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GASFAA

GEORGIA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

2021 ANNUAL CONFERENCE

• JUNE 9TH - JUNE 16TH, 2021 •



GASFAA.ORG

2021 CONFERENCE AGENDA

WEDNESDAY, JUNE 9TH, 2021

TIME

SESSION

8:45a-9:30

Opening Session and Business Meeting

9:40-10:50

How to Engage With Your Students Better Than TikTok

11:00-12:30p

Introduction to the 2020 Tax Forms and
Changes to the Tax Code

12:30-1:30

GASFAA 2021 Annual Conference Exhibit Hall

1:30-3:00

Federal Update

3:00-4:30

Amended Tax Returns and IRS Request Flag 07

2021 CONFERENCE AGENDA

THURSDAY, JUNE 10TH, 2021

TIME

SESSION

9:00a-10:30

State Programs FY 2022 Regulations and Procedures

10:40-12:00p

The College Aid Services Experience: How to Overcome Your Challenges and Make You Stronger!

10:40-12:00

Technical College System of Georgia Sector Meeting

12:00-1:30

GASFAA 2021 Annual Conference Exhibit Hall

1:30-3:00

How Different Types of Melt are Affecting Your Student Populations

1:30-3:00

SASFAA Update

3:00-4:30

Federal Work-Study

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2021 CONFERENCE AGENDA

FRIDAY, JUNE 11TH, 2021

TIME

SESSION

9:00a-10:30

State Program Overview for Public Safety, HERO, Georgia National Guard, Tuition Equalization Grant, REACH, GAFutures, and Postsecondary Functions

10:40-12:00p

Business Manners & Etiquette

12:00-1:00

GASFAA 2021 Annual Conference Exhibit Hall

1:00-2:00

Head of Household Deep Dive

2:15-3:30

Is Your Career Trajectory Where it Should Be?
How to Build Your 5-Year Plan Using Reasonable
Objectives

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2021 CONFERENCE AGENDA

MONDAY, JUNE 14TH, 2021

TIME

SESSION

9:00a-10:30

CHECS - Understanding the Student's Calculation Record: A Walkthrough of Each Section

10:40-12:00p

Financial Aid's Roadmap and Framework for Reversing FAFSA Declines

12:00-1:30

GASFAA 2021 Annual Conference Exhibit Hall

1:30-3:00

Challenging Verification Scenarios

3:15-4:30

Private Schools Sector Meeting

3:15-4:30

University System of Georgia Sector Meeting

3:15-5:00

Understanding Our Students

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2021 CONFERENCE AGENDA

TUESDAY, JUNE 15TH, 2021

TIME

SESSION

9:00a - 10:30

CHECS - Understanding and Creating Historical Snapshots: For Those New to CHECS or a Refresher

10:40 - 12:00p

Time Management for the Overworked and Overwhelmed

12:00 - 1:30

GASFAA 2021 Annual Conference Exhibit Hall

1:30 - 3:00

NASFAA Update and HEERF Reporting

3:15 - 5:00

Changing the Conversation

2021 CONFERENCE AGENDA

WEDNESDAY, JUNE 16TH, 2021

TIME

SESSION

9:00a-10:30

NASFAA Professional Judgment Best Practices

10:40-12:00p

Getting Your House in Order: How to Prepare for an A133
Audit or Program Review

10:40-12:00

Future-Proofing College Financial Aid

12:00-1:00

Lunch

1:00-2:00

Open Forum on Taxes and Need Analysis

2:15-3:15

Checkpoints and Academically Ineligible - Learn about
New Tracking of Academically Ineligible Status with
Invoices and Year-End Reconciliation

3:30-5:00

Closing Session

SESSION INFORMATION

WEDNESDAY, JUNE 9TH, 2021

How to Engage with Your Students Better Than TikTok	Chansone Durden	Earnest
Introduction to 2020 Tax Forms and Changes to Tax Code and Amended Tax Returns and IRS Request Flag 07	Robert Weinerman	Iron Bridge Resources

THURSDAY, JUNE 10TH, 2021

State Programs Regulations and Procedures	Pennie Strong	Georgia Student Finance Commission
The CAS Experience: How to Overcome Your Challenges and Make You Stronger!	Brenda Brown and Lakisha Sanders	College Aid Services
A Discussion with Webber International University on Missed Opportunities and Abandoned Ambitions: Combating Student Melt	Shannon Jones	Inceptia
	Lee Ann Avirett	Webber International University
SASFAA Update	Celena Tulloss	University of Tennessee

FRIDAY, JUNE 11TH, 2021

State Programs Regulations and Procedures	Pennie Strong	Georgia Student Finance Commission
Business Manners and Etiquette	Bill Ayers	College Ave Loans
Head of Household Deep Dive	Robert Weinerman	Iron Bridge Resources
Is Your Career Trajectory Where it Should Be? How to Build Your 5-Year Plan Using Reasonable Objectives	Felicia Alister	Mentorship Committee

SESSION INFORMATION

MONDAY, JUNE 14TH, 2021

CHECS - Understanding the Student's Calculation Record	Sonyá Grier	Georgia Student Finance Commission
Financial Aid's Roadmap and Framework for Reversing FAFSA Deadlines	Nick Burrell	Ocelot
Challenging Verification Scenarios	Dana Kelly	NASFAA
University System of Georgia Sector Meeting	Tracy Ireland and Rich Loftus	University System of Georgia
Private Schools Sector Meeting	Jena Colvin	
Understanding Our Students	Sam Lester	Central Georgia Technical College

TUESDAY, JUNE 15TH, 2021

CHECS - Understanding and Creating Historical Snapshots	Sonyá Grier	Georgia Student Finance Commission
Time Management for the Overworked and Overwhelmed	Kathleen Roebuck and Lisa Albers	Cognition Financial
NASFAA Updates and HERRF Reporting	Megan Coval	NASFAA
Changing the Conversation	Sam Lester	Central Georgia Technical College

SESSION INFORMATION

WEDNESDAY, JUNE 16TH, 2021

Professional Judgment Best Practices	Dana Kelly	NASFAA
Future-Proofing College Financial Aid	Carlo Salerno and Jim Crichton	CampusLogic
Getting Your House in Order: How to Prepare for an A133 Audit or Program Review	James Chiara	Technical College System of Georgia
Open Forum on Taxes and Need Analysis	Robert Weinerman	Iron Bridge Resources
CHECS Checkpoint and Academically Ineligible	Sonyá Grier	Georgia Student Finance Commission

Play for a Chance to Win!

GASFAA Vendor Word Scramble



!!!

Visit all 13 vendors to get the words you need to complete the sentence!

Submit your answers to Joe Buchholz at jbuchholz@ggc.edu by 1:30PM on June 15th to be entered into the drawing.

Name

Email

SUBMIT



Hey, you!

To enhance your conference experience, check out the activities below....

you just might win a prize!



Purchase a [STRONGER TOGETHER 2021 GASFAA Conference T-shirt](#) for \$12!

-
- ▶ [ENGAGE @ GASFAA](#) - visit the Virtual Exhibit Hall to meet with our Sponsors and mingle with your colleagues.
 - ▶ Complete the [Vendor Word Scramble](#) to enter in a drawing.
 - ▶ Support our students by purchasing tickets for the [GASFAA Past Presidents' Raffle](#). All proceeds go to the GASFAA Memorial Scholarship Fund!

Support GASFAA by using the **#GASFAAStrongerTogether** hashtag on social media. If you post a picture on GASFAA's Facebook page, you will be entered to win a **\$25 gift card**.

Make sure to get your pic in before **June 16th!**

MEET THE PRESENTERS



Nick Burrell

VP of School Partnerships
Ocelot

Nick Burrell is a VP of School Partnerships at Ocelot. Ocelot is a technology and content company that serves over 450 higher education institutions in the US. Ocelot's mission is "to make a better life more accessible." Ocelot provides an AI powered student engagement platform consisting of chatbot, live chat, and text campaigns. Ocelot has the largest US chatbot community in the higher ed space.

Nick has over 12 years of experience working in student services at colleges and universities including CU Boulder. Nick has been a product and solution expert at Ocelot for over 6 years. His expertise lies in crafting solutions for clients and demonstrating the value of the product. He now performs product demonstrations for prospective clients. Nick has a passion for music and is a frequent karaoke participant.



Lisa Albers

Director of Business Development
Cognition Financial

Lisa Albers has worked at Cognition Financial for 10 years and in the private student loan industry for over 25 years. Helping families understand not only their financing options, but the entire financial aid process, has always been her goal.

Lisa resides in Wisconsin and is using her experience firsthand this year as her daughter just graduated high school and is entering the college world.



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Chansone Durden

Sr. Account Executive
Campus Partnerships
Earnest, LLC

Chansone Durden graduated from the University of Florida in Economics. She started working in financial aid as a student worker, then after graduation worked at UF professionally. She has worked at the Florida Department of Education, California State Education Commission/EdFund, and Texas Guaranty now Trellis. She has also worked with other lending companies before her current position with Earnest Private Student Loans. She is passionate about access to higher education, especially for underserved students, being first-generation herself.

She loves the quote from her friend "education is an equalizer and travel is the best education". She loves learning about other cultures and believes that the best way to learn about a culture is through appreciating their food and the history behind the food.

earnest



Shannon Jones

Assistant Vice President
Business Development
Inceptia

Shannon's experience in several areas of higher education began at Shorter University in admissions where her primary responsibility was conducting presentations about the university and the financial aid process. She transitioned to the student lending arm of Regions Bank conducting workshops on financial literacy and money management for audiences from high school students to financial aid professionals. While with SallieMae, Shannon found herself in college financial aid offices educating students and parents about the loan process and financial literacy. Shannon also conducted entrance and exit counseling sessions throughout the southeast region and has experience at USAFunds, partnering with organizations to conduct workshops at colleges in Georgia, including Money Matters through the FDIC. She is an advocate for colleges helping them to develop best practices for their default management strategies including briefing college Presidents, College Boards, and Councils. Shannon brings her knowledge to Inceptia to help schools apply customized plans that meet their specific needs with the focus of helping their students achieve financial success.

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Jim Crichton

Account Executive
CampusLogic

With more than 15 years of experience, Jim works to address the software needs of colleges and universities. He works closely with institutions to identify the right solutions for student enrollment and retention within the CampusLogic platform to enable student financial success. Jim is based in Charleston, South Carolina, and when he is not traveling for business, you will find him outside either playing golf, riding his motorcycle, or at the beach.

campuslogicSM



Carlo Salerno

Vice President of Research
CampusLogic

Over an 18-year career, Carlo Salerno has done higher education research for the federal government, co-founded an education analytics company, advised European and African education ministries and conducted a wide range of analytical studies for national advocacy groups and the student lending industry.

As a thought leader on the economics of higher education, his writing has been published in Forbes, Inside Higher Ed, The Hill, and the Huffington Post among other places.

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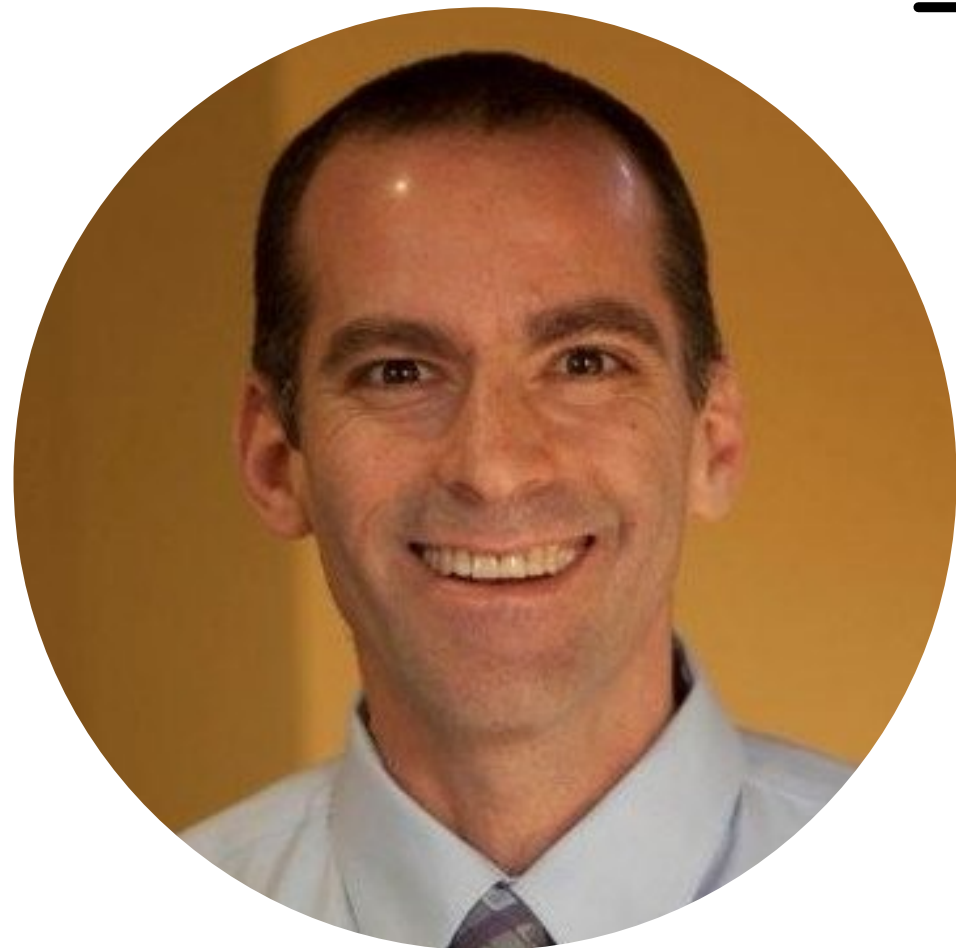


Kathleen Roebuck

Regional Manager for SASFAA Region
Cognition Financial



Kathleen Roebuck joined the Cognition Financial team this past April as the Regional Manager for the SASFAA region. Helping individuals obtain an education has been her career journey. She has supported schools, families, and students by working in college admission and financial aid offices as well as for lenders and companies representing products supporting higher education.



Robert Weirnerman

Director of Training
Iron Bridge Resources, LLC



Robert Weirnerman started his financial aid career in 1993 as a financial aid officer at MIT - where he quickly became the aid officer who reviewed the most complicated tax returns that families submitted. After more than a decade as an aid officer at MIT, Babson College, and a few other schools in the Boston area, Robert left the aid office to counsel students and parents about saving and paying for college as the Senior Director of College Finance at College Coach.

Robert began his current career as a trainer for financial aid officers six years ago, focusing specifically on financial aid and the tax code - and was selected by Jim Briggs as Jim's successor when Jim retired from tax training to work on his other businesses.

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Pennie Strong

Vice President of Program Administration
Georgia Student Finance Commission

Pennie Strong is the Vice President of Program Administration at Georgia Student Finance Commission. She joined GSFC in 2012.

Prior to GSFC, Pennie worked for Central Georgia Technical College where she developed a commitment for serving students with a number of positions including Financial Aid Director and Dean of Student Affairs. Pennie is GASFAA Past President 2008-09 and an active member currently serving on the Executive Board as Budget and Finance Chair.

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Finance Commission



Sonyá Grier

Program Administration Program
Coordinator for CHECS

Georgia Student Finance Commission

Sonyá Grier joined the Georgia Student Finance Commission in April 2018 as the Program Administration Program Coordinator for CHECS. Prior to GSFC, Sonyá worked as the Assistant Director for State Programs for Georgia Institute of Technology and managed processing and awarding HOPE and Zell Miller Scholarship funds.

Sonyá is a 15 year member of GASFAA and as the go to person for all your CHECS questions she is excited to share her knowledge of CHECS with all of you at the virtual spring conference.

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Megan Coval

Vice President of Public Policy
**National Association of Student
Financial Aid Administrators**

Megan is the vice president of public policy and federal relations at NASFAA where she oversees the association's policy and advocacy efforts. Prior to joining NASFAA in the fall of 2010, she served as the director of government relations for the federal Advisory Committee on Student Financial Assistance, where she contributed to several congressionally mandated reports on the postsecondary access and persistence of low- and moderate-income students.

Megan began her career in higher education as an admissions counselor at Pennsylvania State University. She holds a master's degree in higher education from Penn State and a bachelor's degree in political science from Allegheny College.



Dana Kelly

Vice President of Professional Development
& Institutional Compliance
**National Association of Student
Financial Aid Administrators**

Dana currently serves as the vice president of professional development and institutional compliance for NASFAA. In this role she oversees all products and services assigned to the training and regulatory assistance and certification and credentialing departments, supervises DC-based 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's degree in justice and policy studies from Guilford College, a master's degree from the University of Phoenix in organizational management, and master's degree in public administration from the University of North Carolina at Greensboro.



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Celena Tulloss

Acting Director in the Office of
Financial Aid and Scholarships
University of Tennessee

Celena Tulloss has 20 years' experience in financial aid, having served in community action scholarship programming, as the Executive Director of Financial Aid at Lincoln Memorial University, and in progressively responsible roles at Tennessee since 2008. She holds a BS and MS in Educational Leadership from Union College.

Celena is actively involved in leading professional organizations dedicated to the advancement of student financial aid, through training and advocacy. She has served in many roles, including the President of the Tennessee Association of Student Financial Aid Administrators (TASFAA) and is the current President of the Southern Association of Student Financial Aid Administrators (SASFAA) that encompasses 9 states- Kentucky, Virginia, Tennessee, North Carolina, South Carolina, Mississippi, Alabama, Georgia and Florida. Celena also serves the national association (NASFAA) as a member of their Rapid Response team and an observer on the board of directors.



Sam Lester

Director for Professional Development
and Special Projects
Central Georgia Technical College

Sam Lester was raised on a family farm in rural Dooly County. He is a 1992 Business Education graduate of Georgia Southwestern College and received his Masters degree in Occupational Studies from the University of Georgia in 2000. He began his career in Education in 1993 with then Middle Georgia Technical Institute. 28 years later, he is now at Central Georgia Technical College and the Director for Professional Development and Special Projects after having served for 17 years as Accounting instructor. He lives in Perry with his wife Amanda and son Eli.



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Brenda Brown

Director of Business Development
and Consultant
College Aid Services

Brenda joined College aid Services as a Senior Consultant to share her functional and technical experience with clients. She also serves as the Director of Business Development at College Aid Services and serves as an account executive to all clients, plus manages the training webinar series and the consulting staff. She has 36+ years in higher education that is comprised of 34 years at the University of Miami.

Before financial aid, she managed enrollment, student records, academic probation, dismissals, and upper-level status for undergraduate students. Over her professional career, she has been a member and served on Executive Boards, various committees, or task forces at the national, regional, and state levels. She enjoys training and has supported conferences, workshops, symposiums, and webinars as committee chair, program chair, instructor, or presenter. Her peers have recognized Brenda for her service and/or significant contribution to the financial aid community at the national, regional, and state level.



Lakisha Sanders

Senior Consultant
College Aid Services

Lakisha Sanders is a Senior Consultant that fits College Aid Services category of "funky-tech" consultants. With over 20 years of experience in financial aid, Lakisha has held many roles in financial aid at various institutions throughout her career.

Lakisha gained financial aid experience by working for private 4-year institutions, public 4-year institutions, and 2-year institutions, gaining experience in many roles, from Financial Aid Advisor to Assistant Vice President of Financial Aid with over 10 years in leadership. Knowing all facets of financial aid is a priority that provided the opportunity to work for Ellucian Banner as a traveling Financial Aid Functional and Technical Software Consultant throughout the United States.



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James Chiara

Compliance Coordinator
**Technical College System of
Georgia**

James Chiara is originally from San Francisco California, and has been working in higher education for over 10 years in financial aid and IT. He is currently the compliance coordinator for student affairs with TCSG. Previously, he was the director of financial aid at Georgia Piedmont Technical College, where he successfully navigated the college out of heightened cash monitoring 2 following a federal program review. He specializes in systematic compliance solutions using reporting and SQL to prepare for, and navigate, state and federal audits.



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SCAVENGER HUNT

**Tune in to each session for an
"Animals of GEORGIA" scavenger hunt!**

RULES: Spot the animals below in the session presentations and correctly match them with the corresponding session for a chance to be entered into a drawing to win a **\$25 gift card!**

Complete the [Google Form](#) with your answers for a chance to be entered into the drawing by Tuesday, June 15th at 10:00 am. A **winner** will be announced during the closing session on **Wednesday, June 16th.**

Any one of the animals below can be found in any session.

Good Luck!



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