

2023 SWASFAA Management Institute

Creating the Financial Aid Office of the Future

April 3-4, 2023 – New Orleans, LA

AUDIENCE

The SWASFAA Management Institute is geared towards senior-level financial aid administrators, generally defined as someone at a director, associate director, coordinator, or other senior leadership level in the financial aid office. You do not have to be a [member](#) to register for this event.

FORMAT

This workshop is not your traditional “conference.” The days are designed to provide facilitated group work following each of the presentations. This is an opportunity for each attendee to work in a group, discuss the presented materials, and develop a list of takeaways and/or action items that can be used at your institution. In other words, the sessions are designed to be “hands on” and interactive. You will learn from your peers as well as the presenters, which makes this a wonderful opportunity to find out what works at other institutions and brainstorm new strategies. Due to this structure, we are limiting the event to 30 attendees (subject to change).

LOCATION: Lowe’s Hotel, New Orleans, Beaugard Room

REGISTRATION INFORMATION

The registration fee is \$225.00. The Registration Deadline is March 24, 2023.

EVENT INFORMATION

Agenda

April 3, 2023

7:45-8:15 Registration and Breakfast with the SWASFAA Board, LaFouche Room

8:15-8:30 Welcome and Introductions- Ben Montecillo, SWASFAA President

8:30-9:30 **Effectively Articulating What We Do and the Value of Financial Aid Staff on Campus**

This panel discussion will focus on the purpose of articulating the value of financial aid to other campus departments.

9:30-10:30 Group work and discussion

10:30-10:45 Break

10:45- 11:45 **Strategic Succession Planning**

The session will focus on the purpose of succession planning, challenges for succession planning, aligning succession with organizational priorities and setting succession planning objectives

Speaker: Amy Cable, Chief Student Affairs Officer
Louisiana Community Technical College System

11:45-12:45 Lunch with the SWASFAA Board, LaFouche Room

1:00-3:00 **Strategic Succession Planning Cont.**

This session will focus on four hands-on activities that will help attendees:

- Identify significant business challenges
- Identify critical positions
- Identify competencies, skills and institutional knowledge
- Identify a talent pipeline
- Create an action plan to prepare the successor(s)

Speaker: Amy Cable, Chief Student Affairs Officer
Louisiana Community Technical College System

3:15-3:30 Break

3:30-5:00 **Effectively Managing a Hybrid Work Staff**

Life changes in front of our eyes every day. What was once the norm isn't but what was once odd is now the norm. Join this interactive session to learn about hybrid work scenarios, discuss case studies, and role-play as we help you solve your newest dilemma.

Speaker: Brenda McCafferty, Outreach Director
ECMC

5:00 Bowling and Hors d'oeuvres at Fulton Alley

April 4, 2023

8:00-8:30 Breakfast with SWASFAA Board, LaFouche Room

8:30-10:00 **Professional Communication Styles and Maintaining Our Relationships**

In this session, attendees will take a test developed by Richard Stephenson based on four personality types and will focus on understanding your communication style, understanding other's communication styles and how communication styles relate

Speaker: D. Ingram, Associate Director, Office of Financial Aid
University of Texas Southwestern Medical Center

10:00-11:30 **Diversity, Equity, and Inclusion and Management**

This session will focus on the importance of creating an inclusive work environment, identify foundational DEI concepts and strategies, and how to build more authentic and empathic relationships with your staff.

Speaker: D. Ingram, Associate Director, Office of Financial Aid
University of Texas Southwestern Medical Center

11:30- 12:30 Lunch with the SWASFAA Board, LaFouche Room

12:30- 2:00 **Dream Sessions: Building the Financial Aid Office of the Future**

In this session your group will develop the Financial Aid Office of the future (your dream office). Dream big! Take notes and prepare a short presentation about your FA Office of the future-you may want to explain why each point is important for success.

Speakers: Amy Cable, Chief Student Affairs Officer
Louisiana Community Technical College System
Brad Meyers, Associate Director, Operations and Compliance
Southeastern Louisiana University

2:00 Break

2:15- 3:30 **Group Presentations: Your Dream Financial Aid Office**

3:30 Adjourn

FOR MORE INFORMATION

Contact a committee member if you have any questions:

- Amy Cable, LCTCS amycable@lctcs.edu
- Brad Meyers, Southeastern brad.meyers@selu.edu