

Southern Association of Student Financial Aid Administrators



Moving Forward to a

New Reality

March 30 – 31, 2021

SASFAA's Inaugural

Director's Summit - Virtual

FULL AGENDA

*All times are EST

Tuesday, March 30, 2021

1:00 – 2:00 pm Welcome and Introductions Activity

2:00 – 3:20 pm Session #1 - Moving Forward TOGETHER: Serving our Institutions, Students, and Staff in a (Post?) Pandemic World

Presenters:

Dr. Joseph C. Richardson, Vice President of Student Affairs, Valencia College
Daniel Barkowitz, Associate Vice President of Financial Aid and Veterans Affairs,
Valencia College

Using a Case Study approach a college Vice President will explore the challenges of moving forward together in a (Post?) Pandemic world. How do we identify and address systemic inequities on our campuses? How do we develop Practices and Policies that reach towards equity?

While our move to online learning has caused us to reflect on who is unable to participate given the digital divide, it also should lead us to wonder who we were not serving *before* the pandemic.

Come learn why

- Calling campaigns and outreach MATTERS!
- Supporting ALL Staff and Students with robust virtual environments MATTERS! (Technology, Cyber Advising, Zoom etc)
- Strategic use of HEERF Funds to provide technology needed for remote learning and remote student services MATTERS!
- Institutions Moving Forward TOGETHER with Faculty and Staff MATTERS!
- Outcomes and ongoing assessment MATTERS!

3:20 – 3:30 pm Break

3:30 – 4:00 pm Keynote Address: Randy Boyd, University of Tennessee System President

4:00 – 5:30 pm Session #2 - Staffing and Budgeting from a Managerial Standpoint

Panel presenters:

Marian Dill, Director of Financial Aid, Lee University, TN
Dr. Sharon Oliver, Assistant Vice Chancellor for Scholarships and Student Aid,
North Carolina Central University
Lisanne Masterson, Director of Financial Aid, Blue Ridge Community College, NC

This session will explore two of the most crucial aspects of directing a financial aid office from a managerial standpoint – staffing and budgeting. We will explore how office job responsibilities and work flows were impacted and the questions we need to be asking moving forward – i.e. which will ‘return to

normal’ and which need to be reviewed and changed going ahead. A panel of experienced financial aid directors will highlight some of the areas they have addressed and then the question and answer period will break into small groups by institutional size for further discussion and brainstorming.

Staffing

- Have job descriptions changed (or need to change) due to ‘new’ normal of working remotely versus on-site?
 - Example, staff member managed in-person visits and telephone previously
 - Example, job responsibilities need to shift to ‘share the wealth’
 - Example, can all staff work remotely? What about those that need more ‘supervision’ or whose responsibilities do not meet changing needs?
- How have your work flows changed (or need to change)?
 - If some/most/all are working remotely, how do you manage a process that has several moving parts?
 - For those unable to work remotely (due to current responsibilities or needing supervision), how do you keep them engaged and active?
- How do you best reacclimate your staff to working back on site?
 - New safety protocols
 - Now back under more constant supervision and/or a timeline, rather than setting their own schedule

Office Budget

- How has your operating budget been affected and what changes need to be made moving forward?
 - Is there a change needed in your staffing (more, less or constant) and what does that justification look like?
 - Are budget cuts or hiring freezes an issue due to enrollment?
 - Are your current technology needs meeting the demand/situation?

5:30 – 6:30 pm Networking Activity/Social Hour

Wednesday, March 31, 2021

9:00 – 10:30 am Session #3 - Mind-Hack: Creating a Resilient Mind-Set

Presenter: Mauricio (Reese) Ramos,
Director of the University Ombudsman Office, Virginia Tech

It seems that storm after storm of global events, national news and changes in our own financial aid field make it seem almost impossible to manage our professional and personal lives. These are, after all, “unprecedented times.” The reality though is that despite the challenges we face we can still find balance and resiliency in these times.

In this session, we will learn about how COVID has affected the mental health landscape; the types of mental health issues that have arisen due to COVID and what professionals are seeing; how to recognize the signals in us and our staffs so that we can take care of ourselves to then take care of our staffs; and, tricks and tips, what I call “mind-hacks”, to help calm the storms.

10:30 – 10:45 Break

10:45 am – 12:15 pm Session #4 - Wealth, Inequality and Education Funding Models

Presenter: Dr. Thomas Shapiro, Professor, Brandeis University

In this evidence based presentation, Dr. Shapiro will present the topic “Wealth, Inequality and Education” based on research he and his team have done over the decade about the topic. There is no doubt there is a huge financial payoff in the acquisition of higher education in America. But at what costs? And are these costs spread equally across racial and social economic boundaries? As Higher Ed Administrators should we consider more than education’s prosperity potential? “Toxic” inequalities exist across America in both income and wealth. Does the decrease in public funding of higher education, the increased costs students and student loan debt factor into the wealth disparities that exist today?

In preparation for the presentation here is an article that may be of interest and aid you in the discussion: <https://heller.brandeis.edu/iere/pdfs/racial-wealth-equity/racial-wealth-gap/stallingdreams-how-student-debt-is-disrupting-lifechances.pdf>

- *Does wealth perpetuate inequality?*
- *How do educational choices and outcomes vary based on family resources?*
- *Do higher education funding models position individuals most marginalized for success?*
- *Does race and culture influence debt levels and default?*
- *What financial aid policies best align with social mobility imperatives?*

12:15 – 12:30 pm Break

12:30 – 1:20 pm Closing Session: An Update from Washington

Presenter: Megan Coval, Vice President of Policy & Federal Relations, NASFAA

1:20 – 1:30 pm Wrap-Up

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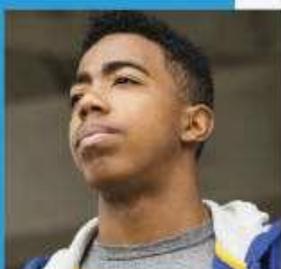
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And a very big thanks to the following individuals who helped with many of the Event's logistics!

Leah Louallen, SASFAA Treasurer
Zachary Christian and Jonah Miller, SASFAA Electronic Services Committee chairs



It Takes A Village

Speakers/Presenters

Daniel T. Barkowitz

Daniel T. Barkowitz is Assistant Vice President of Financial Aid and Veterans Affairs at Valencia College, a position he has held since July of 2017. He is the Immediate Past President of the Florida Association of Student Financial Aid Administrators (FASFAA) and is currently the Past Chair of the NASFAA's Commission of the Certified Financial Aid Administrator (CFAA) Program.

Daniel has served over 30 years in institutions of higher education. Previous roles include Director of Financial Aid at MIT, Dean of Financial Aid / Associate Dean of Student Affairs for Columbia College and Columbia Engineering at Columbia University in the City of New York, Director of Operations and Training for the Massachusetts Educational Financing Authority, and Assistant Director of Financial Aid at Boston College.

Daniel earned his Bachelors of Science in History from Northeastern University and his Masters of Education in Human Resource Education from Boston University. Daniel has led presentations on Financial Aid and College Financing to many audiences (more than 500) ranging in size from 2 to 2000. He has been interviewed for television, radio and newspapers on the topic of financial aid.

Daniel has two adult children and lives with his wife and two fur babies in Orlando. Daniel is a published poet, musical theater actor, and Tarot card collector. He promises an enjoyable and informative presentation.

Randy Boyd



Randy Boyd was appointed president of the University of Tennessee by the UT Board of Trustees March 27, 2020, following a sixteen-month period as interim president. Boyd took office Nov. 22 following the retirement of UT President Joe DiPietro. As UT's 26th president, Boyd serves as the chief executive officer of a statewide university system. The flagship campus in Knoxville includes the Space Institute in Tullahoma and the statewide Institute of Agriculture. The UT System also includes campuses in Chattanooga and Martin; the Health Science Center in Memphis; and the Institute of Public Service. The UT System manages Oak Ridge National Laboratory through its UT-Battelle partnership.

Boyd is the founder of Radio Systems Corp., a Knoxville-based business. They have more than 800 employees, offices in six countries and produce pet related products under the brand names PetSafe, Invisible Fence and SportDOG. He also serves as chairman of Boyd Sports and is the owner of the Tennessee Smokies, Johnson City Cardinals, Greeneville Reds and Elizabethton Twins and part owner of the Memphis Redbirds.

Boyd served as chairman of the Tennessee Higher Education Commission and as commissioner of the Tennessee Department of Economic and Community Development. He was a founder and co-chair of the Governor's Rural Taskforce, which exists to help state government and industry leaders find solutions to the biggest challenges facing rural Tennessee.

Boyd also served as Gov. Bill Haslam's special adviser for higher education. He was the architect for Tennessee Promise and Drive to 55 and was the founder and chairman of Tennessee Achieves—all initiatives aimed at increasing the number of Tennesseans with post-secondary degrees to 55 percent by 2025 and decreasing financial hardship for Tennesseans pursuing degrees.

Through his philanthropy, Boyd also supports the Boyd Center for Business and Economic Research and the Anderson Center for Entrepreneurship and Innovation's Boyd Venture Challenge seed grant program for student entrepreneurs, both through the Haslam College of Business at UT Knoxville.

Boyd is the first in his family to graduate from college. He earned a bachelor's degree in business with an emphasis on industrial management from UT Knoxville. He also earned a master's degree in liberal studies with a focus on foreign policy from the University of Oklahoma.

Boyd and his wife, Jenny, live in Knoxville. They have two children and two grandchildren.



Megan Coval

Megan is the Vice President of Policy and Federal Relations at the National Association of Student Financial Aid Administrators (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 Penn State University. She received a master's in higher education at Penn State and BA in political science from Allegheny College.



Mauricio (Reese) Ramos

Through personalized coaching and guidance, Virginia Tech University Ombudsman Reese Ramos strives to empower Hokies to navigate beyond problems to options that may resolve their situations. He also offers training in conflict resolution, personal & professional development and communication strategies.

Reese is an active member of the International Ombudsman Association (IOA) and has been a past IOA Board President. He has facilitated ombudsman trainings at previous conferences and has written dozens of articles on leadership, conflict management and communication.

After graduating from Pepperdine University with a Bachelor of Arts in Liberal Arts, he completed a specialized 15-unit certificate program in dispute resolution at Pepperdine School of Law's Strauss Institute for Dispute Resolution. He then earned his Juris Doctorate from McGeorge School of Law. He has supplemented his extensive education with several hundred hours of mediation, negotiation, arbitration and diversity training.

Prior to joining Virginia Tech, Reese has also worked as an Ombudsman with the National Park Service, Earthjustice, Sandia National Laboratories and the University of California, Los Angeles (UCLA). In the past he has also been a mediator with Marin County Mediation Services and was in private practice, where he mediated disputes for Mosten Mediation Centers, the Los Angeles Superior Court, Voluntary Mediation Services, the Centinela Valley Victim-Offender Restitution Services and SquareTrade, an on-line mediation internet company.

Reese states, "One of my goals is to help people see the situation (problem, conflict, question) *as it is* and then to help them focus on *how it could be*. In other words, what needs to change and how do we go about creating that change? In the end we are all "response-able" and empowered to change how we relate to *any* conflict."

Joseph C. Richardson, Ph.D., PMP

Dr. Joseph C. Richardson currently serves as the Vice President, Student Affairs at Valencia College in Orlando, Florida. In this position, he provides senior leadership for the development, implementation, assessment, and oversight of student services at the College. He leads the development of systems that meet the needs of a diverse student population and enhances student learning, persistence, and completion. He collaborates with vice presidents and campus presidents to develop, maintain, and assess the coordinated delivery of essential student services that lead to positive student learning outcomes, including admissions, new student orientation, registration, financial aid, student records, advising, testing and assessment, counseling, student recruitment, enrollment management, Veterans affairs, student employment, student development, services to students with disabilities, and student conduct. He collaborates with the Vice President-Academic Affairs and Vice President-Analytics and Planning to ensure a seamless student experience from inquiry and application through enrollment, persistence, and graduation. Previously, Dr. Richardson worked as the Executive Director of Veteran Support at the Georgia Veterans Education Career Transition Resource (VECTR) Center as part of Central Georgia Technical College in Warner Robins, Georgia.

Dr. Richardson was born in Chicago, Illinois and spent most of his childhood growing up in Lima, Ohio. He is an honorably retired U.S. Air Force Lieutenant Colonel having served as an aircraft instructor and evaluator navigator/defensive systems officer onboard the KC-135, EC-135, and E-8C JSTARS, completing over 3,500 flight hours with combat tours over the skies of Kosovo, Iraq, and Afghanistan. He has taught at the technical college, undergraduate, and graduate degree levels and has held leadership positions at the U.S. Air Force Academy, Mercer University, Middle Georgia State University, and Central Georgia Technical College.

Dr. Richardson completed his undergraduate degree at the U.S. Air Force Academy, and received a Master's Degree in Aeronautical Science from Embry-Riddle Aeronautical University and a Master's Degree in Counseling from the University of Colorado-Colorado Springs. His Doctor of Philosophy degree is in Educational Leadership from Mercer University. Dr. Richardson has also completed the Harvard

Graduate School Institute for Management and Leadership in Education and is a certified Project Management Professional (PMP) with the Project Management Institute.

Prior to moving to Florida, Dr. Richardson resided in Georgia where he served on the Board of Directors for the Robins Regional Chamber of Commerce, Houston County Development Authority, and Warner Robins Convention and Visitors Bureau. He also served on the Board of Advisors for the Houston County Career Academy. Currently, Dr. Richardson serves on the Board of Advisors for the Greater Orlando Sports Commission.

He and his wife Felicia of 25 years are the proud parents of three wonderful children, son Ryan (deceased), daughter Lyndsay (24—a graduate of Columbus State University, Georgia and Middle School Chorus teacher in Warner Robins, Georgia) and son Nathan (19—a freshman at Kennesaw State University, Georgia). He enjoys reading, playing basketball, recording voiceovers and audiobooks, and competing with family and friends to maintain 10,000 steps/day on his pedometer.

Dr. Thomas Shapiro

Professor Thomas Shapiro is the David R. Pokross Professor of Law and Social Policy at The Heller School for Social Policy and Management, Brandeis University.

Professor Shapiro's primary interest is in racial inequality and public policy. He is a leader in the race and wealth field with a particular focus on closing the racial wealth inequalities. *Toxic Inequality*, 2017, was published by Basic Books; *The Hidden Cost of Being African American: How Wealth Perpetuates Inequality*, published by Oxford University Press, 2004 (soft cover, 2005) was widely reviewed, including by the *Washington Post*, *Boston Globe*, and others. The book was named one of the Notable Books of 2004 by *The St. Louis Post-Dispatch*. With Dr. Melvin Oliver, he wrote the award-winning *Black Wealth/ White Wealth*, which received the 1997 Distinguished Scholarly Publication Award from the American Sociological Association. This book also won the 1995 C. Wright Mills Award from the Society for the Study of Social Problems, and the Gustavus Myers Center for the Study of Human Rights in North America named it an Outstanding Book of 1996. A Tenth Anniversary Edition of *Black Wealth/White Wealth*, with two new chapters that examine the most important changes in racial inequality and developments in asset policy in the past decade, was published in 2006. *Great Divides: Readings in Social Inequality in the United States*, 3rd edition, was published in the summer of 2004.

His media appearances include *Tony Brown's Journal*, *The Tavis Smiley Show*, *Talk of the Nation*, CNN, and *On Point*. His work has been reviewed or discussed in *The Washington Post*, *The Boston Globe*, *The American Prospect*, *The Chicago Sun-Times*, *The St. Louis Post-Dispatch*, *CommonWealth Magazine*, *Newsweek*, *The Village Voice*, and others. Dr. Shapiro presents lectures and seminars throughout the United States to general, professional, policy, community, foundation, and university audiences. He teaches seminars in *Assets and Social Policy*; *The Sociological Inquiry of Inequality*; and *Qualitative Research Methods*.

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