

NASFAA 2025 Leadership Conference Task Force

August 2024



Timeline & Commitment

Start date: August 2024

End date: February 2025

We anticipate that all planning can be conducted virtually, except in limited circumstances that fit within budget constraints. Each leadership pathway **chair** will attend the conference at NASFAA's expense. Task force **members** will have registration fees waived, but travel costs will be their own responsibility. Attendance at the event is not a requirement for task force participation.

The conference will be held February 9-12, 2025, at the JW Marriott in Washington, D.C.

Composition

Pathways:

Strategic Enrollment Management	Financial Aid Management & Leadership	Compliance Management	Association Leadership	FAAC® Forum
2025 Chair: Shelby (Smith) Maguire	2025 Chair: Heather Boutell	2025 Chair: Chad Olson	N/A	2025 Co-Chairs: Craig Slaughter & Jessica Flogaites
Members: TBD	Members: Josephine Cassar Jackie Copeland Joe Dobrota Edgar Martinez Lindsey Campbell Mary Saucedo Mason White	Members: TBD	Members: Beth Maglione Helen Faith Kristi Jovell Heidi Carl Sydney Evans	Members: TBD
2026 Chair: TBD	2026 Chair: Alex Delonis	2026 Chair: Angela Karlin	N/A	2027 Co-Chairs: TBD

NASFAA Staff Liaisons: Dana Kelly, Jackie Cottom, Margot Manning

Background & Purpose

In 2016, the NASFAA Leadership & Legislative Conference & Expo had three separate pathways:

- 1.) **Association Management**, which has trained current and future state and regional association leaders on the legal duties and best practices of managing their associations for many years.
- 2.) **New & Aspiring Aid Directors**, which was introduced in 2015 and is focused on growing and expanding important management and leadership skills needed to run a financial aid office efficiently and effectively.
- 3.) **Enrollment Management**, which established a foundation for aid administrators on how to develop well- planned strategies and tactics to shape the enrollment of an institution to meet established goals.

Each pathway at the conference was independent in terms of breakout sessions, goals and desired outcomes. However, general sessions and meals allowed for networking between all participants.

In 2017, Enrollment Management was broken into two defined pathways:

- (1) **Foundations of Enrollment Management**
- (2) **Strategic Enrollment Management**

The 2019 Expo developed a new pathway, **Advanced Topics in Financial Aid Leadership**, replacing the Foundations of Enrollment Management pathway. This new pathway provided experienced aid administrators insight into advanced principles in leadership and management. The remainder of the pathways moved forward as they had in past years with Association Management, Aspiring and New Directors, and Strategic Enrollment Management.

Since 2019, various pathways have been added, refreshed, or eliminated based on the anticipated needs of the attendees. **Strategic Enrollment Management (SEM)** and **Association Leadership (AL)** pathways have remained consistent due to persistent high demand. In 2020, Association Leadership became the responsibility of the National Chairs and NASFAA staff. We added the FAAC® Forum in 2022 as a pilot, and it was added as a full pathway in 2023. Pathways are evaluated annually to meet current needs.

Indicators of Success & Outcomes

The Leadership Conference will have two full days of high-quality educational sessions that develop or enhance the skills of aid administrators with regard to the pathway options presented. Advocacy efforts are encouraged on day 3 including a debrief with NASFAA staff to round out the event.

Task Force Members' Duties & Responsibilities

Association Leadership Pathway

NASFAA Staff and National Chairs:

- Utilize established curriculum to build the pathway program
- Update established curriculum where necessary to reflect overall best practices
- Assign speakers to create an exceptional attendee experience
- Work with the Conference Manager to remain within budget regarding speaker and travel expenses

Strategic Enrollment Management Pathway

Chair and Task Force will:

- Develop program sessions that identify enrollment management strategies using fiscal management and ethics, tactical methodology and collaboration beyond the financial aid to achieve specific enrollment goals.
- Curriculum will be geared to the practicing enrollment manager
- Determine what outside resources are required, if any, to ensure a quality program
- Identify speakers to present sessions at the conference which may or may not include task force members, keeping in mind the development of an exceptional attendee experience
- Work with other pathway chairs to remain within budget regarding speaker and travel expenses

Compliance Management Pathway

Chair and Task Force will:

- Develop program sessions that identify compliance management strategies, administrative capability, and tactical methodology and collaboration beyond the financial aid office to achieve campus-wide compliance with all aspects of Title IV administration.
- Curriculum will be geared to the practicing compliance officer or financial aid director.
- Determine what outside resources are required, if any, to ensure a quality program
- Identify speakers to present sessions at the conference which may or may not include task force members, keeping in mind the development of an exceptional attendee experience
- Work with other pathway chairs to remain within budget regarding speaker and travel expenses.

Financial Aid Management & Leadership Pathway (formerly Succession Planning)

Chair and Task Force will:

- Develop program sessions that identify key and evolving management and leadership topics, including staff development and evaluation, identifying and growing leadership/management potential, understanding and applying diversity/equity/inclusion principles, managing up, campus and media relations, and self-reflection and personal branding.
- Curriculum will be geared to practicing financial aid directors or other high-level managers in larger, more complex aid offices
- Determine what outside resources are required, if any, to ensure a quality program.
- Identify speakers to present sessions at the conference which may or may not include task force members, keeping in mind the development of an exceptional attendee experience.
- Work with other pathway chairs to remain within budget regarding speaker and travel expenses.

FAAC® Forum

Chair and Task Force will:

- Develop program sessions that promote strategic thought, build on competencies required in Title IV Administration and consider campus collaboration beyond the financial aid office to provide opportunity for professional growth.
- Curriculum will be geared to the practicing financial aid administrator at all levels who hold the FAAC designation.
- Determine what outside resources are required, if any, to ensure a quality program.
- Identify speakers to present sessions at the conference which may or may not include task force members, keeping in mind the development of an exceptional attendee experience.
- Work with other pathway chairs to remain within budget regarding speaker and travel expenses.

General Duties of Task Force Members

- Attend all task force meetings and conference calls and participate in the deliberations.
- Notify the task force chair and the staff liaison if circumstances prevent attendance at a particular meeting.

- Adhere to deadlines for submission of task force assignments.
- Review all agenda items and background documents prior to each task force meeting and come prepared for the discussions.
- Serve as recording secretary for a task force meeting if requested by the task force chair.

Budget

A draft budget will be shared with pathway chairs before they begin planning their sessions. In addition to working with their respective task forces, pathway chairs will meet periodically with NASFAA staff to ensure the best allocation of speaker resources and associated travel costs to remain within budget.