SOUTH CAROLINA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS 2023 Annual Conference



October 8-11, 2023 | Myrtle Beach, SC



HELLO SCASFAA!

On behalf of myself and the Executive Board, welcome to the Annual SCASFAA Conference! Jennifer Williams, along with her Conference Committee, have put together a truly Spooktacular SCASFAA event and we are so excited to have you here!

I will admit that being the Halloween-obsessed person



that I am, my theme of "don't be spooked by financial aid, find your home in SCASFAA" was decided upon well before we knew how truly scary FAFSA Simplification (and really, the delayed FAFSA) would be. And while there are many aspects of our profession that can send chills down your spine, you're not trapped battling the ghouls alone.

Speaking of not being alone: I want to give tremendous thanks to our sponsors. Their support ensures we can provide excellent professional development each year. Please visit the vendor area often during the conference to learn about key products and services they can provide to your institutions and your students.

Next, I wish to thank the Executive Board and all volunteers serving on committees; so much work goes on behind the scenes keeping the Association running, and without their leadership, support, and willingness to give back to the Association, we would not be where we are today.

And lastly, I wish to thank our presenters and special guests, for their willingness to provide their expertise. I hope you take the opportunity to grow professionally, network with our wonderful sponsors, and calm your fears as you find your place among your colleagues.

Zachary "TAZ" Christian SCASFAA President #SpooktacularSCASFAA



2023-2024 Program Chair

Hello SCASFAA!

I can't tell you how excited I am to serve as President Zach's conference chair this year. When we started talking about this conference over a year ago, I was so excited about his theme and all the fun ways we could incorporate that into the conference. I hope that you enjoy the decorations, activities, amazing agenda, and most of all the opportunity to network with your colleagues and our fantastic sponsors. We'll spend the next few days celebrating SCASFAA and the connections we've made through this association and probably spend a little time commiserating over the coming challenges that face us. I have no doubt that we will face them and overcome!

I'd like to give a huge shout-out to this year's conference committee! You can see all the members of the committee on the back of your pocket agenda. This conference would not be possible without the tireless effort of each of these members. Each member of the conference committee will be wearing an Orange SCASFAA shirt on Sunday and will have a committee member ribbon on their name badge. If you need anything during the conference, please do not hesitate to ask one of the committee members!

Thank you for being here this week! I look forward to spending the next few days "finding our home in SCASFAA"!

Jennifer Williams 2023-24 Conference Chair #SpooktacularSCASFAA





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October 6, 2023

Ladies and gentlemen, esteemed guests, and fellow advocates for the well-being of our youth, thank you for your support of Palmetto Place Children and Youth Services. I have my friends here to share a remarkable story of resilience, hope, and triumph. It is a story that embodies the mission and impact of Palmetto Place, a sanctuary for teenagers who have been abandoned, neglected, or find themselves facing the harsh reality of homelessness. Imagine, if you will, a world where dreams are shattered, where the innocence of childhood is stolen, and where the future seems bleak. This is the reality that many of the youth who enter Palmetto Place face. But within the walls of Palmetto Place, a transformation takes place.

Most of the youth who seek refuge at Palmetto Place arrive during their junior or senior year of high school. They come not only seeking shelter but also desperately yearning for stability, guidance, and a chance to reclaim their dreams. What sets Palmetto Place apart is our unwavering commitment to providing not just emergency shelter but also a transformative transitional living program. Imagine the fear and uncertainty our youth face as they navigate the challenges of homelessness. Education is at the core of Palmetto Place's philosophy. We firmly believe that knowledge is the key to unlocking a brighter future. We currently have a 100% rate of youth who are employed or are full time student. While some of us choose to jump into the work force, many of us attend technical colleges, where they can gain valuable skills for stable employment, others dare to dream even bigger. Last year, we witnessed an extraordinary milestone in our journey at Palmetto Place. Three remarkable young individuals, who had entered the program alongside their siblings, not only maintained part-time jobs while at Palmetto Place but also pursued various certifications in their chosen fields.

For one youth in particular, Mark, he came to us during this junior year. Not long after, we had two of his siblings in our home. Palmetto Place supported 3 siblings who found themselves unsheltered trying to finish high school. Mark's dedication and hard work paid off when he was awarded scholarships for his exceptional achievements. His scholarships were not just tokens of recognition; it was the keys that unlocked the doors to a four-year college education. We celebrated Mark with each acceptance letter from colleges and each award received from his High School, we wanted to let him know there was still hope in this world, keep pushing, keep going. With a full ride scholarships in hand, he embarked on a new chapter of his life, attending prestigious universities within our state. He maintained a part-time jobs, balanced his studies

with real-world experience. He received certifications, expanding his knowledge and enhancing his resumes. And, most importantly, he never lost sight of our dreams.

Palmetto Place supports youth in not only overcome the adversities of their past but have also shattered the limitations that society often places on our youth. We have proven that with the right support, determination, and unwavering belief in our youth, anything is possible. Our stories serve as a testament to the transformative power of Palmetto Place and the unwavering dedication of its staff.

Palmetto Place is not just an emergency shelter; it is a beacon of hope, a sanctuary that nurtures dreams and empowers young individuals to rise above their circumstances. As the community continue to support Palmetto Place and its mission, let us remember Mark's story. Let us be inspired by his resilience, his determination, and his unwavering belief in the power of education. Together, we can create a world where no dream is too big and no obstacle is insurmountable. Thank you.

Sincerely,

Alam Carubalto

Shawn Caraballo Executive Director



Jennifer Williams, Chair - Clemson University ZACHARY CHRISTIAN, EX-OFFICIO - SC TUITION GRANTS COMMISSION DESTRA CAPERS - SC STUDENT LOAN CORPORATION Kira Demery - SC Tuition Grants Commission Sarah Dowd - Trident Technical College RACHEL ELKINS - TRI-COUNTY TECHNICAL COLLEGE HOLLY GILLAM - UNIVERSITY OF SOUTH CAROLINA Melanie Gillespie - Tri-County Technical College TOSH GREATHREE - COLUMBIA COLLEGE **REGINA HAILEY - USC TRIO PROGRAMS** KATIE HARRISON - SC TUITION GRANTS COMMISSION Samantha Hicks - Coastal Carolina University Jessie Kiser - Clemson University JANEE KNIPPENBURG - PNC BANK **BEVERLY LOWRANCE - CONVERSE UNIVERSITY** ELIZABETH MILAM - CLEMSON UNIVERSITY JANELLE PALOMO - CLEMSON UNIVERSITY Kyle Phillips - Clemson University Gena Miles - SC Tuition Grants Commission DANA QUATTLEBAUM - BENEDICT COLLEGE Sara St. Pierre - York Technical College MICHELLE UPCHURCH - LIMESTONE COLLEGE Kyle Wade - Spartanburg Methodist College

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2023-2024 Special Guests



Brad Barnett, MS, AFC[®], CPFM, FAAC[®] is an

Accredited Financial Counselor, Certified Personal Financial Manager, and Certified Financial Aid Administrator who works as the Associate Vice President for Access and Enrollment Management/Director of Financial Aid & Scholarships at James Madison University. Closing in on three decades of experience in the financial aid profession, Brad has been active in state, regional, and national financial aid associations as a presenter, committee member/chair, and elected officer.

A past president of VASFAA and SASFAA, he has also served NASFAA on the Board of Directors, Financial Affairs Committee, as Treasurer, as Conference Chair, as a Standards of Excellence (SOE) Reviewer, and as a SOE Assessment Leader. This culminated with his service as the 2022-23 NASFAA National Chair.



Brad received the VAFSAA Excellence Award, VASFAA Life Membership Award, SASFAA Distinguished Service Award, NASFAA Regional Leadership Award, and NASFAA Allan W. Purdy Distinguished Service Award. In addition to these activities, he teaches personal finance courses (on-line and in person) at JMU and provides financial counseling services on a professional basis outside of his role with JMU.

Brad and his wife, Sara, have two sons. The oldest graduated from the University of Mary Washington and the youngest graduated from James Madison University. This has given him the unique perspective of going through the "college process" as a parent, as well as an administrator.

Dana Kelly has served the financial aid community for over 30

years. She currently works as the vice president of professional development and institutional compliance for the National Association of Student Financial Aid Administrators (NASFAA). In this role she oversees all products and services assigned to the training and regulatory assistance and certification and credentialing departments, supervises DCbased and remote training staff, manages the annual Leadership & Legislative Conference & Expo, and develops session content for NASFAA's national conference. As a member of NASFAA's executive team, she is instrumental in ensuring NASFAA is working toward the vision, mission, and goals established by NASFAA's Board of Directors. Prior to working at NASFAA, she held positions at Nelnet Diversified Solutions as a national trainer, at Nelnet as a regional director, and at



High Point University as the director of student financial planning. She holds a Bachelor of Science in justice and policy studies from Guilford College, a master's degree from University of Phoenix in organizational management, and master's in public administration from the University of North Carolina at Greensboro.



Heather H. Boutell, M.Ed is the Director of Financial Aid at Vanderbilt School of Medicine in

Nashville, TN. Heather has worked in the field of financial aid for 32 years, spending the last 4 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 KASFAA in 2004-2005 and President of the SASFAA in 2008-2009. She has served on the NASFAA Board of Directors as a regional Past President, as one of the 6 elected roles of Rep-at-Large, and as a Commission Director.

Most importantly, though, Heather is married to Steve and has two sons – Jonah and Ben, who both live in Chicago. They have an orange cat, Crouton. Heather also loves reality competition TV shows – talk to her about Survivor, Amazing Race, Big Brother, or Dancing with the Stars! She is also working on her Ed.D. (about 2/3 finished) in Learning Organizations and Strategic Change at Lipscomb University.





Andrew Quinn has worked in higher

education for about 12 years in a private 4-year, public 4-year, and now in a public 2-year community college. He is currently the Director of Financial Aid at Brightpoint Community College in the greater Richmond, Virginia region and is serving as the 2023-24 President-Elect on the board of the Virginia Association of Student Financial Aid Administrators. Outside of work he enjoys spending time with his puppy Arrow, focusing on health/fitness, trying new restaurants, traveling, and seeing live music!



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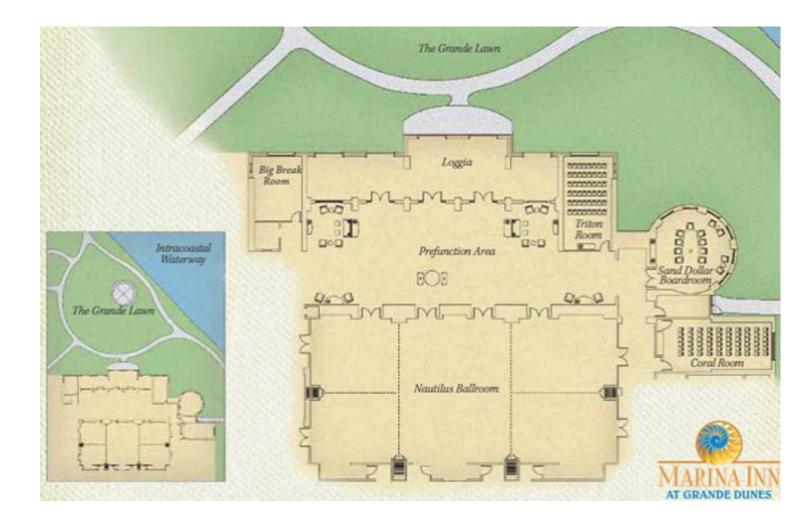


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Conference Map





Conference Agenda

Sunday, October 8	General and Concurrent Sessions	Location
9am – 12pm	Pre-Con Professional Development (Additional Registration Req)	Nautilus Ballroom A-C
10am – 5pm	Registration Open	
12pm – 1:30pm	Lunch for Pre-Con Attendees, Board Members, Conference Committee, Sponsors	Loggia Area
2:30pm – 3:45pm	Opening Business Meeting, FAFSA Simplification with QA, Dana Kelly - NASFAA	Nautilus Ballroom A-C
4pm – 5pm	Student Eligibility Basics, Dana Kelly – NASFAA	Nautilus Ballroom A-C
	Hitting the Reset Button, Becky Davis – Ascendium	Nautilus Ballroom D
	PJ Policy Changes, JW Kellam – Converse College	Nautilus Ballroom E
Session Description	 Student Eligibility Basics: This session provides an overview of general student eligibility criteria and documentation requirements, acquaints participants with the role of the Central Processing System (CPS), the student eligibility database matches, and the National Student Loan Data System (NSLDS), as well as how certain educational programs affect student eligibility. Hitting the Reset Button: Overbooked calendars, competing deadlines, and unexpected challenges are normal facets of life. But what do you do when those facets become overwhelming and distressing? When life takes a turn from stability and bliss to turbulent waters, it's time to stop and change directions. You may need to hit the reset button to reclaim your peace. During this enlightening session, I'll share simple lifestyle changes to find your inner calm and live a more fulfilled life. PJ Policy Changes: Professional judgment (PJ) is sometimes viewed as one of the more challenging aspects of Title IV program administration. There are both explicit and implicit guidelines that must be followed in relation to other aspects of Title IV federal student aid administration. This session will cover what PJ is, the statutory authority of the FA Administrator, and best practices. 	
<u>5:45-6:00pm</u>	First Time Attendee Meet and Greet	Nautilus Ballroom
6pm – 8pm	President's Reception	Nautilus Ballroom
8:30pm – 11pm	Hospitality Suite Open	

Monday, October 9		
7am -8:15am	Breakfast	Pre-function Area
8:30am-9:45am	Dependency Status Changes/Issues – Elizabeth Milam – Clemson University, Shawndelea Hudson – Piedmont Technical College, Ashley Pickett – Benedict College	Nautilus Ballroom A-C
Session Description	In this general session, administrators from three different sectors will review the criteria for being independent, examine Unusual Circumstances and new requirements, and explore best practices for dependency overrides.	
10am – 11am	 Banner – Rachel Elkins, Tri-County Technical College Peoplesoft – Allison Sullivan and Nicole Pare – FA Solutions Colleague – Kyle Wade, Spartanburg Methodist 	Nautilus Ballroom A-C Nautilus Ballroom D Nautilus Ballroom E
Session Description	College Banner Tips and Tricks – Beginner to Intermediate: Whether you have been living in Banner Land for a while or are new to this wonderful place, I hope to have tidbits for each of you to make your experience in Banner just a little more user-friendly.	
	Powerfaids: Presenting information on 2024-2025 regulation changes and how this will be seen in the system. Reporting FWS to COD and how this can be done right out of the system. Timeline of the Powerfaids Cloud version and giving some of the best tips, tricks, and best practices. All things Powerfaids.	
	Colleague: C olleague for Colleagues: Explore Colleague with some of your favorite colleagues. See what we did there?	
11:15am – 12:30pm	NASFAA/SASFAA Update, Dana Kelly – NASFAA, Brad Barnett – NASFAA, Carolyn Sparks – SASFAA	Nautilus Ballroom A-C
Session Description	Please ioin us for an update from NASFAA and SASFAA Representatives : Brad Barnett, NASFAA Past National Chair, and Dana Kelly, NASFAA Vice President of Professional Development and Institutional Compliance will provide an update on association activities. professional development and training opportunities, and the volunteer and public policy work of the association. Learn how you can get involved.	
	Carolyn Sparks, SASFAA Treasurer, will provide the SASFAA update.	
12:30pm – 2:30pm	Lunch Groups (off site – covered by SCASFAA)	

2:45pm - 3:45pm	Better FAFSA – Practical Guidance for Assisting Students in Completing the New FAFSA, Katie Harrison - SCTCG, Gerrick Hampton - CHE, Destra Capers - SCSLC, Nicole Burton – Trident Technical College	Nautilus Ballroom A-C
<u>Session Description</u>	 Better FAFSA - Practical Guidance for Assisting Students in Completing the New FAFSA : Nothing seems to haunt the financial aid and college access communities more than the upcoming changes to the FAFSA resulting from the FAFSA Simplification and FUTURE Acts. At times, there have been more questions than answers, and we have dealt with some unexpected surprises and delays along the way. But never fear Navigating the New FAFSA doesn't have to be a spooky experience! In this session, you will hear from your colleagues who represented South Carolina at the National College Attainment Network (NCAN) Train-the-Trainer summit as they provide guidance on handling common scenarios likely to be experienced by students and parents as they complete the new FAFSA. 	
4pm – 5pm	 Best Practices in Aid Offers, Dana Kelly –NASFAA Proactive Payment Planning: Reducing Enrollment Cancellations, Don't get Ghosted! Andrew Quinn – Brightpoint Community College AI in Financial Aid, Samantha Hicks – Coastal Carolina University 	Nautilus Ballroom A-C Nautilus Ballroom D Nautilus Ballroom E
	 Best Practices in Aid offers have been in the news and the subject of discussion at NASFAA and in Congress. This session looks at aid offers and best practices to ensure your students fully understand the aid offers they receive. We will also discuss the College Cost Transparency Initiative recently launched. Reducing Enrollment Cancellations: In this session, we will discuss how Brightpoint Community College implemented an in-house contact center for financial aid and student accounts related questions. This allowed for proactive outreach to students to help them confirm their payment plans through a piloted and personal financial check in initiative. This helped to greatly reduce the number of students who were dropped for non-payment during the enrollment cancellation process. Artificial intelligence (AI): is the new buzzword in higher education. Some folks view Al as Hocus Pocus, a fad, or even a threat. This session will educate participants on what artificial intelligence even is, the opportunities and threats that it presents, how students are already using it, and how it can become a 	

5:30pm -7:30pm 9pm – 11pm Tuesday, October 10 7:30am – 8:45am	practical "magic" used as a tool in the financial aid office. This session will look at ChatGPT, Google Bard, Canva, and other practical examples of AI-assisted tools that can be used in financial aid. Sponsor Reception (all attendees invited) Hospitality Suite Open Breakfast	Grande Lawn Pre-function Area
9am – 10am	SCOTUS Decision Panel Discussion, Joey Derrick – USC-Columbia, Heather Boutell – Vanderbilt University School of Medicine, Sarah Dowd – Trident Technical College, Tangar Young – South Carolina State University, JW Kellam – Converse University	Nautilus Ballroom A-C
	 Counseling Best Practices, 'Lola Kennedy and Tosh Greathree, Columbia College SQL Basics, Zachary Christian - SCTGC and Jennifer Williams – Clemson University 	Nautilus Ballroom D Nautilus Ballroom E
<u>Session Description</u>	 SCOTUS Decision Panel Discussion: "In a sweeping ruling, the US Supreme Court ruled in favor of the Students for Fair Admissions (SFAA) in their lawsuits against Harvard University and the University of North Carolina – Chapell Hill. The decision specifically impacts the use of race in college admissions decisions, but the impact will most certainly be felt beyond the admissions process. Join us for a panel discussion of these possible impacts, and preparations that schools are taking in response." Counselor's Best Practices: Gain in sight on best practices to navigate the requirements of federal aid while maintaining work/life balance. We will explore best practices from a director's perspective and a counselor's perspective that will allow your office to operate effectively and effectively. SQL Basics- Have you ever wondered what dark magic is used to get the reports you use daily? Do you currently create your own reports but want a better understanding of how to do so? Have you ever heard the term "SQL" (said like sequel) and wondered what exactly that is? Or do you just want to reinforce your understanding of SQL? If you 	

	answered 'YES' to any of the above, grab your laptop and join us for an interactive session on SQL and Query writing!	
10:15am – 11:15am	2024-25 Verification Changes, Elizabeth Milam – Clemson University	Nautilus Ballroom A-C
	Web Accessibility Issues, Kyle Phillips – Clemson University	Nautilus Ballroom D
	 Can you Afford (\$) To Work in Financial Aid?, Brad Barnett – NASFAA Past Chair 	Nautilus Ballroom E
Session Description	 Verification Changes: Join this session to review current Verification procedures and start thinking about how FAFSA Simplification will change Verification for 2024-25. Web Accessibility: At some point in your forties, you wake up and can no longer read the emails on your phone. You hold the phone away from your face, and the blur remains. Your mind does not 	
	feel ready for bifocals because you are not that old. There must be a logical excuse. You are preparing to fight the battle with age, but there is no use.	
	That is the story some of us will walk through in our lives, but it is not everyone's story. Some of us are born with vision or hearing limitations that require digital-assisted technology from the time we start school. For others, using a mouse may not be an option. These examples illustrate just a couple of challenges our users face when navigating the digital world, we are building. We must take time to include everyone in this new age and realize that inclusion belongs to them, too.	
	Can You Afford (\$) To Work in Financial Aid? You love financial aid and the ability to positively impact the lives of the students you serve, but you wonder if you can afford to make a career out of it. Positioning yourself to earn more money in the long term is important, but often overlooked are ways you can be more effective with the money you're earning today. This session will help attendees identify how to get the most out of your money.	
11:30am – 1:30pm	Awards and Recognition Lunch	Nautilus Ballroom
1:45pm – 2:45pm	Top Ask Regs, Dana Kelly – NASFAA NASFAA's AskRegs database has over 4000 questions posed by your colleages from across the country. Join Dana Kelly for a review of some of the most asked questions and their answers NASFAA has received.	Nautilus Ballroom
3pm – 4pm	Confidential Student Data: Protecting Your Students While Maintaining Compliance, Katie Harrison – SCTGC and Kenneth Cole – USC Lancaster	Nautilus Ballroom A-C

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	Trio Programs, DaWayne Nettles USC TRIO Assistant Director for the Upward Bound Program	Nautilus Ballroom D
	Managing Others, Heather Boutell – Vanderbilt University School of Medicine	Nautilus Ballroom E
Session Description	Confidential Student Data: Protecting Your Students While Maintaining Compliance: Do you know the difference between the data classification of the Student Aid Index (SAI) and certain data elements (like FTI) that are used to calculate it? Are you familiar with your institution's obligations under the Gramm-Leach-Bliley Act (GLBA)? How about the definition of "business associate" under the Health Insurance Portability and Accountability Act (HIPAA)? Do you know what is required by the State of South Carolina in the event of a security breach of confidential data?	
	If this all sounds scary, or if you're just not sure why this applies to you as an aid administrator, come to this session to learn more about how to implement some basic privacy and security safeguards to protect your students, and your organization, from harm.	
	TRIO programs around the country offer low-income and first-generation college students the personal attention, planning and information to manage their financial constraints, strengthen their academic skills, adjust to the campus environment and set goals that lead to graduation and responsible participation in society. TRIO provides information, services and support that help low-income and first-generation college students — those who are the first in their family to go to college — prepare for college and reach for their academic goals. In this session we will discuss the significance of TRIO Programs, highlighting programming available in the state of South Carolina and how to tap into TRIO Programs as a resource.	
	Managing others can sometimes be the hardest part of our jobs in higher education. This session will present seven common-sense secrets to managing productive people through the eyes of a sheep farmer! This session will allow attendees to interact, commiserate, and share ideas on how to lead. If you want greatness from your employees, you must give greatness yourself.	

4:15pm – 5:15pm	 Financial Aid Jeopardy, Kathleen Roebuck – Monogram 	Nautilus Ballroom A-C
	Dealing with Difficult Students, Melanie Gillespie – Tri-County Technical College	Nautilus Ballroom D
	Pensions, 403b's, IRA's, Roths Explaining The Options and Why You Need to Get in the Game, Brad Barnett – NASFAA Past Chair	Nautilus Ballroom E
Session Description	 Financial Aid Jeopardy Come join a fun and interactive way to test your financial aid knowledge and learn something new! Categories include: SCASFAA, FAFSA, Potpourri, Verification, Student Loans, and more. Join us in a game of Financial Aid Jeopardy where you will be split up in teams to see who takes home the win. Pensions, 403b's, IRA's, RothsExplaining The Options and Why You Need to Get in the Game We have our fair share of acronyms in financial aid, but we're not alone. When thinking about retirement you may have access to 403b's 401a's, 401k's, 457's, or even IRA's. Then there are traditional versions and Roth versions, and in some instances you may even have access to a pension. This session will discuss the importance of investing for your own retirement, as well as how many of these various accounts work. 	
5:15pm – 8pm	Night on your own	
8pm – 11pm	Networking Event	Nautilus Ballroom A-C
Wednesday, October 11		
7:45am – 8:30am	Breakfast	Pre-function Area
9am – 10:15am	Federal Update - Heather Boutell, Vanderbilt University School of Medicine	Nautilus Ballroom A-C
Session Description	Federal Update: Come hear information and updates about Title IV activities and initiatives from the Department of Education and Federal Student Aid. What do you need to know for 2023- 2024 and 2024-2025? David Bartnicki may not be with us,	

	but Heather will channel her inner Dave to provide you with what you need to know!	
10:15am – 11:30am	State Update	Nautilus Ballroom A-C
Session Description	Come to this session to make sure you are aware of important updates and information related to state aid programs. This session will include presentations by the SC Commission on Higher Education, SC Tuition Grants Commission, SC Technical College System, and SC Student Loan.	
11:30am – 12pm	Closing Business Meeting	Nautilus Ballroom A-C





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