



**FASFAA Executive Board Meeting
Safety Harbor Resort and Spa
Safety Harbor, FL 34695
October 23-24, 2017**

2017-2018 FASFAA Executive Board

Elected Officers	
President	Thomas Vo
President-Elect & Nominations	David Alexander
Vice President	Kamia Mwango
Secretary	Denise Asselta
Treasurer	Gail Rogers
Immediate Past President & Fiscal Concerns	Joan Bailey
Elected Region Representatives	
Region I	Kris Hatcher
Region II	Nichole Crowley
Region III	Sedrick Brinson
Region IV	Nadine Bailey
Region V	Katie Conrad
Members At Large Appointments	
Annual Conference Co-Chairs	Maureen Anderson
	Virginia (Gina) Odoardi
Vocational-Technical / Clock Hour Chair	Christine Taylor
Graduate / Professional Chair	Rachel Robinson
Global Issues/Business Partner Liaison	Sean Johnson
Membership	Rabecca Hall
Electronic Services Chair	Christina Heritage
	Jeremiah McMahon
Special Projects/Communications	Haley Auxier
Committee Chair Appointments	
Federal Legislative Relations Chair	Cherly Phillippeaux
OSFA Liaison & Newsletter Chair	Levis Hughes
Scholarship Committee Chair	Tracy Wiles
Site Selection / Event Coordinator	Tracy Misner
Financial Literacy	Irma Molinares
Vendor / Sponsorship Coordinator	Jeff Daniels
FASFAA Support	
Bookkeeper	Gwyn Francis

Executive Board Report

October 2017

Why am I here?

- Provide leadership and guidance to association. Support our members and foster a supportive and respectful environment.

Goals

- TBD..... Among proposed goals are FASFAA Leadership, audit, increased outreach, and New Aid Officer Workshop

Accomplishments

- TBD

Recent Activities

- July 15- Membership renewal drive email sent
- July 15- Formed FASFAA Advocacy Committee. Sent email to Florida Legislature.
- Aug 11- Formed FASFAA Training Committee. Planning Clock Hour and New Aid Officer Workshop. (Weekly calls- 30 min)
- Sept 6- Membership Email. Pre-hurricane Irma
- Sept 11- Membership Email. Day After Post Hurricane Irma support
- Sept 21- Membership email- Registration Open for New Aid Officer Workshop and Clock Hour.
Dear Colleague GEN 17-08. Hurricane Irma Guidance
Promotion of SASFAA Enrollment Management Symposium
- Sept 26- Membership Email- Summary of Hurricane Irma Support activities, promotion of NAOW and Clock Hour Workshop Agendas, OSFA Form Your Future Launch, Reschedule of Fall Board Meeting. (See below)

Good Afternoon,

I am writing to provide all members with relevant news/updates. To be sensitive to your time, I will keep this email brief/outline form.

HURRICANE IRMA RELIEF/UPDATE

- I. On September 15, FASFAA Region 1 Representative Kris Hatcher and I represented FASFAA on a stakeholder call with Department of ED and Federal Student Aid personnel to discuss USDOE and FSA outreach and support during Hurricane Irma. Summary as follows:
 - A. Estimated 2 million students may have been affected by Hurricane Irma
 - B. FSA sent over 2,400 emails to institutions that may have been affected by Hurricane Irma.
 - 267 schools in Puerto Rico and US Virgin Islands
 - 850 schools in Florida

- 1,281 schools in Georgia, North Carolina and South Carolina
- C. Post Disaster email sent to all schools also which offered assistance and providing Dear Colleague GEN 17-08 with relevant guidelines.
- II. Department of Education have also sent letters to student loan borrowers offering flexibility in repayment of student loans in affected disaster areas
- III. Institutions needing assistance can contacted Department directly via email: IRMARELIEF@ED.GOV
- IV. Several institutions have contacted me and asked if there was any flexibility in FISAP and Gainful Employment submission deadline. I did ask this on the stakeholder call and was advised that if any affected schools need some flexibility in the deadline, they are to contact Atlanta Based School Participation team representative- 404-974-9303
- V. FASFAA Support- The following is summary of communications sent by FASFAA.
 - A. On September 7, I sent an email on behalf of FASFAA and the board offering the full support of FASFAA, NASFAA, and Department of Education.
 - B. On September 11, I sent an email (Post Hurricane Irma) on behalf of FASFAA offering continued support and providing names and contact of Region Reps
 - C. On September 15, I called institutions in the Florida Keys, Miami, Fort Lauderdale, Naples, and Jacksonville area to check on operational status and to offer support. Most institutions were closed still and I left voicemails.
 - D. I also posted messages on FASFAA HOME Facebook page for all members.

TRAINING OPPORTUNITIES

- I. Registration is now OPEN for **FASFAA New Aid Officer Training Workshop** incl. NASFAA Credentials held October 24-26th at the Safety Harbor Resort and Spa. Registration form is available [here](#) and resort reservation link is available [here](#)
 Under Special Codes enter **39G75S** for New Aid Workshop
- II. Registration is now OPEN for **FASFAA Clock Hour Training Workshop** with David Bartnicki. held October 25-27th at the Safety Harbor Resort and Spa. Registration form is available [here](#) and resort reservation link is available [here](#)
 Under Special Codes enter: **39G75W** for Clock Hour Workshop
- III. SASFAA is offering Enrollment Management Forum October 23-24 at the Embassy Suites, Lake Buena Vista Resort in Orlando, FL. Additional information and Registration link is available [here](#)

UPDATES/ANNOUNCEMENTS/MISC.

- I. The Office of Student Financial Assistance (OSFA) in partnership with the Florida Association of Student Financial Aid Administrators (FASFAA) is pleased to announce the launch of 2017 Form Your Future Florida campaign. This FAFSA completion initiative is sponsored by the National College Access Network (NCAN). Form Your Future Florida events will be held October 1 through November 30, 2017. Register as a host site by September 29 [HERE](#).
- II. FASFAA Fall Executive Board meeting has been postponed due to Hurricane Irma. The host location/annual conference site suffered some damage and was unable to accommodate our scheduled meeting date last week (September 20-22). Resort Renovations are underway and we are looking to reschedule for some time within next 1-2 months.

As always, the executive board and I serve as an honor and pleasure to our membership. If there is anything you require or any feedback you wish to provide, please do not hesitate to contact any of us.

Thanks for all your support!

- Oct. 2- Discussion with Justin Draeger and released membership email re: Statute changes for FSEOG AND FWS
- Oct 2- Membership email- SASFAA Enrollment Symposium
- October 4- Membership email NAOW and Clock Hour promotion
- October 9- Membership email- OSFA- FSAG Otherwise eligible award guidance
- October 10- Board email- Meeting with OSFA, soliciting discussion items

David Alexander - President-Elect/Nominations

Executive Board Report

October 2017

Why am I here?

- To do my part in making this a successful 2017-18 conference and nomination.
- Be a resource to the possible nominees and learn from the current and past presidents, in order to be successful in upcoming position.

Goals

- To ensure that we receive as many qualified nominees for the upcoming election
- Present a nomination list to the board for approval
- Successfully present a full slate

Accomplishments

- I've formed the conference co-chairs for 2018-19, which are Nathan Basford and Merrian King.

Recent Activities

- I've worked with Jeff Daniels, current Sponsorship chair, to ensure he has ample assistance and resources.

Kamia Mwango – Vice President of Training

Executive Board Report

October 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 training opportunities to new and seasoned financial aid professionals, and to continue to provide specialized training to the membership via Clock Hour Workshop, region workshops, and the conference program, all with sound fiscal management.

Accomplishments

- The NASFAA credentialing training package for associations has been purchased, and is now accessible for approved FASFAA training activities. Trainers and workshop planners can access the materials via this link to [Google Drive](#).
 - If copies are needed for an event, trainers may contact me to make arrangements, or can get reimbursed for their expense. Attendees of the New Aid Officer Workshop are to bring a laptop and a flash drive to access materials, etc.
 - FASFAA approved the \$1,600 purchase for 10 topics that offer certification to attendees (when offered by someone certified in that NASFAA topic).
 - Topics are Application Process, Direct Loan Program, Need Analysis, Federal Pell Grant and Iraq and Afghanistan Service Grants, Professional Judgment, Return of Title IV, Satisfactory Academic Progress, Student Eligibility, Verification, Cash Management
 - After a bit of confusion regarding format, CEU certifications and certificates have been sent to those requesting them from the Annual Conference.

Recent Activities

- Fall workshop planning is underway.
 - Some Region Reps mentioned providing NASFAA training at the region workshops. Whether the workshop offer credentialing or a more traditional region workshop agenda will be up to the representatives, based on feedback from the members in their areas.
 - Planning for some workshops has been affected by the hurricanes.
- Planning will soon begin for the 2018 Annual Conference.
 - Financial Literacy, Default Prevention, Grad/Professional, and Diversity were themes to be included throughout the conference last year. Looking forward to discussing highlighted topics for the 2018 conference.
 - Many of the presenters from the 2017 conference confirmed that they would be willing to return, as these presenters and/or their topics provided conference content that was varied enough for the many types of FASFAA members. The 2017 50th Anniversary Conference had 46 sessions, and survey

- feedback rated the training as 4.5 stars. Most everyone received training pertinent to their job. The goal is to provide another well-received series of sessions.
- Clickers will not be distributed to Region Reps or other training positions during the year to be brought to the conference for use.
 - The clickers will remain a part of general conference inventory/equipment for events like the Clock Hour Workshop or Annual Conference.
 - If clickers are needed, we can purchase a couple to be issued/checked out to those who need it separately. Often, clickers are already provided at the workshop venues.

Denise Asselta - Secretary

Executive Board Report

October 2017

Why am I here?

- Assist the executive board with communications and reporting responsibilities.

Goals

- Assist all FASFAA members with any given tasks.
- Keep all executive board members with up-to-date information on board communication.
- Send out compilation reports, meeting minutes and board meeting agendas prior to each board meeting.
- Work with President on any additional tasks that may need to be completed.

Accomplishments

- Send out necessary documentation to board members for upcoming meeting.
- Update P&P as requested.
- 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.
- Complete meeting minutes from previous meetings.
- Keep executive board in the know of deadlines for expected documents that need to be submitted.

Gail Rogers – Treasurer
Executive Board Report
October 2017

Pending report

Joan Bailey – Immediate Past President & Fiscal Concerns

Executive Board Report

October 2017

Pending report

Kris Hatcher - Region I Representative

Executive Board Report

October 2017

Why am I here?

- Serve the financial aid administrators of Region I

Goals

- Increase regional membership
- Explore the possibility of conducting virtual workshops
- Introduce information technology training sessions into workshop agenda
- Achieve fundraising & charity donation goals, as set forth by FASFAA's Executive Board
- Lobby for the expansion of need-based aid from the Florida Department of Education

Accomplishments

- Nominated to Advocacy, Training, and Auditing Subcommittees

Recent Activities

- Fall workshop
 - Scheduled for October 13th
 - Emailed save-the-date
 - Opened online registration
- Advocacy Subcommittee
 - Suggested letter to Governor Rick Scott, et al
 - Contacted Florida Representative Jay Trumbull to schedule face-to-face meeting for some time in October
- Training Subcommittee
 - Motioned the Mentorship/Leadership proposal that was approved during 8/4/17 conference call / quorum
- Auditing Subcommittee
 - Contacted two audit firms to begin bidding process

Nichole Crowley – Region II Representative

Executive Board Report

October 2017

Pending report

Sedrick Brinson - Region III Representative

Executive Board Report

September 2017

Why am I here?

- I am here to support, communicate and be the voice for Region III members. I am also here to facilitate training experiences, share ideas and information that will help advance individuals personally and professionally.

Goals

- To create a caring, inclusive and safe environment that inspires my colleagues to achieve their goals, share their success and encourage others.
- To learn by committing to core competencies – Think, Value, Communicate, and Act – and the potential of each person to learn at the highest levels of achievement for personal and professional success.
- To strengthen our collaboration between institutions in Region III and to foster deep stewardship of our work. Region III will also support the professional development, career growth and healthy lives

Accomplishments

- An email was sent on Tuesday, August 8, 2017 to Region III members to introduce myself as the new Region III Representative. In the email, they were notified of the date, time and place of the Fall 2017 Workshop.

Recent Activities

- My first Region III Workshop will be on Friday, October 20, 2017 and will be coordinated in a structured and well-organized manner. This workshop will provide Region III members with the necessary tools & training they need to fulfill their financial aid duties and responsibilities. This will also provide a time for our members to come together and discuss their experiences, financial aid issues, and new regulations for the upcoming year for financial aid professionals.
- The Region III Fall Workshop will be held at Valencia College, West Campus, Special Events Center on Friday, October 20, 2017 from 9:00 a.m. – 4:30 p.m.
- Presentations will include:
 - Who are our Students
 - Year-Round Pell
 - FASFAA Updates/Course Compliance
 - FAFSA Completion Rate
 - Mitigating Fraud Risks in the Title IV Programs
- Members will also be strongly encouraged to participate in the Bonnie Pirkle Scholarship raffle, which will take place during the workshop.

Nadine Bailey – Region IV Representative

Executive Board Report

September 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.
- Helping any way I can for a successful FASFAA Annual conference

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

- Updated Region IV page for 17-18 year.

Recent Activities

- Acquiring a site and date for the Region IV Fall Workshop.

Katie Conrad – Region V Representative

Executive Board Report

October 2017

Pending report

Maureen Anderson – Annual Conference Co-Chair

Executive Board Report

October 2017

Pending report

Gina Odoardi – Annual Conference Co-Chair

Executive Board Report

October 2017

Why am I here?

- I have attended two FAFSAA Conferences in the past. I gained lots of knowledge and have met some extraordinary people. At this year's conference I am serving as co-chair and I am extremely excited to be an integral part of this wonderful organization. I look forward to working hard and contributing in every way possible to making this year's FAFSAA Conference great!

Goals

- My goals are to promote and plan a successful and memorable conference.

Accomplishments

- TBD

Recent Activities

- Emailing back and forth with Maureen Anderson (the other co-chair)
- Taking notes from Thomas Vo (President)
- Working on a DJ for the conference
- Working on a logo for our conference theme

Christine Taylor – Vocational-Technical Clock Hour

Executive Board Report

October 2017

Pending report

Rachel Robinson – Graduate/Professional Chair

Executive Board Report

October 2017

Pending report

Sean Johnson - Global Issues

Executive Board Report

October 2017

Why am I here?

- I am here to seek and develop ways to enhance the experiences of everyone that is associated with FASFAA as well as represent the interests and concerns of its ethnic minority members.

Goals

- Promote understanding of the roles of culture and ethnicity within the financial aid community
- Foster the development of culturally sensitive announcements and materials
- Foster cultural diversity for all FASFAA trainings and activities
- Promote the development of more educational and training opportunities for ethnic minorities
- Advocate the perspectives and values of ethnic minorities
- Maintain mutually supportive and beneficial relationships with all ethnic minority groups within the financial aid community
- Promote inclusivity of our members and better understanding of the communities we serve

Accomplishments

- None at this time

Recent Activities

- Part of SASFAA Global Issues Committee
- Selected to write an Article that will represent FASFAA as well as promote diversity

Rabecca Hall - Membership Chair

Executive Board Report

October 2017

Why am I here?

- To learn, conduct, and suggest improvements to the duties of the membership chair.

Goals

- To provide excellent customer service to all members of FAFSAA whenever they have questions and/or requests relating to membership.
- To familiarize myself with Memberclicks
- Represent FAFSAA in a professional and positive manner

Accomplishments

- Learning the ins-and-outs of membership renewal and providing assistance to members

Recent Activities

- Updated Membership Certificate for 2017-2018
- Provided answers to membership inquiries by email
- Assisted with the activation of the accounts deactivated due to the expiration date

Sent electronic and paper copies of membership certificates upon request

Christina Heritage – Co-Electronic Services Chair

Executive Board Report

October 2017

Pending report

Jerry McMahon - Electronic Services Chair

Executive Board Report

September 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
- Evaluate "Event Management" functionality of Memberclicks
- Review "Wild Apricot" to determine if we need to change platforms
- Update site with current board member pics/bios
- Create Website Committee to review functionality and usefulness

Accomplishments

- Registration for NAOW
 - 15 Current Registrants
- Registration for Clock Hour
 - 51 Current Registrants
- Registration and site updates for Region I Fall Workshop
 - 14 Current Registrants
- Registration and site updates for Region III Fall Workshop
 - 22 Current Registrants
- Managing "expired" accounts for membership renewals

Recent Activities

- Updated site for NOAW and Clock Hour workshops with Agenda/Registration
- Membership support for registration and user/pw questions

Haley Auxier - Special Projects /Communications

Executive Board Report

September 2017

Why am I here?

- Manage the social media activity
- Monitor communication with the members

Goals

- Increase overall activity via social media sites
- Increase the number of

Accomplishments

- Introduced board to new social medial sites (Instagram & Snapchat)

Recent Activities

- Participated in weekly training calls
- Advertising upcoming events on all social media sites

Cherly Phillippeaux – Federal Legislative Relations Chair

Executive Board Report

October 2017

Why am I here?

- To assist the FASFAA Executive Board in upholding the mission of the association and inform/educate the memberships of legislative matters that will impact our offices policy and/or procedure.

Goals

- Primary:
 - Organize an Advocacy visit during legislative session where members can meet with staffers of the House and/or Senate and discuss Higher Ed related matters
- Secondary:
 - Keeping the Membership abreast of recent regulations change from the Feds and State

Accomplishments

- Currently organizing the advocacy visit with Jan Smith and Bill Spiers which will take place in late January or early February. Waiting on more information from Jan (OFSA) to confirm the dates.
- Reviewed SAFSAA Legislative Guide and will have an upcoming meeting to discuss changes.

Recent Activities

- Attended SAFSAA first conference call to discuss the year
- Upcoming- Hopefully assist Region V Representative with upcoming Fall Workshop in November 3rd.

Levis Hughes - Office of Student Financial Assistance Liaison and Newsletter Chair

Executive Board Report

October 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

- Support Board efforts for training for FASFAA members as directed by the Board.
- Coordinate state program needs of the Association and the Executive Board.
- Prepare Fall FASFAA newsletter, please submit articles.

Accomplishments

- 2017-18 General Appropriations Act has provided an additional \$320 million to fund state scholarships and grant programs.
- OSFA reorganized the outreach program to provide services from a centralized location. Pedro Hernandez and Jan Smith are the central contacts for our Outreach Services.

Recent Activities

- Ongoing outreach presentations for financial aid administrators.
- Monthly publications to assist postsecondary staff and students.
 - *News to Know* PSI and high school counselors
 - *NYFFE-News for Students* for PSI and high school
- Provided guidance to postsecondary institutions through a memo and question and answer document on funding of the Florida Academic Scholars award. The award will cover 100% of tuition and fees, plus an additional \$300 for textbooks and college-related expenses (fall and spring). OSFA also identified the specific fees which will be covered under the award.
- Provided guidance to postsecondary institutions on Senate Bill 396, Student Loan Debt through memos and frequently asked question and answer documents.
- Updated the OSFA website to provide up-to-date information to students and institutions, postsecondary and high school.

Tracy Wiles – Scholarship Committee Chair

Executive Board Report

October 2017

Why am I here?

- Get involved by meeting new friends and colleagues.
- Increase exposure and participation for the Bonnie Pirkle Scholarship Fund at workshops and the upcoming conference.

Goals

- Increase members' participation in contributing to the Bonnie Pirkle Scholarship Fund.
- Write up an article in the FAFSAA Newsletter explaining what Bonnie Pirkle is and who the past scholarship recipients were.
- Find committee volunteers that will support the organization's goals at all workshops and the annual conference.
- Work with the training committee to ensure that Bonnie Pirkle has a presence at all upcoming fall and spring training workshops.

Accomplishments

- I have worked with the previous Scholarship Committee Chair to see all of the progress she had made and see the direction to improve Bonnie Pirkle Scholarship Fund awareness.
- Ensured that we have raffle tickets for Bonnie Pirkle raffles.

Recent Activities

- Participated in training calls.
- Worked with region reps to ensure there is a Bonnie Pirkle presence at all fall workshops.
 - Kris Hatcher (Region I Representative) helped us raise \$55 for Bonnie Pirkle in the fall.
- Region I raised \$55.00 for the Bonnie Pirkle scholarship fund.

Tracy Misner – Site Selection/Event Coordinator

Executive Board Report

October 2017

Pending report

Irma Molinares – Financial Literacy

Executive Board Report

October 2017

Pending report

Jeff Daniels - Vendor/Sponsorship Coordinator

Executive Board Report

October 2017

Why am I here?

- To make valuable connections with FASFAA Executive Board members and FASFAA members as a whole as well as deepen my knowledge of FASFAA as ideas are shared. In addition I want to serve as a voice for FASFAA Business Partners with the goal of communicating any issues or concerns raised by them and to continue to solicit their support.

Goals

- To solicit vendor support at levels that will assist FASFAA in continuing to provide training opportunities for its members.
- To encourage new vendors to exhibit at the 2018 FASFAA Conference
- To continually reach out to Business Partners to solicit any suggestions, issues, or concerns that can be taken back to the Executive Board with the goal of enhancing the business partner's roles as FASFAA members.

Accomplishments

- By the time the board meeting takes place I will have reached out to a list of vendors to announce opportunities to support FASFAA

Recent Activities

- No activities to report at this time

Gwyn Francis – Bookkeeper

Executive Board Report

October 2017

Pending report