

# NASFAA's "Off the Cuff" Podcast – Episode 267 Transcript

## OTC From the Field: NASFAA Conference Preview

Justin Draeger:

Hey everybody, this is Justin from NASFAA. Before we get into today's episode, wanted to mention two Supreme Court opinions that we're waiting for. One is SFFA versus UNC and SFFA versus Harvard. This one's dealing with the use of race in admissions and scholarships. The other one is Biden versus Nebraska and the Department of Education versus Brown. And this is dealing with the validity of student loan debt forgiveness from President Biden. The Supreme Court, or as we refer to as SCOTUS inside the beltway here, we are expecting them to release an opinion on this any day, and especially before the end of the month. They did not release one today, Thursday, June 15th. They could release one tomorrow, Friday, June 16th. They could release one or both of these opinions next week.

As soon as they do, we will of course let you know through Today's News and we'll keep you informed. We have a webinar already on the books next month in July, discussing race in admissions and in financial aid based on the decision that will be reached in the Supreme Court. Just wanted to let you know that we will not be talking about this in today's episode, but we do have a comprehensive communications plan to keep you all in the loop in the latest legal opinions coming out of the Supreme Court. And with that, let's get into today's episode. Hey everybody, welcome to another edition of "Off the Cuff". I'm Justin Draeger.

Dana Kelly:

I'm Dana Kelly, vice president of professional development and institutional compliance.

Kristi Jovell:

And I'm Kristi Jovell, director of student financial services, operations, and communications at Middlebury.

Justin Draeger:

Great to have you here, Kristi and Dana, we're really glad to have you on the podcast. Dana, have you been on the podcast before, Dana?

Dana Kelly:

Maybe once, if I'm remembering.

Justin Draeger:

Okay. Well, glad to have you on. For people who don't know, Dana Kelly is sort of like our... She's been around at a lot of different conferences at states and regions, but Dana oversees everything from AskRegs knowledge base, which of course we get thousands and thousands of hits and inquiries on every single month, to our credentialing program, to our certification program, to all of the rules and regulations that we're helping people sort through on our webinars. So everything that has to do with regulatory compliance. Kristi, you have worn a lot of different hats in the NASFAA volunteer structure, not to mention your state and ISFA, your region. Kristi, you've also this year been our program task force

chair for our annual meeting, and that's the capacity we've invited you on here today. So thank you very much for joining us.

Kristi Jovell:

Thank you for having me.

Justin Draeger:

Yeah, happy to have you. How many NASFAA conferences do you think you've attended over the years?

Kristi Jovell:

Oh, my first one-

Justin Draeger:

And before you answer, I want you to know I have the answer in front of me. I looked up your membership record before we started and I counted how many conferences you've been to, including the first conference you ever attended. So go ahead. I wanted you to know that.

Kristi Jovell:

First one, Salt Lake City.

Justin Draeger:

That's correct. Yeah, do you know what year that was?

Kristi Jovell:

2013?

Justin Draeger:

No. No, actually you're off by quite a bit.

Kristi Jovell:

Oh, yeah, yeah. It would have to be way earlier.

Justin Draeger:

Yeah, close. You've got like two digits correct.

Kristi Jovell:

Sorry, 2003.

Justin Draeger:

That's right. You were off by a decade.

Kristi Jovell:

I cut a whole decade off.

Justin Draeger:

You tried to X out 10 years of your life there, but yes, 2003.

Kristi Jovell:

I prefer to do that with my age, so thank you very much for noticing.

Justin Draeger:

Right, right. 2003, that was your first conference, Salt Lake City. That's right.

Kristi Jovell:

I'm going to say number 15.

Justin Draeger:

Actually, you've been to 17 NASFAA conferences. This will be your 18th, it would've been your 19th had we not canceled our conference in 2020, but because of the pandemic. So this will be your 18th NASFAA conference. I mean, that's pretty impressive in terms of continuity from 2003 to 2023, given the fact that we took out... I don't even remember. Did we lose two or three conferences in that timeframe too? So if there's a continuity award, which there isn't, and if there was a medal for it or a monetary prize, which there also isn't, you could be in the running.

Kristi Jovell:

Well, it just goes to show how qualified I am to be the task force chair, right?

Justin Draeger:

That's right. And if anybody out there puts in 20 years almost, you too could have a lot of voluntary work in your future. Okay. So tell people what does it mean to be the task force chair of this committee, of this task force? And if people are interested in not being the chair, but even being on it, what does this task force do and how does it interact with our conference that's coming up here in two weeks?

Kristi Jovell:

Right. Well, it was a great experience and I think being chair, first off, I have to thank National Chair Brad Barnett for giving me the opportunity and Brad and I first talked about this over two years ago because you come on and you serve for one year as the incoming chair and you serve them the next year as the chair. So it is a bit of a commitment, but it gives you the opportunity to watch and learn in that incoming chair year. And for me, when Brad first approached me about it, again two years ago, but we knew then that FAFSA Simplification was going to be big, and we got excited about it, and we knew that based on the timing of the conference and what we knew would be coming down the pike that it would be an important year. And that's proved to be true.

So I was really excited to have the opportunity to bring that information to the members at this time. But what the committee does is we meet. It's one in-person meeting. We start in October and it's getting great sessions in your region, getting people to not be shy and to submit conference proposals. Then the committee reviews all of them. So we do our work. The committee does that individually. And then we all come, we came to DC this year in December. Everybody reviewed these sessions. We had over, I think it was, and Dana will correct me if I don't have it right, over 150 session proposals that we needed to winnow down to try to put together a great conference program of 50 sessions using the

broad mix of everybody's needs. Everybody's needs are different as a financial aid administrator and everybody's institutions are different. So how do we bring lots of diverse presenters and voices and sessions to the conference?

Justin Draeger:

Yeah. And that's a pretty tall order for the task force to do because we get so many quality session submissions.

Kristi Jovell:

Without a doubt.

Justin Draeger:

Yeah. You sort of start with these broad objectives and you already know going in that we have FAFSA Simplification, which is sort of the one topic that's keeping everybody up at night. On top of that, we also have really big sort of challenges in front of us with return to repayment. We have the ongoing policy issues of regulatory reform, so lots of new regulations on the docket, everything from gainful employment to new standards around administrative capability, which are really wide and broad and have a lot of depth to them.

And then you just have the day-to-day best practices and standards and innovations that eight administrators want to stay on top of. You have vendor and corporate partners that are bringing innovations to the marketplace that we want to highlight. And you have to balance all of this and try to get it down to a program that is going to bring forth the best for our attendees. And I should add, we have 2,600 right now attendees, roughly. That's our biggest conference in over 15 years. So this is going to be a really big conference, a really great conference. And how do you feel, Kristi? Have we done it? Have we brought forth the best sessions we can?

Kristi Jovell:

I think so. I was so lucky. I had the best conference committee, and of course we have Dana and Jennifer and Debra and the NASFAA staff helping us, and I think it's really good. We obviously have to have a lot of sessions around FAFSA Simplification, but like you mentioned, Justin, there is... I mean, we already addressed my length of tenure in financial aid, so let's also address the fact that there is more going on now than I think there has ever been throughout my career.

And so the challenges to bring a diverse plate of sessions to the conference are there, but you've got to focus on the FAFSA Simplification, but it's also serving students. Our students are sent post pandemic. Students are changing in what they need and how they're showing up to us, and it's those best practices, learning all the tips we can from our colleagues in order to serve students the best way that we can and while also taking care of our own staff. I think some of the sessions that you're going to see are kind of about the care and keeping of your team and how do you do that in a hybrid world for many people, but still keeping your offices full, keeping your staff motivated while we're in one of the most challenging I guess, but that might be a negative connotation word, times in our profession where there is so much coming at financial aid administrators in terms of their own institutions and all those things, Justin, you mentioned on the topic.

Justin Draeger:

I don't think it's wrong to say challenging at all. I think it's acknowledging the reality that a lot of folks feel on campus. We know that offices have struggled to retain talented staff. Sort of the shift between employer employee relationships for the last couple years, particularly coming out of the pandemic. Employees are mobile. They have been shifting and voting with their feet. And we've had retention issues, we've had open positions, and maybe we're starting to see a shift, but this has been an issue and now we're dealing with onboarding of an entirely new federal methodology, a new FAFSA form, onboarding repayment, significant sort of changes in the regulatory realm. There are serious challenges. All right, Dana, let's go to you. We also have our federal partners that'll be joining us, the Department of Education. We have the GAO that will also be at our conference. Let's talk about our federal partners and how they'll be participating at our conference this year.

Dana Kelly:

Oh, well, FAFSA Simplification is the name of the game, and it's certainly the theme for this conference. Something that is a little different is that we are going to feature the Department of Education in three of our general sessions. So starting on the 30th, the first and the second, first thing every morning we will have the department in, we'll start with FAFSA Simplification. Then on the Friday morning, it will be a federal update per normal, and we'll also have some words from the chief operating officer, Richard Cordray from the department, and then we'll wrap up the conference with a deep dive into the SAI and what that is looking like.

So definitely different to have the department featured in all of our general sessions, but we are very, very glad they are going to be with us. Certainly a historic time for student aid, and we think we got the bases covered. Also, we're going to have back for the first time in quite a while, Ask A Fed will be in our exhibit area. So we hope everyone will come with their questions. Getting the chance to be face-to-face with the department is more rare than it used to be. So again, we are thrilled to have the opportunity to provide this access for our members.

Justin Draeger:

Yeah. This is along the vein of partnership, and I know from day to day as the department is sort of ramping up, at the same time they have budget constraints so they can't always get out to all of the financial aid conferences. We haven't had an in-person FSA conference in a number of years since before the pandemic. We don't know that there's one on the immediate horizon. They've introduced things like secret shopper programs to provide more oversight. They have sort of a new shop that's sort of doing investigations on campuses. So they've certainly embraced their oversight responsibilities. From day to day, an aid administrator is wondering where's the balance between partnership and oversight?

These sort of interactions that we have at our conferences is where we really try to narrow in and focus on this partnership. Those conversations that you have with the department face-to-face where you can build relationships and sort of explore what is sometimes the gray areas of federal rules and regulations when it comes to our students. Not everything is sort of a stark line about what is on this side of this line and what is on that side of the line? So these conversations are really important. We're really glad that they're going to be engaging with our members at this conference. Kristi, let me come back to you and talk. What are some of the breakout sessions that you're most looking forward to?

Kristi Jovell:

Breakout? Well, first, before I even go there, I'll say I'm really excited about the Ask A Fed. That is, as you mentioned, how many years I've been coming to conferences. So this is a nice one to come back and we

haven't had it in a while, and I personally have my list of questions. We're starting a new program and I am ready. Whoever their program eligibility specialist is that's going to be there, I am going to be front and center with my questions. Interest sessions that I think are top of mind for me. Certainly we've talked a lot about FAFSA Simplification. Why there's so many FAFSA Simplification sessions on the agenda is because it's different kinds. It's about the new FAFSA. It's about the new SAI. It's about how do we communicate with students about all the changes coming? So there's certainly some depth in those sessions.

And then in terms of the interest sessions by colleagues, I'm looking forward to the... There's an emergency aid session for emergency aid for students post COVID that I think will be a really good one. Personally, I need to step away from FAFSA Simplification a bit and think of loan repayment, pause ending and how do we transition our borrowers there? So there's a good session from some good colleagues there that I'm looking forward to going to. But there really is a lot and I find that when I look at the agenda, I'm like, oh, do I go to this one or do I go to this one? So lots to choose from for everyone.

Justin Draeger:

Thanks, Kristi. How about you, Dana? Any breakout sessions you're most looking forward to?

Dana Kelly:

Yes, and no bias here at all, but it's actually one you're doing, Justin.

Justin Draeger:

Oh, yay. Yes, extra points.

Dana Kelly:

Yeah.

Justin Draeger:

Just so people know, we've already done our performance evaluations at NASFAA, so Dana doesn't get any bonus points for this.

Dana Kelly:

Artificial intelligence is such a hot topic now across all, I mean, all facets of life. So the fact that you and Daniel Markowitz are doing a session on ChatGPT and artificial intelligence, I am super excited. I think it's the next thing. It's going to impact us all. So I am looking really forward to what you all are going to talk about in that session.

Justin Draeger:

Yeah, I'm excited to do that session. It fits into a theme that I'm going to try to tackle in a couple breakout sessions. Our Inside The Beltway session's going to be a little bit different from how we've done it in the past. One, it's not a general session. We did give up our general policy session that we normally do to the department to focus on one aspect of FAFSA Simplification. So if you're doing a drinking game based on how often we say FAFSA Simplification, you're probably good and drunk by now. But we did give that up. We're doing it as a breakout session. We're doing that session a little differently, and it's under the theme of the future of the profession. ChatGPT in the AI session that we're

doing that Dana just mentioned and Inside The Beltway, we're framing this in a little bit about how you should be thinking about your aid office and the profession as we move into the future.

And this is something I think a lot about because I do think as a profession and as an aid office, we should be thinking about how we are fundamentally changing in the next couple years. And I do think the way that we now have regulation coming out every single year, and I mean significant regulation and sub-regulatory guidance, we're going to talk about that in our Inside The Beltway session and how an aid office I think should be positioning itself differently than how we've positioned ourselves previously, not just within the university, but how we should be restructuring ourselves. It's no longer about every couple years we have new regulation, we should be digesting it and how do we implement it? We ought to be thinking about dedicating ongoing consistent resources to just be digesting new guidance. It is consistent, ongoing, constant. So we're going to talk about that in our Inside The Beltway session.

We're going to be talking about artificial intelligence and how that can help us do analytics, processing, fraud prevention, and just day-to-day routine tasks in the aid office and which parts of our professional lives maybe are most at risk, or if you're looking at the upside, opportunity to be outsourced to machine learning or large language modeling. So anyway, we'll talk a lot about that. We also have some sessions on homelessness and basic needs that we're really looking forward to. I'll say that sometimes folks may not recognize, we do a lot of meetings sort of offline at our conference too. A lot of business gets done. Some of us will be meeting with software providers at this meeting and talking about their capabilities around FAFSA Simplification, also aid offers. So there's a lot of stuff that gets done in our conference, really looking forward to it. We should shift for a second though, and not forget to talk about the fun. So Dana, why don't you catch us up? What's some of the fun stuff happening in our conference and fun stuff people can do in San Diego?

Dana Kelly:

Well, fun I would say starts in Innovation Hall. We want that to be not only a place for networking and not only a place to get business done, meet with your corporate partners and make sure you're getting those needs taken care of, but we've got some fun things in there. We've got a coffee shop that will have entertainment happening at different times. We've got a professional headshot booth, so our conference is business casual, but if you want to bring that suit and get your picture taken, it's a great opportunity to do so. We have selfie stations, we have a lot of photo ops built in throughout, both inside Innovation Hall and outside in the conference area in general. We have a relaxation lounge where you can get a chair massage where you can just sit down and relax, charge your devices, and a gaming lounge.

So lots of fun to be had in Innovation Hall. I am also really, really excited about dueling pianos. If you've never been to a dueling piano bar, we are kind of recreating that outside. Knock on wood. San Diego will continue to give us the wonderful weather we anticipate and we'll all be outdoors for a dueling piano event with some heavy hors d'oeuvres. So some good food to go along with that. Fun in and around San Diego. We are right there at the Gas Lamp District. So all kinds of restaurants, all kinds of opportunities for nightlife, all walkable. We're also right there on the bay. If you are a runner, I hope you're participating in our 5K charity run walk. And even if you're not a runner, it's beautiful. It's a beautiful route just to take a nice walk and we would love for you to do that.

Let's see. I don't want to forget anything. Oh, we're going to have an animal interaction. I think this will be the first time NASFAA has had animals as a part of our event, and that's also going to be tied to our charity, which is Students Without Limits. So we are looking to support at risk students in the San Diego area through all of our charity initiatives. So a lot of fun to be had. And the best part is we will all be together and we'll be able to do this with our friends and colleagues. So looking really forward to it.

Kristi Jovell:

Yeah, and I'll add one thing too. The choir, the NASFAA choir is coming back.

Dana Kelly:

Yes, yes.

Justin Draeger:

Are you singing in the choir, Kristi?

Kristi Jovell:

Luckily for all of you, I am not.

Justin Draeger:

Me neither.

Kristi Jovell:

You have to know where your tailwinds are and maybe where you should step aside and let others shine, right? I am ready to step aside.

Justin Draeger:

Okay. All right. So let me turn to just a few practical things here. So for folks, the other thing that's maybe surprising at this conference is the last numbers I looked at, there were about 950 and climbing first time attendees at this conference. So if you're doing the math, we're talking about somewhere around just over one out of every three attendees at this conference, this will be their first NASFAA conference. That's a pretty high number, and that's consistent with last year. I think these are high numbers after a pandemic, some turnover in our profession. So if this is your first NASFAA conference, what advice do you have for packing lists, Kristi? You're a veteran of these conferences. What are people should be packing? What should they be thinking about as they come for their first NASFAA conference?

Kristi Jovell:

Well, pack light, except I don't follow that one, right? Try not to check a bag. Those are some of my favorites.

Justin Draeger:

Can you really get by at this many days without checking a bag? If you can, I mean, I'm serious, I want to learn. I'm all for not checking bags, but I can't get away with that on this many days.

Kristi Jovell:

I am bringing my kids and we're staying extra days, so there is absolutely no chance. And with a 16-year-old daughter, she's going to have her own checked bag, right? But in general, shorter trips or if you're able to do it, that would be great. You know what it is? The liquids. I have a hard time limiting my liquids.

Justin Draeger:



I see. So pack light.

Kristi Jovell:

Yeah, pack light.

Justin Draeger:

Any advice on shoes? Are we going for style or comfort here?

Kristi Jovell:

That's a tough one. Younger self, style. Now that I have made many, many NASFAA conference, maybe a little bit of both.

Justin Draeger:

Okay. All right. I say go for comfort. That's just Justin Draeger speaking here, but I'm not for blisters in any form whatsoever. And the conference center is large and you have to get to it from any of the hotels, which are all conveniently located. However, there's a fair amount of walking and getting about. Is that fair, Dana?

Dana Kelly:

Absolutely. Yeah.

Justin Draeger:

Yeah. Dana, any advice for packing?

Dana Kelly:

Again, comfortable shoes and even I think more than one pair of comfortable shoes. Sometimes just switching off helps. I would bring a water bottle, although we are going to have those for you in our registration area as well. But you want to stay hydrated, so make sure you're keeping a water bottle around. Certainly hand sanitizer, I don't get on a plane without it. Of course, certainly now, I didn't before the pandemic, so now it's even more important. Let's see. I think cross body, if you tend to carry something with your belongings, I would make sure it's cross body or that you have pockets so that you keep your hands free. Those would be my recommendations.

Justin Draeger:

And then I might just add, make sure folks, keep your eyes open for the conference app. You'll want to download that. That has all the information that you need and has features so that you can stay in touch with other conference attendees. If you're a person who likes to do business cards, make sure you bring some so that you can network or be willing to share your information with other people. Part of this is about building relationships and making new acquaintances. 2,600 is a fantastic number. Of course, our daily newsletter goes out to like 26,000 NASFAA members. For those who can't attend in person, Dana, give us the details on the virtual conference, the dates, and then Kristi, maybe you can talk to us a little bit about some of the sessions at that conference.

Dana Kelly:

Sure. We will have our virtual event the week of July 10th. So right after your 4th, take your vacation 4th of July week and then come back and join us for the virtual conference. It will run Monday through Friday. We are taking a break to not conflict with Department of Education. So we had had a scheduled session that was going to overlap. We have corrected that. So you can do both in that week. And again, I hope everybody will take advantage. We're going to have, again, Department of Ed representation in that event. Kristi, what are some of your favorites for the virtual lineup?

Kristi Jovell:

Well, certainly, like we've said in the drinking game, you can have another drink, FAFSA Simplification. We can't miss that. There's representation from the Department of Ed. One of the sessions that I'm really looking forward to is called the Power of Nudge where little nudges for students can have a big impact on behavior. And I believe in that and I'm really looking forward to that session.

Justin Draeger:

So people can tune in for all the virtual. And we should point out those are institutional registrations, not individuals. So if your institution purchases a registration at the virtual conference, everybody will have access on your campus to those virtual sessions. So register for that today. One final note is that for all schools who claimed the NASFAA learning credit this last year, those credits can be used up until the end of this academic year or NASFAA's fiscal year, which is June 30. You can use those for a registration at the NASFAA conference, or you can use those for a registration at our virtual conference. But those will not be available after the end of this month. So please, if you have those still outstanding, please use those today. We want members to utilize those, but those will not be available after this month. Before I wrap up and we wrap all of this up, I just want to say, give us a chance to circle back around, we have some really amazing pre-conference content for those who might be there a little bit early. Dana, can you talk to us about the pre-conference activities?

Dana Kelly:

Absolutely. We will kick off the 29th with a in-person credential training on professional judgment. We will also have the first-timer event. We mentioned a lot of first-timers coming, so they're going to have a special activity and reception happening for them that day. And we have a diversity event, which we are also looking very, very forward to. So a lot happening really. And we kick off that morning with the 5K. So it's really a jam packed day from start to finish, and I hope everybody will take advantage of those pre-conference opportunities as well. They come with your registration. There's no extra cost there.

Justin Draeger:

Well, we are really looking forward to our in-person event in San Diego in two weeks. Kristi, a big thank you to you and your entire task force for all the work that you put in to make this happen. Thank you so much for coming along on this journey, and we're really looking forward to seeing the fruits of your labor.

Kristi Jovell:

Oh, thank you. I'm excited. The conference committee, the task force is excited. It'll be great.

Justin Draeger:

Dana, thanks to you and your team and all the NASFAA staff who are going to be on site and all the folks who've put in so much work beforehand and while we're there and after to make this a great event, it's going to be great to be in person with so many of our friends and colleagues.

Dana Kelly:

It will. It's our Super Bowl. We'll have a good time.