



NCASFAA

# SPRING CONFERENCE

April 6-9, 2025

CLIMBING HIGHER TOGETHER  
EMPOWERMENT

ELEVATING EACH OTHER FOR SUCCESS

# Welcome

## FROM THE PRESIDENT



It is my absolute pleasure to welcome you to the **2025 NCASFAA Spring Conference!** This year, we gather under the theme of **Empowerment**—a theme that reflects not only our commitment to supporting students but also our dedication to growing as professionals and as a community.

Every day, we empower students by providing access to education, guiding them through financial challenges, and ensuring they have the resources to succeed. And just as we empower our students, this conference is here to **empower YOU**—through knowledge, collaboration, and innovation.

Over the next few days, you'll have the opportunity to engage with inspiring speakers, dive into critical policy updates, and connect with colleagues who share your passion for student success. But empowerment isn't just about the work we do—it's also about making a difference in the world around us.

That's why we are proud to support this year's conference charity, the **Society for Women's Health Research (SWHR)**. This incredible organization is dedicated to advancing women's health through research, education, and advocacy. Their work is vital in ensuring that women's health issues receive the attention and funding they deserve. We encourage you to join us in supporting this important cause—whether through donations or simply by helping to spread awareness. Every contribution makes an impact.

As we navigate the ever-changing landscape of financial aid, let us remember: empowerment starts within. It starts with each of us recognizing the impact we have, the knowledge we hold, and the difference we make. **So let's embrace this time together, uplift one another, and leave here ready to empower not only our students—but also ourselves.**

Welcome to the NCASFAA 2025 Spring Conference! Let's make it a great one!

**"Climbing Higher Together"**  
**All the best,**  
**Lee Bray**  
**2024-25 NCASFAA President**

# Welcome

## FROM THE CONFERENCE CHAIR



**Greetings! I am glad you could join us for the 2025 Spring NCASFAA Conference. It has been a true honor to serve as your Conference Chair this year. It has been especially fun planning this conference with an amazing Conference Committee. I am truly thankful for each person who has served on this committee. It takes a village to ensure an amazing conference happens. I am grateful to President Lee Bray for trusting me to be in this position.**

**I am excited to gather in Cherokee this week as a united community in this wonderful association, NCASFAA. Each one of us is passionate about different things in our careers, while having the same goal in mind in shaping the future, helping students realize their potential, and creating pathways for success that allow every individual to thrive, regardless of their background or financial situation.**

**This theme – empowerment – resonates deeply in our work. Empowerment is not just about providing financial support; it's about giving individuals the tools, resources, and confidence to reach higher and achieve their dreams. It's about elevating each other, sharing our knowledge and experiences, and creating a network that is stronger together than we could ever be apart.**

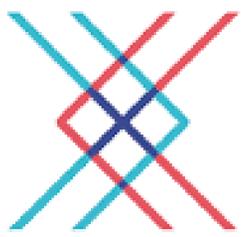
**Throughout this conference, we will explore new strategies, share innovative solutions, and connect with others who share the same mission. We are excited to have our special guests with us this week NCASFAA's very own Dana Kelly from NASFAA, Heather Boutell from Vanderbilt University, and Leigh Ann Hussy from University of West Georgia and the current SASFAA President. The conference sessions are chock full of so much information that we hope you will enjoy yourselves and who knows, maybe you will be able to find some tips and tricks to make things easier in your offices.**

**The journey of financial aid is not always easy, but as the theme suggests, when we lift each other up when we collaborate, and when we empower those around us, we all climb higher. Our collective success depends on how we elevate one another, and together, we are making an impact that will resonate for generations to come.**

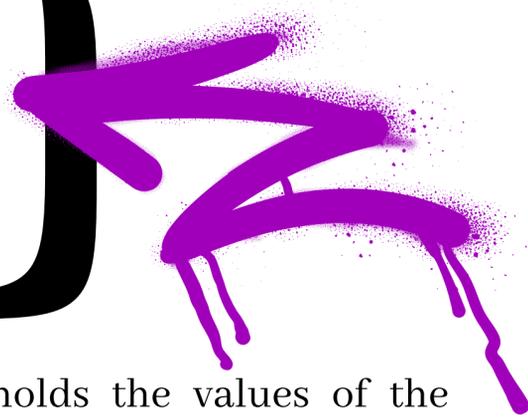
**I am excited for the discussions, ideas, and collaborations that will take place over the next few days. Let's use this time to learn from each other, inspire each other, and, most importantly, continue to make a difference in the lives of students everywhere.**

**I look forward to the incredible sessions ahead. Let's climb higher together!**

**Michelle Hemmer  
2024-25 Conference Chair**



Society for  
Women's Health Research



At each conference, the President will choose a charity that they feels upholds the values of the communities we serve in hopes of providing support so they can continue to achieve their mission. President Bray has chosen Society for Women's Health Research (<https://swhr.org>) as the charity she would like members of NCASF AA to donate funds to support.

We are using Charity Auctions Today for our on-line bidding site found [here](#). From this site you can create your account and add your cell phone number for text updates. If you win an item, you will receive an invoice to pay for your item. Please keep in mind that a tip is already added to your invoice. If you choose to tip that money goes directly to NCASF AA to pay for our fees associated with using the bidding site. You can also choose to zero out your tip as well. The site will be open from Sunday, April 6 at noon through Tuesday April 4th at 4PM.

We have lots of great items up for bid, and we are looking for more donations to make this a success. Please contact Janee at [janee.knippenberg@pnc.com](mailto:janee.knippenberg@pnc.com) if you have an item you would like to donate. As always, we will have a 50/50 raffle. If you prefer to make a cash donation directly you can do so from [ncasfaa.com](http://ncasfaa.com) or click [here](#).

**The Mission of the Society for Women's Health Research is to advance Women's health through science, policy, and education while promoting research on sex differences to optimize women's health.**

**Charity Table Hours:**

**Bidding Begins: Sunday 12pm**

**Monday: 9-5pm**

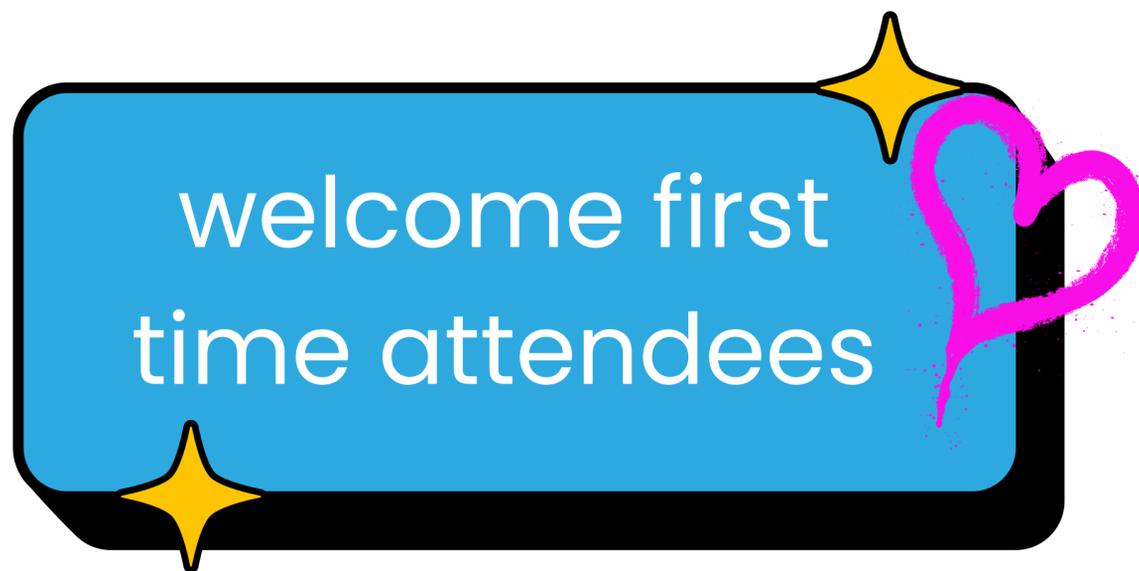
**Tuesday: 9-4pm**

**SCAN**

**ME**

**TO BID!**



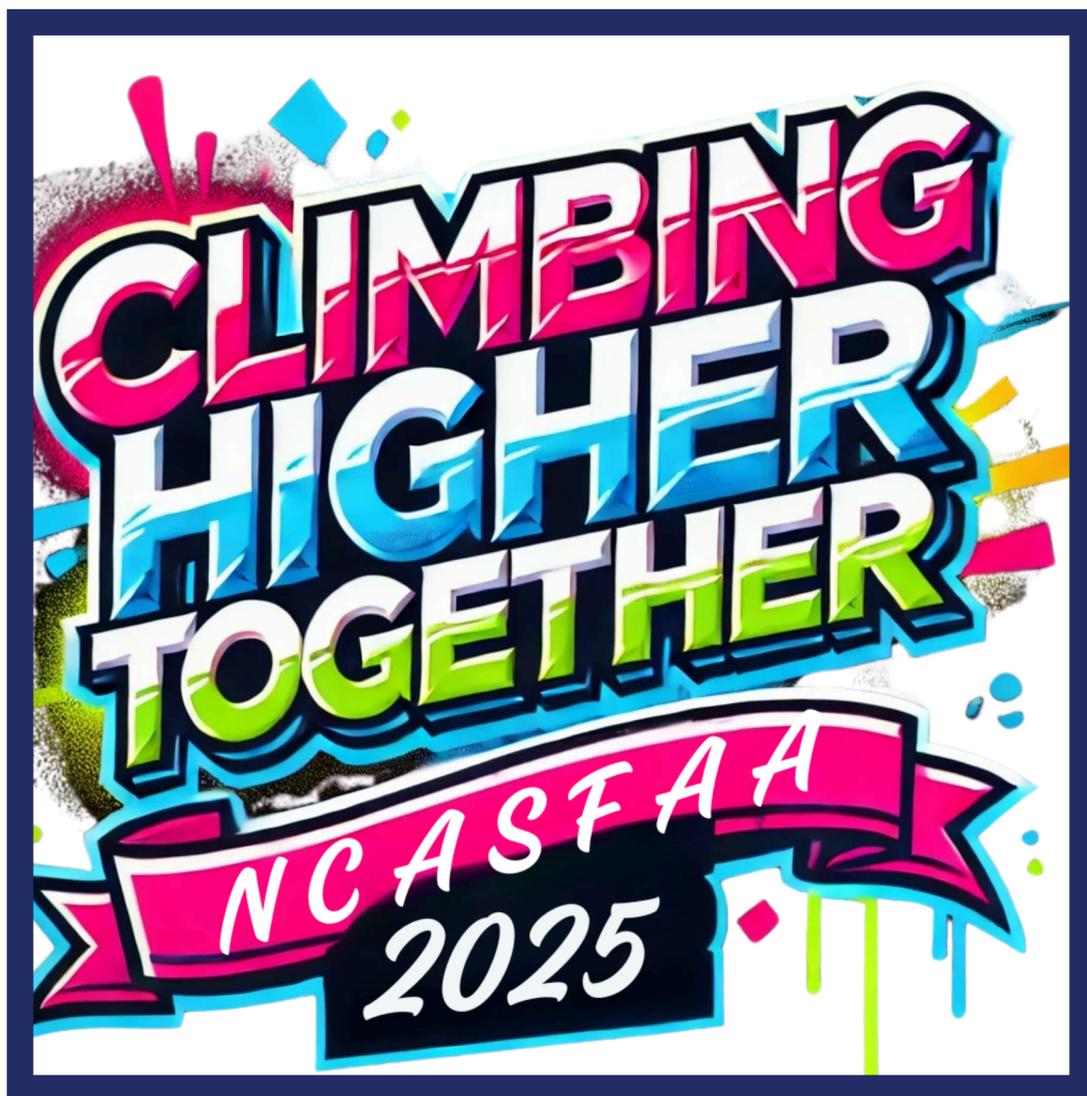


**Jordan Adams, University of North Carolina Wilmington**  
**Tia Anderson, College Foundation, Inc**  
**Mandy Annas, University of North Carolina at Charlotte**  
**Altovise Barber, Belmont Abbey College**  
**Josiah Buchanan, SouthWestern Community College**  
**Bridget Cotino-Benitez, Lees McRae College**  
**Lindsey Dorsett, Rowan-Cabarrus CC**  
**Jacob Frizzell, Southwestern Community College**  
**Carlee Hastings, Warren Wilson College**  
**Tewana Jones, Wake Technical Community College**  
**Emily Kamuabo, Wake Technical Community College**  
**Dannielle Lange, Tri-County Community College**  
**Paula Langston-Ware, College Foundation, Inc.**  
**Kristopher Mathews, University of North Carolina at Charlotte**  
**Hannah Oxendine, Isothermal Community College**  
**Patricia Russell, Wake Technical Institution**  
**Mayra Salgado Castillo, Durham Technical Community College**  
**Wendy Sambou, Winston-Salem State University**  
**Yasmin Saums, North Carolina Agricultural and Technical University**  
**Laura Scott, Lees-McRae College**  
**Eugene Self, Mayland Community College**  
**Mary Shuping, NCSEAA**  
**Michael Sikes, East Carolina University**  
**Craig Slaughter, Wake Forest University**  
**Jenna Smith, Fayetteville Technical Community College**  
**Sabrina Strickland-Deese, Fayetteville Technical Community College**  
**Robert Venters II, Pitt Community College**  
**Audrey White, University of North Carolina at Chapel Hill**  
**April Wolford, University of Tennessee College of Law**  
**Dawn Woodard, Richmond Community College**



# CONFERENCE T-SHIRTS

**Available at the  
Check-In table for \$10!**



**At the Banquet, Attendees are encouraged to wear the conference  
t-shirt or a white t-shirt!**

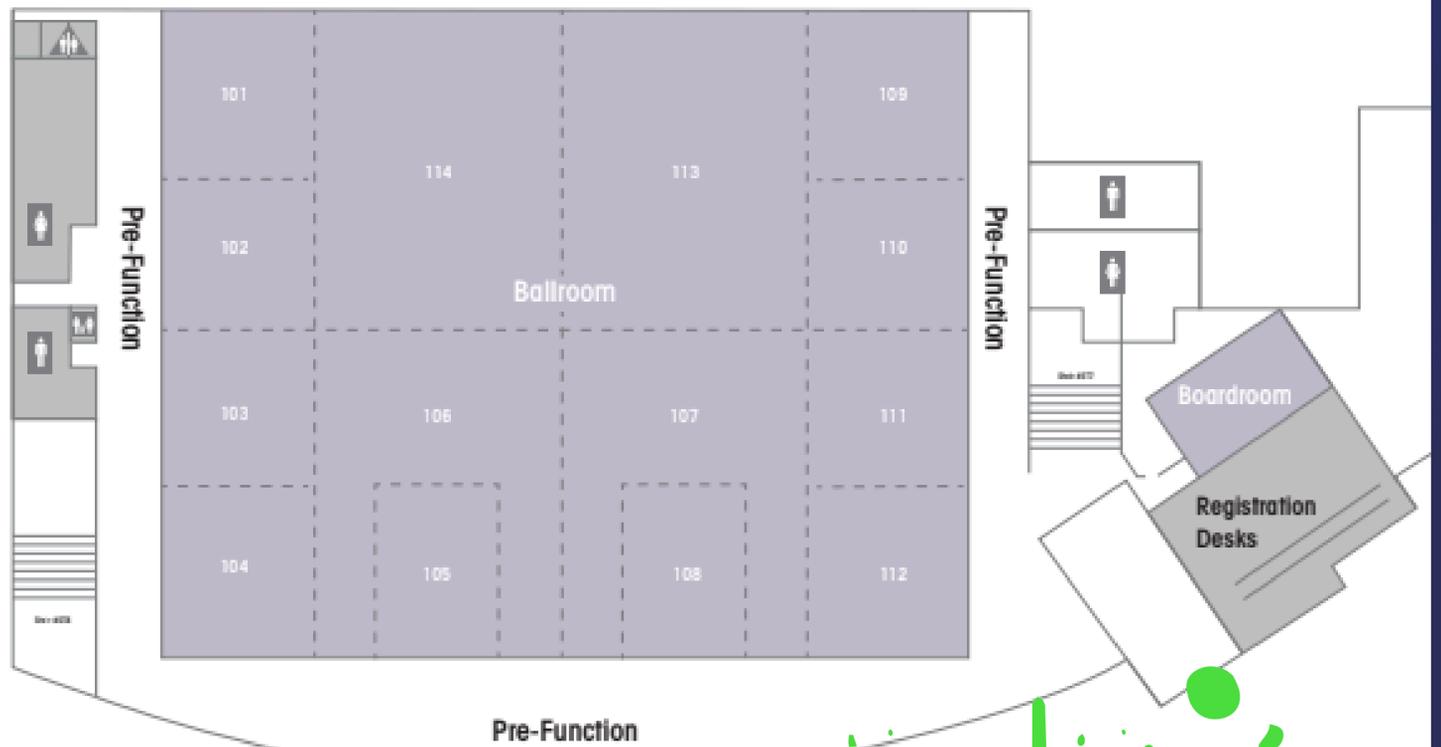
**We will graffiti them with positivity and lift each other up!**

**SCAN  
ME  
TO BID!**



# CONVENTION CENTER

## THIRD FLOOR



# CONFERENCE CENTER MAP

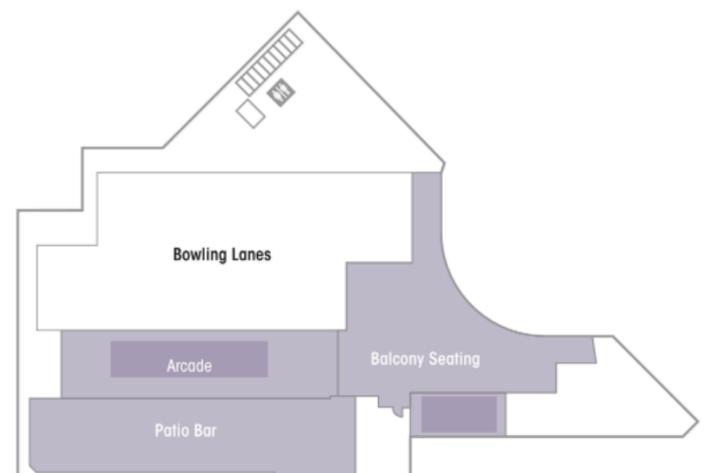
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# ULTRASTAR MULTI-TAINMENT CENTER

## FIRST FLOOR



## SECOND FLOOR - STRIKES LOUNGE



**Sunday, April 6th**

**12:00–1:00 PM**

**Pre-Con Registration Open**

**12:00 PM**

**Charity Bidding  
Begins Online**

**SCAN  
ME  
TO BID!**



**12:30– 5:00 PM**

**Director's Summit**

CON 106

**Intermediate Aid Officer Training**

CON 104

**1:00 – 3:00 PM**

**Conference Committee Meeting**

CON 105

**3:00–5:00 PM**

**Executive Board Meeting**

CON 105

**3:00 – 5:00 PM**

**Exhibitor Setup**

CON Pre-Function

**3:15 – 3:45 PM**

**Snack Break**

Pre-Function Left

**5:30–8:00 PM**

**Executive Board Dinner \*Invite Only\***

UltraStar (2nd Floor)

**8:00 – 11:00 PM**

**Hospitality Suite Open**

Cherokee Tower Hospitality Suite 4325 ADA

**Conference Wifi:  
Harrah\_conference  
Password: cfbapril2025**

**NCADFAA**

# Monday, April 7th

**6:00 – 10:00 AM**

**Exhibitor Setup**

Pre-Function

**7:15 – 8:00 AM**

**Early Morning Snack**

Pre-Function Left

**8:00–11:45 AM**

**Registration Open**

**8:30–11:45 AM**

**Director's Summit**

CON 103

**Intermediate Aid Officer Training**

CON 104

**9:00 AM – 5:00 PM**

**Charity Table Open**

**10:00 AM – 12:00 PM**

**Professional Affiliates Area Open**

**12:00–2:00 PM**

**Opening Business Meeting & Lunch**

**Presentation of Colors:** Smoky Mountain High School

**National Anthem:** 1st Lt. Victoria Moore and Cpl. Kalyn Allen

**State of the State**

**Charity Introduction**

CON 101/102/114

**2:00–2:15 PM**

**Break and Networking with Professional Affiliates**

**Conference Wifi:**  
**Harrah\_conference**  
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**NCADFAA**

**Monday, April 7th**

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**2:15 - 3:45 PM**

**Top AskRegs: Your Most Pressing Questions Answered**

CON 101/102/114

**4:00 - 5:00 PM**

**Concurrent Sector Meetings:**

- **2-Year Public Sector**

CON 106

- **4-Year Public Sector**

CON 103

- **Independent Sector**

CON 104

**5:00-6:00 PM**

**President's Reception \*Invite Only\***

Cherokee Tower Hospitality Suite 4325 ADA

**6:00 PM**

**Dinner On Your Own**

See you tomorrow!

**8:00 - 11:00 PM**

**Hospitality Suite Open**

Cherokee Tower Hospitality Suite 4325 ADA

**NCASFAA**

# Tuesday, April 8th

**6:45-7:45AM**

**Continental Breakfast**

Pre-Function Left

**8:00 - 10:00 AM**

**Registration Open**

**8:00 AM - 4:00 PM**

**Charity Table Open**

**Professional Affiliates Area Open**

**8:00-9:00 AM Concurrent Sessions**

- **Summer Aid Simplified**

CON 106

- **Why Set A FAFSA Goal?**

CON 104

- **Satisfactory Academic Progress (SAP) - Dealing with Students Facing Obstacles and Helping them Overcome Challenges**

CON 103

**9:10-10:10 AM Concurrent Sessions**

- **Meditation for Fidgety Skeptics**

CON 104

- **Resolving Conflicting Information: Compliance & Best Practices**

CON 106

- **Professional Judgement - The Ultimate Gift of Empowerment from the Feds**

CON 103

**10:10 - 10:20 AM**

**Break**

**10:20 - 11:20 AM Concurrent Sessions**

- **Navigating the GE/FVT Maze**

CON 104

- **State Grants - Summer and 25-26 Updates**

CON 106

- **Staffing and Succession: Doing More with Less**

CON 103

**SCAN  
ME  
TO BID!**



**Conference Wifi:**  
**Harrah\_conference**  
**Password: cfbapril2025**

**NCADFAA**

**Tuesday, April 8th**

**11:25 AM - 12:25 PM Concurrent Sessions**

- **Return to Title IV (R2T4): Compliance, Calculations, and Best Practices**  
CON 106
- **A Guide for New Financial Aid Professionals**  
CON 104
- **Federal Work Study: The Nuts and Bolts**  
CON 103

**12:30-2:00PM**

**Lunch On Your Own**

**New Member Lunch \*Invite Only\***

CON 101/102/114

**2:15 - 3:15 PM**

**The State of Financial Aid (Present & Future)**

CON 101/114

**3:25-4:25 PM Concurrent Sessions**

- **What if AI Could Transform the Way We Build Leadership Pipelines?**  
CON 106
- **Natural Disasters: Supporting Students through Financial Aid**  
CON 104
- **Show Me the Signs: How to Recognize and Prevent Student Loan Fraud**  
CON 103

**4:30-5:00 PM**

**Snack Break**

**Last Chance to Bid on Charity Items**

**6:30-11:00 PM**

**Awards and Passing of the Gavel**

**SASFAA Update**

**Banquet & Dancing!**

Qualla Dinner Buffet

Cash Bar

**NCASFAA**



**Wednesday, April 9th**

# **SCHOOL COLORS DAY!**

Wear your school colors for school spirit!!

**7:30 - 8:30 AM**

**Breakfast**

Pre-Function Left

**8:30 - 9:45 AM**

**Federal Update: Stay in the Know to  
Elevate Your Knowledge and Advocacy**

CON 101/114

**9:45 - 10:45 AM**

**Partnering for Success: NASFAA Has  
Your Back**

CON 101/114

**10:45 - 11:15 AM**

**Spring 2025 Conference Closing Remarks**

CON 101/114

**SAFE TRAVELS!**

**SEE YOU NEXT SPRING!**

**WRIGHTSVILLE BEACH**

**MARCH 30 - APRIL 1, 2026**

**NCASFAA**

SCAN ME

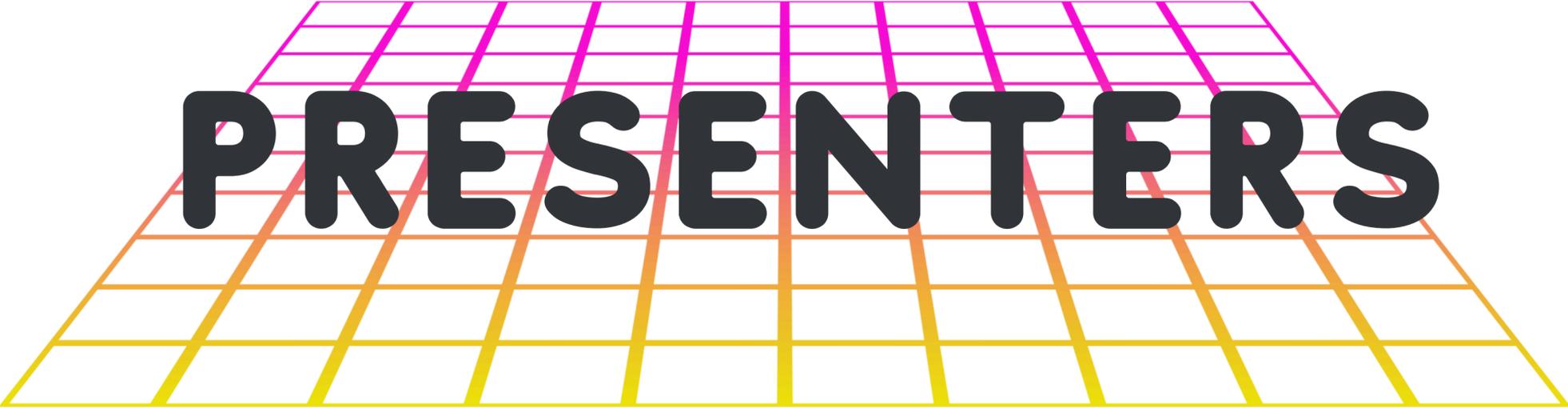


**Complete the  
Conference Survey!**



**GENERAL**

**SESSION**



**PRESENTERS**

**Dana Kelly**



**Dana Kelly currently serves 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, Certification and Credentialing and meetings departments, supervises DC-based and remote training staff, manages the annual Leadership & Legislative Conference & Expo, serves as the primary logistics manager for NASFAA's national conference, including session content, and oversees NASFAA's corporate partner area. 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.**

**Dana has over 30 years' experience working within the financial aid community. 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.**



# DR. HEATHER BOUTELL

**Dr. Heather Boutell 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. 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 received the KASFAA and SASFAA Distinguished Service Awards, and the NASFAA Regional Leadership and Meritorious Achievement Awards 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. She recently earned her Ed.D. at Lipscomb University. Heather, her husband Steve, and cat Crouton reside in Lebanon, TN. They have two adult sons who both live in Chicago. For fun, Heather loves reality TV competition shows – ask her about Survivor, Top Chef, or Amazing Race!**



# LEIGH ANN HUSSEY

**Leigh Ann Hussey is the Assistant Vice President for Enrollment and 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.**

*Dolly*  
**MARTON**



# LEE BRAY



**Lee Bray currently serves as the Senior Director of Financial Aid, Veterans Affairs and Student Resource Centers at Pitt Community College. Lee has earned a Bachelors Degree in business Management and Masters in College Student Personnel. She started her financial aid career as a Federal Work Study student in the FA office while obtaining her undergrad degree. She has since worked in the capacity of financial aid counselor, Assistant Director and eventually Senior Director for the past 18 years. Lee has been a member of NCASFAA for 7 years and currently holds office as President. She is also an active member of NASFAA, SASFAA, is a certified FAAC, NASFAA Adjunct Instructor and serves on various NASFAA Committees. Originally from Pennsylvania, Lee enjoys the warm weather down south, kayaking, camping, golfing and going to the beach.**



**SESSION  
DESCRIPTIONS**

# MONDAY

## Top AskRegs: Your Most Pressing Questions Answered

Dana Kelly, NASFAA

Join NASFAA's Vice President of Professional Development & Institutional Compliance, Dana Kelly as she unpacks the most frequently asked and timely questions from AskRegs. This session will spotlight key federal student aid issues, clarify complex regulations, and offer practical guidance for compliance.

# TUESDAY

## Summer Aid Simplified

Dana Kelly, NASFAA

Explore the ins and outs of offering financial aid during the summer term. This session will cover eligibility, packaging strategies, and key compliance considerations to help institutions support students year-round. Learn best practices and tips for streamlining the summer aid process and maximizing student eligibility.

# TUESDAY

## Why Set a FAFSA Goal?

Kathy Hastings, NCSEAA

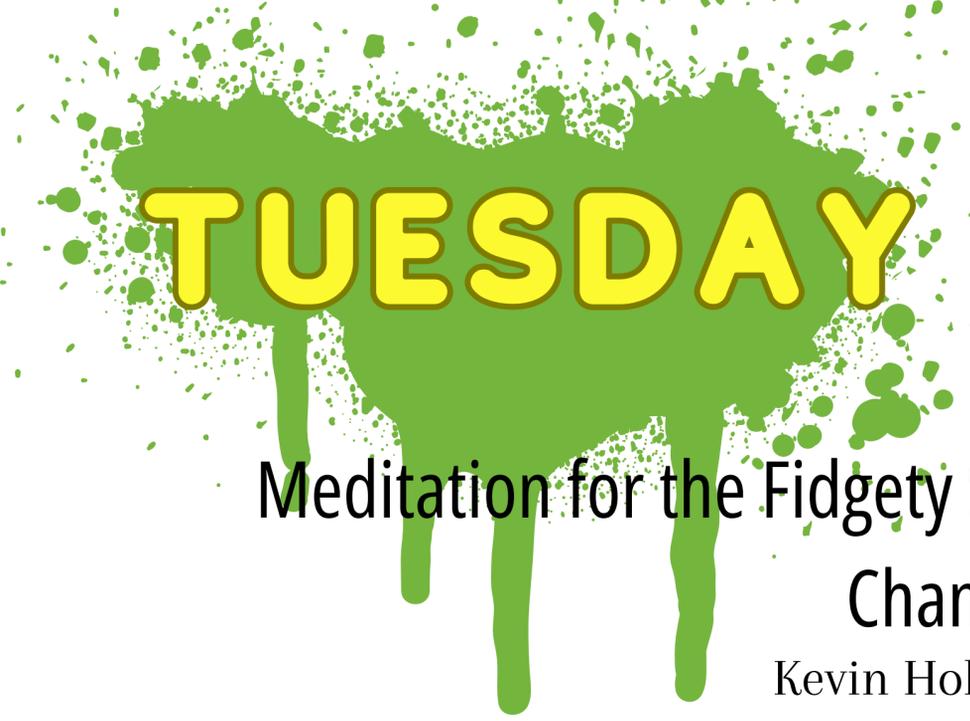
Between the pandemic and the challenging Better FAFSA rollout last year, the 80% statewide FAFSA completion goal set by myFutureNC as part of the statewide 2M by 2030 attainment goal no longer reflects conditions on the ground. Yet we know FAFSA completion is an essential step in most students enrolling in college, and it is an indicator of fall enrollments.

In this session we'll look at some key metrics to better understand FAFSA completion trends so you can make informed decisions about local FAFSA goal setting and support with your partners. Attendees will also be able to vote for a statewide FAFSA Completion goal. Let your voice be heard!

## Satisfactory Academic Progress (SAP) – Dealing with Students Facing Obstacles and Helping Them Overcome Challenges

Heather Boutell, Vanderbilt University

This session will focus on the requirements that must be included in your SAP Policy, and the latest on issues surrounding SAP. We will discuss some SAP appeal scenarios to see if you would approve or deny the request. We will also debate SAP warning and probation and discuss what is best for your students and/or your office. How you deliver bad news can make all the difference.



# TUESDAY

## Meditation for the Fidgety Skeptic - A Book Report that Could Change Your Life

Kevin Holman, College Ave

“Science suggests that meditation can lower blood pressure, mitigate depression and anxiety, and literally rewire key parts of the brain, among numerous other benefits.” Did you know this? ABC news anchor Dan Harris does, and after having a panic attack on live TV, he’s trying his best to share his story with those of us who might not buy into all the “meditation hype.” After all, he was the biggest skeptic you could find. In this session, we’ll give you the CliffsNotes version of his best-selling book *Meditation for Fidgety Skeptics*, along with an arsenal of tips and tricks to get your mind to stop racing, even if just for a little while. Please don’t be scared – there will be no one sitting on floor pillows or group chanting! This is for those of us living in a fast-paced, high-stress world who need to turn off the noise – whether it’s at our desk, waiting in line at the grocery store, or lying in bed staring at the ceiling in the middle of the night.

## Resolving Conflicting Information: Compliance and Best Practices

Dana Kelly, NASFAA

**Conflicting information in student financial aid administration can create compliance risks and delay aid processing if not properly identified and resolved. This session will provide financial aid administrators with a deep dive into the regulatory requirements for handling conflicting information, including how to detect inconsistencies across FAFSA data, tax documents, and institutional records. Attendees will learn best practices for documenting and resolving discrepancies while maintaining compliance with federal regulations. Practical case studies and real-world scenarios will help participants develop strategies for reducing errors, improving efficiency, and enhancing student communication.**

# TUESDAY

## Professional Judgement - The Ultimate Gift of Empowerment from the Feds

Heather Boutell, Vanderbilt University

Professional judgment (PJ) is sometimes viewed as challenging, but in reality, the financial aid administrator has statutory authority to make a difference. This session will cover the details of PJ and changes to PJ in 24-25. We will discuss some scenarios to see if you would approve or deny the request. Leave empowered to comfortably make changes to help your student population.

## Navigating the GE/FVT Maze

Leigh Ann Hussey, The University of West Georgia

Get ready to dive into the latest in federal regulations with a session that's equal parts informative and entertaining. We'll unravel the complexities of Gainful Employment and Financial Value Transparency, breaking down what you need to know to keep your programs on the straight and narrow. With a dash of humor and a sprinkle of practical tips, this session will equip you to tackle the new requirements head on—because who said compliance couldn't be fun? Whether you're feeling gainfully employed or just gainfully annoyed, we've got you covered!

## State Grants - Summer and 25-26 Updates

Traci Mitchell, CFI

Update and discussion of summer state grants, and updates for  
2025-2026



**TUESDAY**

## Staffing and Succession: Doing More with Less

Derrick Everhart, Queens University

Maggie Cross Bostic, Western Carolina University

Lee Bray, Pitt Community College

Nicole Buckner, Mars Hill University

The Financial Aid profession has been no stranger to unprecedented staff shortages since the COVID - 19 pandemic. A NASFAA survey found that 80 percent of institutions were concerned about their ability to remain "administratively capable" due to staffing issues. This will be a moderated conversational style session exploring what colleges and universities in North Carolina have experienced and are continuing to experience within their aid offices over the past several years. Our panelist range from various types of four-year and two-year institutions across the state.

## Return to Title IV (R2T4): Compliance, Calculations, and Best Practices

Dana Kelly, NASFAA

When a student withdraws from school, institutions must navigate the complex process of returning unearned Title IV funds. This session will provide a comprehensive overview of the Return of Title IV Funds (R2T4) regulations, including how to determine withdrawal dates, calculate earned and unearned aid, and ensure compliance with federal timelines. Attendees will also explore best practices for minimizing errors, managing post-withdrawal disbursements, and effectively communicating with students.

# TUESDAY

## A Guide for New Financial Aid Professionals

Preston Dodson, Citizens Bank

There is A LOT to learn as a financial aid administrator and with constantly changing rules and regulations, it's important to know where to go for the latest information. There is an abundance of training materials and resources available to you and in this session, we will share a list of tools to help you succeed on the job. You don't have to HAVE all the answers, but you do need to know where to find them!

## Federal Work Study - Nuts and Bolts

Tracy Rapp, Haywood Community College

Thomas Welch, Duke University

Have questions about your Federal Work Study Program and how to administer it? Come join us for a breakdown of the processes and best practices. Seasoned administrators will be available for your questions!

## State of Financial Aid (Present and Future)

Lee Bray, Pitt Community College

Heather Boutell, Vanderbilt University

Leigh Ann Hussey, The University of West Georgia

Dana Kelly, NASAA

Join us for a panel discussion on the current landscape and future direction of student financial aid. In this session, our panelists will reflect on key challenges, regulatory updates, and emerging trends shaping the financial aid profession. Panelists will address multiple topics of impact like FAFSA simplification, evolving regulatory requirements, student debt management, institutional funding concerns, and the impact of the new administration on aid administration. Questions from the audience are encouraged.

# TUESDAY

## What if AI Could Transform the Way We Build Leadership Pipelines?

Kevin Holman, College Ave

With staffing challenges in student financial aid at an all-time high, the ability to identify, develop, and retain future leaders has never been more critical. Traditional succession planning often falls short, relying on subjective assessments, limited data, and reactive strategies.

But what if AI could transform how we build leadership pipelines and create more effective succession planning?

This session explores how AI-driven insights can revolutionize succession planning, making it more proactive, data-driven, and equitable. We'll compare traditional approaches to AI tools that help pinpoint high-potential employees, streamline development plans, and enhance decision-making.

Through live polling, we will gauge attendees' views on AI and their institutions' current state of succession planning. In addition, as a group, attendees will engage with AI to build their own unique succession plan.

Don't miss this opportunity to discover how innovation can turn succession planning from a daunting challenge into a strategic advantage!

# TUESDAY

## Natura Disasters: Supporting Students through Financial Aid

April Query, CFI

In the wake of Hurricane Helene, our postsecondary education systems and CFNC came together to address particular needs of students and families strongly affected by the storm in terms of college access. Various needs were exacerbated in the world of college access, especially as they pertain to financial aid and paying for college. This session's goal is to bring together a panel of educators who are in the field and have worked very closely with these students and families both during Helene and through other natural disasters like it across our state, mostly through a financial aid lens. The panel will discuss:

Unique issues that students, particularly special populations such as students experiencing homelessness, face after natural disasters like Helene & how financial offices can support them;  
Ways in which LEAs and financial aid offices can work together to support students during natural disasters;  
How we can begin to put plans in place now to future planning.

## Show Me the Signs: How to Recognize and Prevent Student Loan Fraud

Casey Wallen, Sallie Mae

Join us for an insightful session where we will share tips to help protect your institution from deceptive practices in the student loan process. This presentation will explore the evolving tactics used by fraudsters to exploit the student loan system and the risks they pose for institutions and lenders alike. This session will highlight strategies for fraud prevention and steps to take if you suspect fraud.

# WEDNESDAY

## Federal Update: Stay in the Know to Elevate Your Knowledge and Advocacy

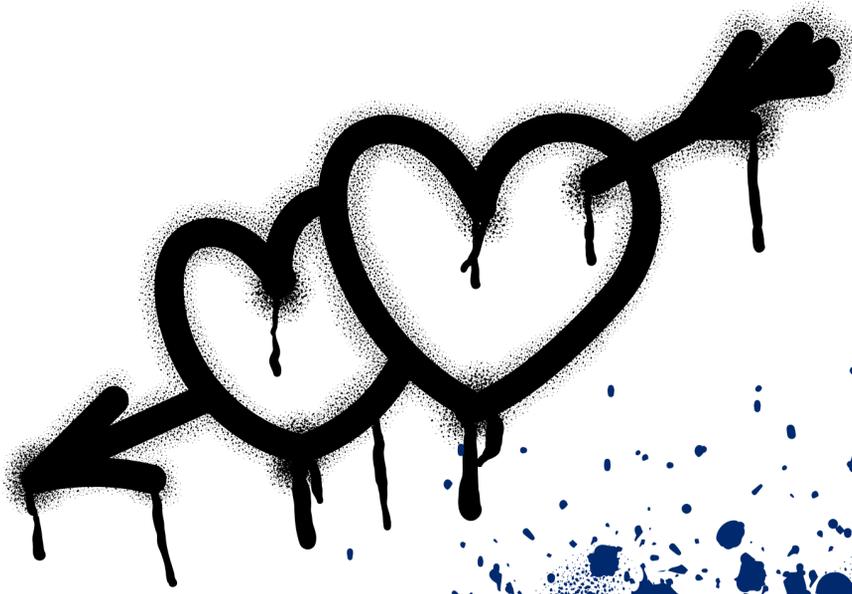
Heather Boutell, Vanderbilt University

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 2024–2025 and 2025–2026? David Bartnicki may not be with us, but Heather will channel her inner Dave to provide you with what you need to know!

## Partnering for Success: NASFAA Has Your Back

Dana Kelly, NASFAA

Financial aid is no small feat—and thankfully, you're not in it alone! In this session, we'll spotlight the many ways NASFAA supports aid administrators nationwide. From policy updates and compliance tools to professional development, peer networking, and advocacy on the Hill, NASFAA is your go-to partner in this ever-changing field.



**Special Thank You  
to all our Presenters**

**Lee Bray, Pitt Community College**  
**Leigh Ann Hussey, The University of West Georigie**  
**Heather Boutell, Vanderbilt University**  
**Mary Shuping, NCSEAA**  
**Dana Kelly, NASFAA**  
**Kevin Holman, College Ave**  
**Bill Ayers, College Ave**  
**Traci Mitchell, CFI**  
**Preston Dodson, Citizens Bank**  
**Derrick Everhart, Queens University**  
**Tracy Rapp, Haywood Community College**  
**Thomas Welch, Duke University**  
**April Query, CFI**  
**Casey Wallen, Sallie Mae**  
**Kathy Hastings, NCSEAA**

# 2024-2025

## NCASF AA Executive Board



**President** – Lee Bray

**Past President** – Rachel Cavenaugh

**President-Elect**- Tracy Rapp

**Vice President** – Tamara “Nikki” Glaspie

**Secretary** – Keats Ellis

**Treasurer** – Emily Jarrett

**Treasurer-Elect** – Vacant

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**Diversity Global Issues Chair**- Cecil Outlaw

**Legislative Advisory Chair** – Sherlock McDougald

**Membership Chair**– Lori Lewis

**Intermediate Aid Officers Chair** - Andrea Blount

**Professional Advancement (Webinars)** – Lisa Korteoff

**Professional Affiliates Chair** – Casey Wallen

**Program Committee Chair** (Fall and Spring) – Michelle Hemmer

**Publicity and Publications Chairs**– Madison Vance and Audrey White

**Site Selection Chair**– Janee Knippenberg

**State Agency Liason**– Shawn Henderson

**State & High School Relations Chair** – Ann Guevermont

**Technology Chairs** – Zilma Lopes and Stephen McLeon

**2 Year Public Sector Chair** – Hannah Golding

**4 Year Public Sector Chair** – Fred Holding

**Independent Sector Chair** – Derrick Everhart

**Proprietary Sector Chair** - Vacant



# Past Presidents

2023-24 Rachel Cavenaugh  
2022-23 Michelle Hemmer  
2021-22 Zilma Lopes  
2020-21 Kamesia House  
2019-20 Robert Muhammad  
2018-19 Jamie Pendergrass  
2017-18 Jason Johnson  
2016-17 Andrea Simpson  
2015-16 Joey Trogdon  
2014-15 Cathy Shell  
2013-14 Rachel Cavenaugh  
2012-13 Bridget Ellis  
2011-12 Kim Driggers  
2010-11 Paul Coscia  
2009-10 Lisa Koretoff  
2008-09 Amy Berrier  
2007-08 Tony Carter  
2006-07 Rance Jackson  
2005-06 Dana Kelly  
2004-05 Dr. Sharon Oliver  
2003-04 Bruce Blackmon  
2002-03 Rose Mary Stelma  
2001-02 Wanda White  
2000-01 Lisanne Masterson  
1999-00 Janet Nowicki  
1998-99 Larry Garrison  
1997-98 Kay Stroud

1996-97 William Cox  
1995-96 Dan Klock  
1994-95 Sally Dodd  
1993-94 Jane Kanipe  
1992-93 Joe Capell  
1991-92 Betty Whalen  
1990-91 Ann McAnear  
1989-90 Dolores Davis  
1988-89 Eileen Dills  
1987-88 Shirley Kool  
1986-87 Mary Garren  
1985-86 Steve Brooks  
1984-85 Louise Nowicki  
1983-84 Linda Yokeley  
1982-83 Carl Malpass  
1981-82 Jim Stanley  
1980-81 Jim Belvin  
1979-80 Clifton Collins  
1978-79 Patsy Braxton  
1977-78 Charles Holocmbe  
1976-77 Harlod Nixon  
1975-76 Gerald T. Bird  
1974-75 William Mackie, Jr.  
1973-74 Robert Boudreaux  
1972-73 Eleanor Morris  
1971-72 Lawrence Allen  
1970-71 William M. Geer  
1969-70 W.C. Blackwell



# 2025 Spring Conference Committee

Michelle Hemmer  
Tracy Rapp  
Lee Bray  
Hannah Golding  
Anita Elliott  
Rachel Cavenaugh  
Preston Dodson  
Emily Jarrell  
Shawn Henderson  
Adina Long  
Thomas Welch

Keats Ellis  
Nikki Glaspei  
Casey Wallen  
Crystal Johnson  
Jennifer Recendez  
Jane Knippenberg  
Lori Lewis  
Zilma Lopez  
Andrea Blount  
Audrey White  
Gwendolyn Brown  
Sherry Underwood  
Chelsea Gary



Debbie Brooks, Central Piedmont Community College

Nadine Ford, Durham Tech Community College

Kris Hopkins, Davidson College

Jane Kamiab, UNC - School of the Arts

Victoria Lenderman, Forsyth Technical Community College

Brenda Long, Carteret Community College

Frances Lundsford, Durham Tech Community College

Karen Walter, Elon University

Betty Woodall, Johnston Community College



# 2024-25 YEARS OF SERVICE

AWESOME

## FIVE YEARS

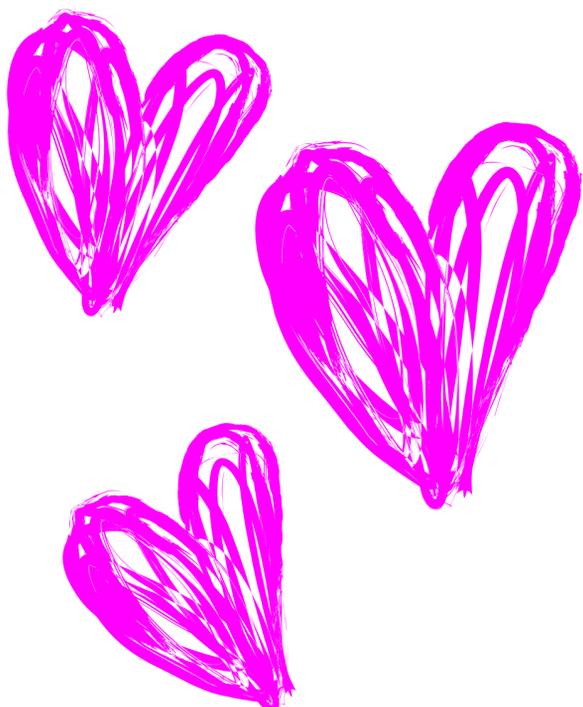
- |                   |                       |
|-------------------|-----------------------|
| Forrest Ambrose   | Peyton Lambert        |
| Colton Bailey     | Jacob Leonard         |
| Sarah Barber      | Adina Long            |
| Lori Becmer       | Jonathan Mador        |
| Selene Bomer      | Devon McCarthy-James  |
| Stephanie Bowles  | Ryan Mickey           |
| Kerri Bridges     | Wanjiku Njugwana      |
| Amanda Brown      | Dr. JuanEs Ramirez    |
| Cassi de la Cerda | Leslie Ruckdeschel    |
| Jami Dandridge    | Marie Ryczywot        |
| Becky Davis       | Judith Schram         |
| Charisse Dudley   | Selena Sebastian      |
| Emily Gallagher   | Crystal Shepard       |
| Chelsea Gary      | Joan Springett-Coscia |
| Anna Hoel         |                       |

## TEN YEARS

- |                   |                 |
|-------------------|-----------------|
| Rashonn Albritton | Tiffany Ingram  |
| Jennifer Archer   | Emily McLeod    |
| Carolyn Brandon   | Melissa Preslar |
| Laura Carter      | Elizabeth Sandy |
| Lauren Daniels    | Brandy Stewart  |
| Brian De Young    | Dana Strader    |
| Ciroria Drummond  | Tiffany Walls   |

## FIFTEEN YEARS

- Erin Conway
- Jennifer Hall
- Katie Herring
- Emily Jarrell
- Vanessa Jernigan
- Margot Runion
- Walter Simpson
- Christina Wallace



Thank you!



# 2024-25 *AWESOME* YEARS OF SERVICE

## TWENTY YEARS

Shannon Bain  
Donna Chandler  
Darren Chiott  
Sharon Davis  
Roselyne Dant  
Matthew Ellsworth  
Crystal Johnson  
Amy Killian  
Shannon Miles  
Traci Mitchell  
Ungina Perkins  
Angela Stone

## TWENTY FIVE YEARS

Edna Barker	Barbara Grimm
Belinda Brooks	Tammy Lester
Dawn Brumsey	Lori Lewis
Rachel Cavenaugh	Frances Lundsford
Christy Chesnut	Patrick Murphy
David Cooper	Sandra Norris
Jackie Copeland	Scott Orris
Paul Coscia	Betty Woodall
Karen Gibson	

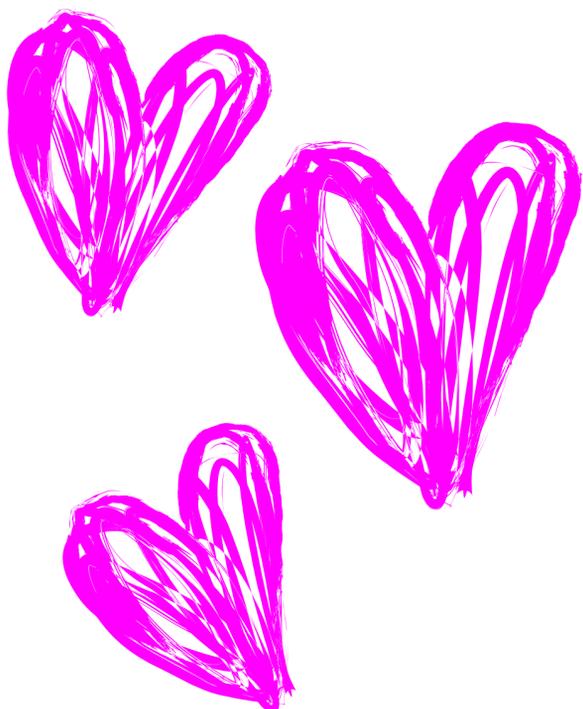
## THIRTY YEARS

Amy Berrier-Gerber  
Denise Hicks-Mial  
Lisa Koretoff  
Lynette Lorenzetti

## THIRTY FIVE YEARS

Jacqueline Alford-Hewitt  
Jacqueline Murphy

*Thank you!*





# ELEANOR S. MORRIS DISTINGUISHED SERVICE AWARD RECIPIENTS

1989 Eleanor Morris  
1990 Duffy Paul  
1991 Stan Broadway  
1995 Steve Brooks  
1997 Larry Allen  
1998 Curtis Whalen  
2002 Janet Sain  
2002 Bill Cox  
2003 Barbara McQueen  
2004 Rose Mary Stelma

2006 Joanne Carreras  
2009 Kay Stroud  
2012 Amy Berrier  
2014 Lisanne Masterson  
2016 Tolly Tollefson  
2017 Lisa Koretoff  
2018 Rachel Cavenaugh  
2019 Dr. Sharon Oliver  
2022 Dr. Wanda White

# AWARD OF MERIT RECIPIENTS

1995 Francine Reeves

1999 Betty Whalen

1999 Dan Klock

2002 Lisa Koretoff

2003 Dave Bartniki

2004 Elizabeth McDuffie

2006 Amy Berrier

2008 Bridget Ellis

2009 Jane Kanipe

2012 Robbie Schultz

2014 Anthony Jones

2016 Marcia Weston

2017 Melody Lawrence

2023 Cedric Barksdale



# NEW MEMBER AWARD RECIPIENTS

1998	Lisa Koretoff
1998	Ben Carey
2005	Cynthia Grant
2014	Jamie Pendergrass
2017	Mary Otto
2018	Frank Parrilla
2023	Hannah Golding





# STEVEN E. BROOKS PROFESSIONAL DEVELOPMENT SCHOLARSHIP RECIPIENTS

- |      |                    |
|------|--------------------|
| 2015 | Whitney McLaughlin |
| 2016 | Tyler Cook         |
| 2017 | Elena Koutouzos    |
| 2022 | Hannah Golding     |
| 2023 | Chelsea Gary       |
| 2023 | Valerie Clem-Brown |
| 2023 | Joseph Levister    |
| 2025 | Laura Scott        |





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**KEVIN HOLMAN**  
*Head of Campus Development - Midsouth Region*  
kholman@collegeave.com | 757.287.0393



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NCSEAA oversees programs that provide students and families with savings, scholarships, and loan options for education-related costs from cradle to career.

#### Higher Education

**Scholarships:** NCSEAA oversees over 10 scholarships and grants for students with financial need attending an NC college or university. The two largest programs are:



for NC public colleges & universities



NCSEAA  
NC NEED-BASED SCHOLARSHIP  
FOR PRIVATE COLLEGE STUDENTS

**Forgivable Loans** help qualified students going into high demand fields with critical labor shortages pay back their loan through service to the State.

**NC Residency Determination Service (NC RDS)** helps students demonstrate their NC residency to be considered for in-state tuition and state grants/scholarships.

**NC Assist Loan** helps residents and students in NC cover college costs with fixed rates and no added fees.

#### Savings

**NC 529** offers participants tax-advantaged savings toward a wide variety of qualifying educational expenses, including college tuition, books, fees, room and board and beneficiary student loan payments; CTE education expenses; K-12 tuition expenses, and more.

#### K12 Scholarship Programs

**Opportunity Scholarships** help pay for required tuition and fees at nonpublic schools.

**ESA+ Program** helps cover education-related expenses for students with a disability.



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<sup>1</sup> Nine-month grace period is not available for borrowers who choose our Principal and Interest Repayment plan while in school.

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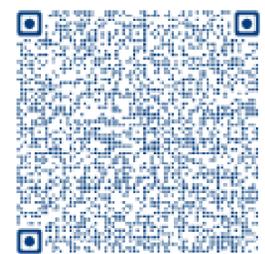


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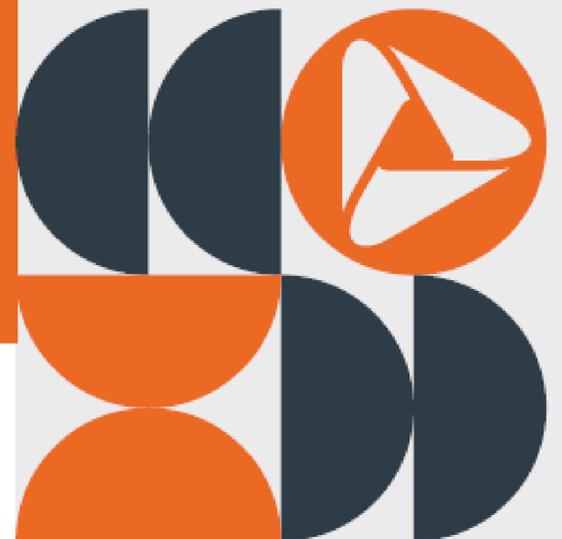
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