the grey area, where financial aid meets student affairs.

☐ Where Have All the Staff Members Gone?

Coming out of COVID many of us have experienced loss of staff. This interactive session will discuss some of the realities of today's workforce and talk about some strategies to help us find and retain good talent. Attendees will also be given an opportunity to share ideas you have developed.