



**FASFAA Executive Board Meeting
Embassy Suites – USF/Busch Gardens
Tampa, FL
March 23-24, 2017**

2016-2017 FASFAA Executive Board

| Elected Officers | |
|---|------------------------------------|
| President | Joan Bailey |
| President-Elect | Thomas Vo |
| Vice President | Kamia Mwango |
| Secretary | Tracy Wiles |
| Treasurer | Gail Rogers |
| Immediate Past President | Ryan McNamara |
| Elected Region Representatives | |
| Region I | Rachel Robinson |
| Region II | Shirley Eubanks |
| Region III | Denise Asselta |
| Region IV | Nadine Bailey |
| Region V | Cherly Philippeaux |
| Members At Large Appointments | |
| Fiscal Concerns | Ryan McNamara |
| Annual Conference Chair / Ambassador / Volunteer Services | Nathan Basford |
| Vocational-Technical / Clock Hour Chair | Christine Taylor |
| Graduate / Professional Chair | Brenda Brown |
| Global Issues | Jeff Daniels |
| Membership | Merrian King |
| Electronic Services Chair | Jeremiah McMahon |
| Social Media Chair | Jenny Cun |
| Committee Chair Appointments | |
| Business Partner Liaison | Jeff Daniels |
| Parliamentarian Chair | Ryan McNamara |
| Federal Legislative Relations Chair | Francisco Valines |
| OSFA Liaison & Newsletter Chair | Levis Hughes |
| Special Projects Committee / The Archive / Research Committee | Pedro Hernandez |
| Scholarship Committee Chair | Laura Dickerson |
| Site Selection / Event Coordinator | Tracy Misner |
| Outreach Coordinator/Debt Management/Financial Literacy | Dameion Lovett |
| Vendor / Sponsorship Coordinator | David Alexander |
| Nominations | Thomas Vo |
| FASFAA Support | |
| Bookkeeper | Gwyn Francis |

Joan Bailey – President

Executive Board Report

March 2017

Why am I here?

I am here because I want to serve and give back to my profession, I want to help others develop knowledge and skills that empower them to make better contributions to the students we serve. I believe that I can continue to bring a fresh perspective to the organization. So far I have enjoyed what I have done and enjoyed working with the members of the organization. It hasn't been without challenges but nothing is ever without challenges. Thanks for the support of those board members who have supported my efforts to serve in one way or another.

Goals

- Work closely with all broad members to carry out the activities of the association
- Represent FASFAA at activities and events as required as duties of the president
- Provide state representation at the regional level by serving on the SASFAA Board
- Continue to assist with training initiatives at the regional and state level
- Write Articles for fall/spring news letter
- Assist with the 50th anniversary conference plans
- Prepare and implement strategies to ensure compliance of the Executive Board in governance and finance of a 501 C non-for-profit organization
- Assign task and duties to work groups, board members and committee chairs to meet the overall goals of the organization
- To lead and serve with integrity and excellence
- To continue to support, training, advocacy and professional development of FASFAA's members

Accomplishments and Activities

- Appointed Representative to complete Region II term due to resignation of elected representative.
- Appoint Kim Phillips and John Snow as co-conference registration chairs to replace Brian Casey who step down from this position.
- Continue to work ad hoc committee to work on developing and publishing a conference planning manual to be ready by Spring Board Meeting – Members originally led by Kim Phillips are, Nathan Basford Jeff Daniels, Tracy Misner, and Lee Ann Wolfenden – Jeff is now leading the group.
- Wrote article for FASFAA Newsletter
- Attended SASFAA Conference in Biloxi Mississippi and participate in the following SASFAA focused activities:
 - SASFAA's board dinner – It was a pleasure to attend the SASFAA board dinner prior to the opening of the conference. This provided an opportunity to network with the SASFAA board / leadership and the conference committee
 - Solicited and got videos to be used at our annual conference
 - Network with potential vendor sponsors – provided David with contact information
 - Other spontaneous meetings were held throughout the conference which allowed for idea sharing and collaboration for the development and planning of 2016-2017.
 - Along with the other state presidents we spoke with the presidents elects sharing words of wisdom with them

- State presidents handbook was completed and presented to the board, was accepted and will be shared with incoming presidents
- State president exchange power point was also approved by SASFAA Board
- Will be attending SASFAA Hill visit with Francisco – working on having other appointments scheduled however already have meetings scheduled with house and senate education committees.
- Conference planning is well on its way, agenda has been finalized and speakers secured.

Book Reflections/ New Ideas/Suggestions/ Personal Thoughts and Recommendations:

I am thankful for the opportunity to serve and appreciate all the efforts and ideas that have generated for consideration during the 2016-2017 year. I look forward to the rest of an enjoyable year as we work together to serve the membership of FASFAA.

Thomas Vo – President-Elect/Nominations

Executive Board Report

March 2017

Why am I here?

- To engage with colleagues and friends professionally and exchange information to improve our industry and our association

Goals

- Learn from others, network, and obtain leadership skills for Presidency next year

Accomplishments

- Attended NASFAA Leadership and Legislative Conference
- Attended SASFAA President Elect workshop

Recent Activities

- Attended SASFAA Regional Conference and President Elect workshop 2/12-2/16 in Biloxi, Ms.
- Attended NASFAA Leadership and Legislative Conference 2/27-3/2 in Washington DC. Report given to membership as follows:

NASFAA Legislative and Leadership Conference

As President-Elect, I had the honor of representing FASFAA at the NASFAA Legislative and Leadership Conference February 27 through March 1st in Washington D.C. This conference was for Financial Aid Administrators and Association President Elects/Officers and provided valuable training and insight on Association Management. The highlight of the conference was scheduled visits to Capitol Hill to discuss/lobby for Federal Student aid regulations with various Senate offices.

Cherly Philippeaux (Region V Representative, attending on behalf of her institution) and I were able to meet with representatives from Senator Rubio's and Senator Richard Burr (NC) offices where we discussed the following:

- FAFSA Simplification
- Continued use of Prior-Prior Year FAFSA and the advantages it gives colleges and students by packaging and awarding aid earlier and giving our students the chance to make admission decisions earlier.
- Giving Institutions the right to limit student loan borrowing. Institutions are held responsible for their cohort default rate but the regulations do not allow us to restrict borrowing amounts.
- Bring back year round Pell Grant to incentivize students to complete earlier and supporting NASFAA stance with Senate Bill 3040 for Year Round Pell.

Senator Rubio's office were appreciative of the time spent and really were engaged. They expect Education topics to occur later this year and took our business cards as they would like to contact us for detailed conversation.

We also scheduled a meeting at U.S. Department of Education headquarters with Federal Student Aid officials along with representatives from SASFAA. I was able to meet with the following personnel:

Gail McLarnon-
Acting Deputy Assistant Secretary

Policy, Planning & Innovation

Office of Postsecondary Education

Department of Education

Carney McCullough

Senior Policy Analyst

Office of PostSecondary Education

Department of Education

AnnMarie Weisman

Management and Program Analyst

Office of PostSecondary Education

Department of Education

Topics of discussion included:

- Continued use of Prior-Prior year FAFSA. (It is currently an Executive order and needs to become Statute)
- Code 399- (Conflicting information on 16-17 & 17-18 FAFSA) Provided USDOE feedback on this new regulation and advised them of our current numbers
- Pushed for Schools ability to limit student loan borrowing. '
- Pushed for guidance on schools having professional judgment on dealing with situations where household income may have changed from 2015 tax year to 2016 (first time using prior prior year tax info on FAFSA).
- Pushed for USDOE to increase processing time and communications on status of schools Recertification or changes to ECAR. Currently if we submit changes in officials or even request a program for Title IV authorization, it could take more than a year for approval.

- Increased support and guidance as it pertains to schools submitting Gainful Employment reports.

Overall, this was the most productive visit as Department of Education were very gracious and appreciative of the visit and feedback. They recommended we meet on an annual basis.

Kamia Mwango – Vice President of Training

Executive Board Report

March 17, 2017

Why am I here?

The Vice President of Training is responsible for providing resources to and assisting with coordinating all training activities of the Association, including workshops, seminars and conferences, as well as overseeing the Regional Representatives' training activities.

Goals

- The goal of the year is to provide a consistent 50th Anniversary theme of financial literacy/ default prevention as well as diversity/ inclusion at FASFAA training events, and to continue to provide the training to the membership via Clock Hour Workshop, region workshops, and the conference program with sound fiscal management.

Accomplishments

- The Clock Hour Workshop was held on October 25th – 27th in Sarasota, FL with headliner David Bartnicki. Presentations from the workshop are available for download.
- Procedures and resources are available to the training committee members via previous committee members, the FASFAA Policies and Procedures document and via the updated shared [Google Drive](#). Resources include template documents such as agenda, evaluation, planning/checklist, sign-in sheet and announcement samples. These materials were made available through the efforts of past region reps and training committee members.

Recent Activities

- As Shirley Eubanks needed to resign from the Region II Representative position, the FASFAA Training Committee welcomed Nichole Crowley as Region II Representative by appointment on Wednesday, March 1, 2017.
- Spring region workshops are in various stages of planning.
- The *draft* annual conference agenda has been posted to the FASFAA website, and the final agenda with room assignments, session descriptions, and guest speaker bios is in the works.
- Personalized emails will be sent out encouraging attendance at the FASFAA conference.
- Conference presenters have received the presentation template and preliminary information. Presenters and moderators will receive follow-up information soon.
- Guest speaker bios and photos will be provided for the conference program shortly.
- Quotes for recording sessions and/or events will be provided to the board for consideration.
 - Sessions can be recorded for training purposes, and can be provided as a member benefit, behind a pay wall, as part of the conference package, or any combination of the above.
 - Special events for the 50th anniversary can also be recorded for posterity.
- Quotes for FASFAA wi-fi hotspots can be provided to the board for consideration.
 - A number of options exist for providing wi-fi during training events, including renting temporary wi-fi systems, and purchasing wi-fi hotspot equipment. Costs vary by type of solution and how the association would like to organize the wi-fi access.

- Renting wi-fi systems for each non-conference training event would likely cost more, but would provide greater access to attendees.
- Purchasing wi-fi hotspots would keep costs relatively low but would require keeping up with multiple devices in order to cover adequate attendees, especially when venues typically provide free wi-fi at non-conference events.
- One solution is to ensure that presentations are available for attendees to download prior to attending the events and training, reducing the need for wi-fi at the event(s).

Tracy Wiles – Secretary

Executive Board Report

March 2017

Why am I here?

- Get involved by meeting new friends and colleagues.
- Complete all secretarial responsibilities and assist in any other way that I am able.

Goals

- Help any board or FASFAA members with any given tasks.
- Ensure that all executive board members have the most up-to-date information.
- Send out compilation reports, meeting minutes and board meeting agendas.
- Work with President on any additional tasks that may need to be completed.
- Continue working on and updating the FASFAA Policy and Procedure Manual as needed.

Accomplishments

- Send out necessary documentation to board members for upcoming meeting.
- Complete meeting minutes for board approval.
- Updated our executive board contact list.

Recent Activities

- Put together compilation report from board members and send out meeting minutes.
- Continue researching more on Robert's Rule of Order to ensure that our meeting minutes are true to what we have written in our governing and policy documents.
- Updated our contact list to include the new Region II Representatives information.

Gail Rogers – Treasurer

Executive Board Report

March 2017

Report Pending

Ryan McNamara – Immediate Past President/Fiscal Concerns/Parliamentarian Chair

Executive Board Report

March 2017

Recent Activities

I contacted Steve with UBS to find out the income in the Bonnie Pirkle account for 2016 and then did the calculation based upon our P&P and calculated what we can award in Bonnie Pirkle awards.

“The entire income from the Bonnie Pirkle Scholarship Fund may be distributed annually. This amount must first be reduced by an amount equal to the annual inflation rate as determined by the Consumer Price Index or other appropriate index, times the total amount in this scholarship fund at the time the amount of the award is determined. Such amount shall be added to the principle sum of the endowment fund each year before the distribution of the income to the recipient.” – FASFAA Policy 7.3

Inflation rate currently is 1.3% at December 2016.

So I calculated the following...

$$(0.013 \times 299,051.64) - 15,200.98 = 11,313.31$$

| | 2016 12/31/2015 to 12/31/2016 |
|--------------------------|-------------------------------------|
| Opening value | 288,120.66 |
| Net deposits/withdrawals | -4,270.00 |
| Investment return | 15,200.98 |
| Closing value | 299,051.64 |
| Net Time-weighted ROR | 5.36 |

Motion: It is the Fiscal Concerns recommendation that FASFAA awards \$10,000 in Bonnie Pirkle Scholarships for the 2016-17 year.

Rachel Robinson – Region 1 Representative

Executive Board Report

March 2017

Why am I here?

- * To support the financial aid community in Region 1, by making continuing educational opportunities available via workshops that meet their needs.
- * To work with board members and others to accomplish these ideas.

Goals

- * Encourage financial aid managers to participate and allow their staff to participate in FASFAA Region 1 events.
- * Encourage staff to participate, volunteer and become a FASFAA member and actively seek approval from managers to become more involved in this ever changing and challenging environment.

Accomplishments

Region 1, Fall 2016 Workshop was held at Gulf Coast State College, Panama City, Florida, October 7, 2016. It was 18 people that attended.

Members participated in the 50/50 Raffle for the Bonnie L. Pirkle Memorial Scholarship and raised \$52.00. And Rebecca Ramsey won the scholarship and give it back to the scholarship.

Other topics: Safety in your workplace, State update verification overview, Default management and Financial Literacy, Diversity in workplace.

- * Held Region 1, Spring Workshop at FSU Panama City, Florida, and March 03, 2017. It was very successful with 22 members attending.
- * Members participated in the 50/50 Raffle for the Bonnie L. Pirkle Memorial Scholarship and raised \$52.00. The raffle was won by Ms. Collette Barnes from FSU she took \$20 and put \$6 back and Kris Hatcher put \$20 back in returned to the scholarship which brought the total back to \$52.00.
- * Had a discussion with members who had similar experience. This was an opportunity to compare different office procedures and develop working relationships across the region which ultimately helps with requesting assistance when members are acquainted with each other. We also did Ice breaker which that was a huge success.

* Other topics: SAP, Federal Updates, State up dates, Loan repayment, were received well by members.

Recent Activities

- * Region 1, Spring Workshop was held at FSU Panama City, Florida, on March 03, 2017

Nichole Crowley – Region II Representative

Executive Board Report

March 2017

Report Pending

Denise Asselta – Region III Representative

Executive Board Report

March 2017

Why am I here?

- To support and facilitate communication to Region III members through training experiences, ideas, and information.

Goals

- Provide a variety of training experiences to Region III members during workshop events.
- Promote communication throughout the Region III membership.
- Strive for members to pursue excellence to students when providing financial aid.

Accomplishments

- Region III Fall Workshop was Friday, October 14th at the Technical Education Center Osceola (TECO).
- 25 members attended the workshop, topics included safety in the office, dependent and independent status, CDR's, student loan debt good or bad, state update, verification, credit and clock hour round table discussion.
- \$53.00 were collected for the Bonnie Pirkle Scholarship 50/50 raffle. The lucky winner took home \$25.50.
- Region III also had a school supply collection for the Bridges of Light Foundation we collected two boxes of school supplies for the annual conference.
- At the region III workshop information was given to members about running for the Region III Representative position which is coming available this year.
- David Alexander and I attended the SASFAA Leadership Symposium on October 27-28, in Orlando, FL. There were approximately 50 folks who attended the symposium. The symposium delved into the book "The Five Dysfunctions of a Team." The five dysfunctions included absence of trust, fear of conflict, lack of commitment, avoidance of accountability, and lastly inattention to results. Each of the five dysfunctions build on one another which is represented in the form of triangle. This workshop provided great insight into how to develop a great team.

Recent Activities

- The Region III Spring Workshop is taking place on Friday, April 14th at the Orange Technical College Mid Florida Campus.
- Topics will include: Verification 2017-2018, State Update, Eating the Frog and Other Key Principles of Time Management, Error Code 399, Leadership, Financial Literacy, and Clock Hour Round Table Discussion
- We will also be serving lunch and a light breakfast which is courtesy of the Dunkin Donuts Winter Garden Store.
- During the workshop we will be having a 50/50 raffle for the Bonnie Pirkle Scholarship fund along with collecting donations for school supplies for the Bridges of Light charity.

Nadine Bailey – Region IV Representative

Executive Board Report

March 2017

Why am I here?

- As a board member to provide support and perform the duties as required of a region representative.
- To support the organization members, especially those in Region IV by providing opportunities for direct access to a FASFAA board member.
- To garner more interest and participation in the association.

Goals

- Increase members overall and garner more participation in regional and state-wide events.
- To identify and ensure the under-served sector (if applicable), has a conduit to the association.
- Help increase donations to the Bonnie Pirkle Scholarship fund.

Accomplishments

- Had a successful fall workshop – about 55 attendees
- At the fall workshop, did a 50-50 raffle for BPS collected \$341, winner donated \$50 of winnings, earned \$220.50 towards BPS.
- Collected school supplies for the Bridges of Light charity
- Created workshop certificates of attendance – was well received

Recent Activities

- Received a donation of \$250 from my school (UMA) for BOL, along with 6 backpacks
- Spring workshop scheduled for April 7th at UMA.
- Having a school supply at my two campuses for BOL
- Helping any way I can for a successful FASFAA Annual conference

Cherly Philippeaux – Region V Representative

Executive Board Report

March 17, 2017

Why am I here?

- My role as Region V representative is to tailor workshops that will benefit my region. I will ensure that my workshops underlined the President's theme and work collectively with board members for additional training for members.

Goals

- Provide workshops for the members that are unable to attend the national/regional conference and encourage round table discussion for the financial administrator.
- Increase professional and peer networking among the Financial Aid Professionals
- Encourage financial aid professionals to participate and volunteer in FASFAA conference.

Accomplishments

- Finalizing agenda items for upcoming Workshop on April 28 at Broward College Central Campus in Davie Road.
- Email will be sent to Region once the website is updated with the link for Registration
- Reaching out to presenters with variety of background to present in the upcoming workshop. Working collectively with Vice President of Training in identifying presenters.

Recent Activities

- Fall Workshop had about 23 attendees with attendees from across the region. We had great turnout
- Members participated in the 50/50 Raffle for the Bonnie L. Pirkle Memorial Scholarship and raised \$44.00. The winner returned the funds to the scholarship. Winner is from FAU

Nathan Basford/Conference Chair/Volunteer Chair

Executive Board Report

March 2017

Why am I here?

I am here to serve FASFAA this year as Conference chair. I am very excited to be given this opportunity to serve as conference chair for our 50th Anniversary. I look forward to working with each committee member and serving under President Bailey.

Goals:

- Present a conference budget to the executive board for approval.
- To work with each committee chair on the conference committee to ensure that we provide a conference program that will attract and encourage all in the financial aid community here in Florida to attend.
- To ensure that members of FASFAA who have completed the volunteer form are utilized throughout the year
- Address any issues or concerns from our membership that relate to the positions that I have the honor to serve on this year.

Accomplishments:

- A proposed conference budget was presented to the executive board at our first meeting.(Approved)
- I have been working with conference committee to ensure that we will provide a conference program that will attract and encourage all in the financial aid community here in Florida to attend. (Updated Agenda posted to the website 03/20/2017) All participating on the conference committee have been very busy to ensure that we have all vital information posted to the conference website!
- Registration open and folks registering. **Will provide numbers at board meeting for conference as well as pre-con workshops.**
- Thanks to Laura for taking the lead on getting volunteers to sign up this year. A list was sent to each conference committee member and hopefully each were able to have those volunteering serve on your committee.
- Thanks also to Merrian for working with the new members (Ambassadors) she is working to have items available to our first time attendees at our annual conference.

Recent Activities:

- Sent email to members reminding them to register for the conference and pre-con workshops.
- Have held two conference committee conference calls
- Members of committee continue to work to ensure all task assigned to them are in progress and will be completed by the **Opening session of our 50th celebration!**

Outstanding Task:

- Kim Phillips has been very busy working with hotel and other items for the up-coming conference that this task has been placed on the back burner at this time. We hope to address this and have completed by the transition meeting, **if not; will be a task that can be addressed in 2018.**

New Ideas/Suggestions/Personal thoughts & recommendations:

- As a board member; each of us needs to ensure that we know our responsibilities and be sure to communicate with any concerns or questions.
- As the conference date draws close, let's all continue to work to promote our 50th celebration!

Christine Taylor – Vocational-Technical/Clock Hour Chair

Executive Board Report

March 2017

Why am I here?

- To represent and serve the technical/clock hour schools and programs in the state of Florida.

Goals

- To assist the technical/clock hour schools and programs in the state of Florida by way of training opportunities and lending resources and/or tools. This will be done through organizing the upcoming 2016-2017 Clock Hour Workshop and solid representation of these schools and programs at the annual FASFAA conference
- Have technical/clock hour schools and programs more visible in FASFAA by making sure the needs of these schools and programs are being addressed through training, and to encourage active participation and more involvement in FAFSAA by way of volunteering

Accomplishments

- Had a successful 2016-2017 Clock Hour Workshop with approximately 100 attendees.
- Built relationships with the attendees of the workshop
- Open communication with FASFAA members to keep them informed and answering questions regarding the workshop pre and post workshop

Recent Activities

- Reach out for presenters and topics for Annual Conference

Brenda Brown – Graduate/Professional Chair

Executive Board Report

March 2017

Why am I here?

- To ensure that the graduate and professional FAA's who are members are receiving the training they need to best serve their students on their campuses.
- To mentor and encourage FAA's on our association to consider volunteer opportunities and future leadership roles in our association.
- To assist FASFAA Executive Board members understand the importance of ensuring that all members are receiving the same benefits for their membership.
- To mentor and encourage Executive Board "newbies" to understand that even though we are volunteers, we have responsibilities. Our responsibilities are to ourselves, our Executive Board, our association, our profession and our colleges/universities.

Goals

- Collaborate with the Outreach and Financial Literacy Chair to provide a training opportunity that best serves FASFAA members responsible for financial literacy, money/debt management and default prevention on their campuses.
- Provide network opportunities for FAA's who are responsible for money/debt management or financial literacy efforts on their campuses.

Accomplishments

- Collaborated with Financial Literacy and Outreach Chair to provide a Pre-Conference workshop with an agenda that best suits FAA's to assist students in the area of financial literacy, money/debt management while also assisting their campuses with retention and default prevention.
- Collaborated with Financial Literacy and Outreach Chair to provide sessions for the conference that best suits FAA's to assist students in the area of financial literacy, money/debt management while also assisting their campuses with retention and default prevention.

Recent Activities

- N/A

Jeff Daniels – Global Issues

Executive Board Report

March 2017

Why am I here?

- To serve FASFAA members in the best way possible and to make valuable connections with FASFAA Executive Board members, both old and new, and FASFAA members as a whole. I would also like to increase my knowledge of the Florida Association as ideas are shared throughout the year. In addition I want to increase the efforts of the Global Issues Committee.

Goals

- Provide a link to global issues or diversity-based events or news items on the FASFAA website.
- Each month, on the FASFAA website or through the FASFAA Listserv, make available an article focusing on global issues.
- Work with conference committee to incorporate interest sessions or a speaker at the 2017 FASFAA Conference that focuses on global issues.

Accomplishments

- No accomplishments as of yet.

Recent Activities

- I submitted multiple session proposals to be considered for the 2017 FASFAA Conference. One session titled “A Powerful Perspective on Stereotyping” was accepted. In this session, participants will be exposed to Adichie Chimamanda's "The Danger of a Single Story," a powerful and intriguing conceptualization of stereotypes.

Jeff Daniels – Business Partners Liaison

Executive Board Report

March 2017

Why am I here?

- To serve FASFAA members in the best way possible and to make valuable connections with FASFAA Executive Board members, both old and new, and FASFAA members as a whole. I would also like to increase my knowledge of the Florida Association as ideas are shared throughout the year.

Goals

- To continually reach out to Business Partners to solicit any ideas, suggestions, or concerns that may enrich their role as a member of FASFAA.

Accomplishments

- Sent email to business partners introducing myself as their voice on the Executive Board and soliciting ideas and/or suggestions they would like to be discussed this year.

Recent Activities

- No recent activities.

Merrian King – Membership Chair

Executive Board Report

March 2017

Report Pending

Jeremiah McMahon – Electronic Services Chair

Executive Board Report

March 2017

Why am I here?

- To support the Executive Board and Region Representatives in maintaining the organization's website

Goals

- Maintain up to date information regarding Fall/Spring Region Workshops and Annual Conference
- Ensure Registration is operational and functioning normally for each event
- Provide support to Executive Board / Conference Committee for any additional website updates/requests
- Membership support with regards to username/password issues, form assistance and general website inquiries

Accomplishments

- Annual Conference / Pre-Conference Registration is up and running
 - 121 registrants as of 3/20/17
 - Fin Lit Pre-Con – 9 / NASFAA Pre-Con - 8
- Overhaul of the Annual Conference page for the 50th Anniversary
- Added photos for Executive Board Members

Recent Activities

- Updated and went live with Region IV Spring 2017 Workshop Registration
- Updated new Region II representative on necessary e-lists, Executive Board and Region II page
- Updated Region V Spring Workshop, Registration link sent to Region Rep for testing

Francisco Valines – Federal Legislative Relations Chair

Executive Board Report

March 2017

Why am I here?

- To #resist and #persist and #coexist!

Goals

- Keep FASFAA up to date on happenings in DC
- Track Reauthorization progress
- Provide a monthly Florida Legislative update for the Membership and SASFAA
- Publish a “How to Track Legislation” primer for this next Florida Legislative session

Accomplishments

- Monthly legislative report to SASFAA and FASFAA membership
- Planning for SASFAA DC Legislative Advocacy trip
- Tracking HE legislation in the Florida Legislature and updated the membership

Recent Activities

- Monthly legislative reports to SASFAA FASFAA membership
- Consulted with Congresswoman Bonamici from Oregon’s staff and staff from The Education Trust on a proposed Federal Work Study bill

Levis Hughes – OSFA Liaison and Newsletter Chair

Executive Board Report

March 2017

Why am I here?

- To assist FASFAA in fulfilling its purpose
- To provide an update of state activities from the Office of Student Financial Assistance (OSFA)

Goals

- To coordinate state program needs of the Association and the Executive Board
- Produce and present the newsletter to the president
- Where applicable and allowed, solicit board members opinions and suggestions about potential state program changes

Recent Activities

- The **2017 Legislative Session** convened on March 7, 2017, and will conclude on May 5, 2017. Currently, there are several bills focused on OSFA-related topics such as: Bright Futures summer funding, student loan forgiveness, and scholarships.
- As in prior years, OSFA is tracking various bills and will be providing a **2017 Florida Legislative Mid-Session Update** on bills that may affect state scholarships and grants.
- For the 4th quarter of 2016, OSFA's Outreach Team conducted 954 workshops throughout the state of Florida, which represents a 9% increase from 2015. The majority of the workshops provided were identified as **Financial Aid Overviews** for the secondary school campuses. The workshops are aligned with **Florida Students Achieve**, a partnership between the Florida Department of Education and the Florida Education Foundation. The goal of **Florida Students Achieve** is to allow all students the opportunity to "emerge from public education as a young adult both with high aspirations and the full capability to pursue them." A key component for a young adult to effectively transition from secondary to postsecondary education is to provide information on how to apply and receive financial aid.
- The **FASFAA Winter Newsletter** was published in December with many articles about FASFAA members – accomplishments, accolades, and travels.
- The **FASFAA Spring Newsletter** is ready for articles to be submitted from membership about your institution's accomplishments, awards, changes, and updates.
- OSFA is working with schools to ensure timely reconciliation and the returns of refunds within the statutory deadline of 60 days from the last day of drop/add. Refunds are then reallocated to schools requiring additional funding to disburse to eligible students.

Pedro Hernandez – Special Projects Committee/The Archive/Research Committee

Executive Board Report

March 2017

Why am I here?

- To assist the FASFAA Executive Board with special projects, archives, or research as it pertains to the upcoming Annual Conference (FASFAA at 50) to be held at the Hyatt Regency Grand Cypress Resort in Orlando, Florida.

Goals

- Primary:
 - Research archives for information, documents or past conference memorabilia to assist the FASFAA Conference Committee in preparing for the upcoming Annual Conference (FASFAA at 50).
- Secondary:
 - Identify and document the FASFAA archives located at OSFA (Turlington Building - Tallahassee, FL)
 - Create an archive policy and procedure section to be incorporated into the FASFAA P&P
 - Collect the following documentation from the upcoming Annual Conference (FASFAA at 50) to add to the FASFAA archives:
 - Program (Both physical and electronic)
 - Centerpiece (Physical)
 - Pictures (Both physical and electronic)
 - Work with the FASFAA Executive Board to create documents of intent for special projects

Accomplishments

- Identified and consolidated items to display at the upcoming Annual Conference (FASFAA at 50).
 - Previous conference centerpieces, shirts, pictures and programs
 - Identified fun facts, trivia, and past logistics
 - Inventoried all 13 plastic Bins located at OSFA (Turlington Building - Tallahassee, FL)

Recent Activities

- See above.

Laura Dickerson – Scholarship Committee Chair

Executive Board Report

March 2017

Why am I here?

- Sorry unable to attend this EB. But here to assist in any way possible to garner the success of FASFAA and promote the organization.

Goals

- Learn and grow within FASFAA organization. Deepen my understanding and expand contacts and resources FASFAA has to share

Accomplishments

- To date: have created a process of acknowledging and follow up with volunteers to FASFAA

Recent Activities

- Scholarship:
 - working with region reps to help understand Scholarship promotion opportunities within their regions
 - Securing information for Scholarship details and promotion during FASFAA conference
 - Identified volunteers for Scholarship booth during conference
 - Working to gather items for Raffle basket for conference
 - Working with Cindy and others to gain more pictures and details about Bonnie Pirkle and scholarship to share during conference
 -
- FASFAA volunteer
 - Created process with Jerry on identifying and responding to potential volunteers
 - Created spreadsheet to disseminate volunteer contacts to group.

Tracy Misner – Site Selection/Event Coordinator

Executive Board Report

March 2017

Report Pending

Dameion Lovett – Outreach Coordinator/Debt Management/Financial Literacy

Executive Board Report

March 2017

Why am I here?

- To support the organization's members by providing quality outreach opportunities in the area of default management and financial literacy that meet the needs of the association
- To help facilitate association members to become more knowledgeable in understanding how debt management and financial literacy promotes student success
- To work with other members on the board in fulfilling the associations goals

Goals

- Assist region representatives with selecting financial literacy topics for presentation at the region workshops
- Provide timely information about various debt management and financial literacy topics to membership via email
- Work with Graduate/Professional Chair to provide quality debt management and financial literacy sessions at the annual conference

Accomplishments

- Completed pre-conference agenda, including topics and presenters for the annual conference. Topics:
 - Building a Financial Wellness Program
 - Providing Financial Literacy Services on Campus
 - Loan Repayment Strategies & PSLF
 - Financial Literacy Programs on Campus
- Completed a financial literacy track of sessions, including presenters for the annual conference. Topics:
 - Lowering Your CDR By Identifying At-Risk Students
 - Graduate and Professional Student Loan Debt
 - Maximizing Your Reach Through Collaboration
 - Erasing the Stigma of Seeking Financial Counseling
 - What Happens If I Can't Pay? Options For Financially Challenged Borrowers
 - Engaging Millennials with Money Matters

David Alexander – Vendor/ Sponsor Chair

Executive Board Report

March 2017

Why am I here?

- To do my part in making this a successful sponsorship year and helping the board members with their tasks.
- To gather as many sponsors that I can in order to exhibit at the conference.
- Be a resource to the vendors for questions, concerns, registrations, ideas, and more.

Goals

- Generate \$40,000 from vendors/sponsors
- To have one housing area that has a viewer friendly layout for the vendors/sponsors and participants to enjoy
- To ensure all of our vendors needs are met, throughout the year
- To create and facilitate a vendor/attendee game that will promote interaction and drive traffic to the vendor area

Accomplishments

- As of 3/14/2017, we have received \$40,100 worth of vendor/sponsor funding. We have hit our goal for the 2017 conference!
- We have gained 2 new first-time vendors(Goal Structured Solutions and Culearn with Thrivent)

Recent Activities

- Maintained great communication with our vendors
- Ordered the vendor gifts(Tumblers)
- Updated the site:
 - Ensured all vendors are reflective on the recognition portion of the sponsor page
 - Removed the early bird special information, as that promotion has expired

Gwyn Francis - Bookkeeper

Executive Board Report

March 2017

Report Pending