



**FASFAA Executive Board Meeting**  
Valencia College District Office  
Orlando, FL  
February 24-25, 2020

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## 2019-2020 FASFAA Executive Board

<b>Elected Officers</b>	
President	Daniel Barkowitz
President-Elect & Nominations	Dameion Lovett
Immediate Past President & Fiscal Concerns	David Alexander
Vice President of Training	Nadine Bailey
Secretary	Jenny Cun
Treasurer	Katie Conrad
Treasurer-Elect	Eileen Brzozowski
<b>Elected Region Representatives</b>	
Region I	Shana Gore
Region II	Nichole Crowley
Region III	Abigail Troche
Region IV	Kylie Gross
Region V	Jessica Ly
<b>Members At Large Appointments</b>	
Annual Conference Chair	Karemah Mansalle
Federal and State Legislative Chair	Kimberly Lent
Global Issues Chair	Trey Harrison
Vendor/Sponsorship Coordinator	Laura Dickerson
Site Selection/Event Coordinator	Jeff Daniels
<b>Committee Chair Appointments</b>	
OSFA Liaison	Louanne Standley
Volunteer Coordinator	Kamia Mwangi
Electronic Services Chair	Jeremiah McMahan
Communication / Outreach/ Special Initiatives	Vanesa Alfaro
Financial Literacy / Early Awareness	Ilia Cordero
Newsletter	Chansone Durden
Membership Chair (Local Arrangements)	Suzanne Evans
Scholarship /Charity Chair	Merrian King
25+ Year Member Liaison / Leadership Development	Donna Kolb
Webinars	Wayne Kruger
Private College (For Profit / Not-for-Profit) Liaison	Kevin McCrary
Graduate/Professional	Sandy Shimp
Vocational-Technical/Clock Hour	Teriann Wright
<b>FASFAA Support</b>	
Bookkeeper	Gwyn Francis

## Daniel Barkowitz – President

Executive Board Report  
Spring 2020

### **Why am I here?**

- My mission statement is to help facilitate the growth and sustainment of FASFAA through Opening the Door for our members. As my guiding principle for this year, I have chosen to focus on the following quote from Association Forum:
  - “When an association values differences and creates a welcoming environment – one that is comfortable, inclusive, and empowering – it **opens the door** for innovation, increased participation and an elevated sense of community and belonging for all.”  
-- from <https://www.associationforum.org/browse/welcomingenvironment>

### **Goals**

In 2019-20, we will Help Open the Door to FASFAA to:

- Our Members
  - By ensuring that every committee in our association’s governance includes multiple volunteers from the association (unless prevented by policy or procedure)
  - By providing training opportunities throughout the year that are local, free, and available (including regional workshop and webinars)
  - By providing professional development opportunities for all of our members regardless of their experience (New Aid Officer, Leadership Development, etc)
  - By delivering an exceptional annual conference with learning opportunities for members of many different experience levels
  - By informing our members through newsletters, emails, legislative advocacy outreach, and other ways of information pertinent to their jobs in a timely manner
- Our Students and Parents
  - By establishing a relationship with OSFA and our local area high schools to support FAFSA awareness and completion events
  - By working with FCAN and the LCANs in partnership to encourage financial aid awareness for our families
  - By providing scholarships through the Bonnie Pirkle program to deserving students and sharing the recipients stories at our annual conference.
- Our Colleagues in Other Departments
  - By offering sessions at our regional workshops and annual conference which provide opportunities for shared learning

- By considering the development of a high school counselor educational curriculum with “Beyond the FAFSA” content
- Our Sponsors / Vendors (also members) who support our work
  - By ensuring that the concerns of our partners are considered in the planning of our annual conference
  - By providing opportunities and rewarding meaningful conversation with the exhibitors at the conference
  - By working to ensure that the decision-makers are in the room at the FAFSA conference.
  - By working to prevent overlap with GASFAA for future years (2021 and after) by either coordinating our schedules or looking to move our conference to the Fall.
- Our Colleagues who are Not Yet Members
  - By reaching out to schools who are not yet members to invite them to be a part of FASFAA
  - By working on outreach communication from both FASFAA leadership and from higher education leadership in Florida
  - By examining our membership model (individual vs. institutional)

### ***Accomplishments***

- In partnership with each of you, I have worked to advance the goals above. Particular accomplishments include:
  - FASFAA’s Clock Hour Workshop which was held from October 28-30, 2019 in Altamonte Springs, FL) had a record setting 153 attendees. Of these attendees, 53 were from out of state. This total attendee count was the highest on record. The attendees were thrilled with the material presented and the quality of the workshop.
  - FASFAA held our New and Intermediate Aid Officer Workshop on January 22-24, 2020 in Boca Raton, FL. There were 46 attendees, which was a record high for recent years. 26 of our attendees registered for the New Aid Officer section of the workshop, while 20 registered for the Intermediate Aid Officer portion. Some sessions were held together as a group, while others were in breakout groups. We held a “graduation” at the end of the event, and celebrated those who attended.
  - FASFAA will hold a statewide Directors of Financial Aid meeting at Valencia College on February 25, 2020 and we currently have more than 77 attendees registered. This historic event will bring together Directors (and/or their designee) from public, private not-for-profit and proprietary institutions for a historic convening. We have partnered with ICUF (Independent Colleges and Universities in Florida), the SUS (State University System) Directors of Financial Aid, and COFAD (Council of Financial Aid Directors) from the State Colleges who all hold gatherings of Directors from their sectors; they will hold their Spring meetings in conjunction with the state gathering so many Directors who have not attended FAFSAA events will be there. In addition, we have decided not to charge attendees anything other than membership so we have gained new members as

a result. Finally, we are offering our top tier sponsors / partners the opportunity to hold a table at the event.

- FASFAA held our 2<sup>nd</sup> and 3<sup>rd</sup> Webinars for the 2019-20 session which were focused on the topics of Legislative Affairs and Advocacy Opportunities (38 attendees, November 7) and a Clock Hour 101 (53 attendees, October 10). Our next webinar will be held on February 19 and is focused on How to Determine Academic Calendars with the Changes in the Federal Definition of a Standard Term (at present there are 51 attendees registered).
- We currently have 853 paid members for 2019-20, which puts us far ahead of membership recruitment at this point in the year. Our conference (which is held in late May) registration is not yet open and requires current membership, so we do have a large membership growth at the end of the year.
- We completed our Memberclicks database upgrade in late January and while we are still working through some troubleshooting, we are already seeing a number of enhancements and benefits from the new version.
- Our Fall Regional Workshops were very successful with between 16 and 84 attendees.
- We continue to work with our Partner Advisory Council to understand and respond to partner needs. Because of industry changes, we have a new chair (Bill Ayers from College Ave Student Loans) who held our 2<sup>nd</sup> partner call on February 14.
- Our annual sponsorship is already in very good shape. We have 6 confirmed Platinum Sponsors (\$4000), 1 confirmed Gold Sponsor (\$3000) and 14 confirmed Silver Sponsors (\$2000). As an additional incentive for early commitment, we offered a discount for payment prior to December 31 which led to a number of early commitments. While we have not yet hit our total budget for sponsorship, we are close and the conference is still not until the end of May. Adding the benefit of participation as a sponsor at the Director's Workshop meant that several partners chose a higher level of sponsorship this year.
- Represent FASFAA to our regional and national associations and other professional associations and groups
  - Serve on SASFAA Board.
  - Led a SASFAA pre-conference session and two conference sessions.
  - Continued my tenure as Inaugural Chair for NASFAA's CFAA Commission.
  - Worked with FCAN and FPN to support college access and outreach
  - Will present at Alabama's AASFAA Conference in March.
  - Will present at EmpowerED conference in March.

***Recent Activities***

- See above

## Dameion Lovett – President-Elect

Executive Board Report  
Spring 2020

### ***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.
- Oversee elections committee to provide viable candidates for office next year.

### ***Accomplishments***

- Received candidates to run for office for next year's elections.

### ***Recent Activities***

- Nominations committee will have a slate to present to the board at the in person meeting.
- Putting together an investigative committee to explore the possibility of providing more financial aid training to high school guidance/career/college counselors. It has been expressed that more training is needed specifically for students who are homeless, from foster care and those who apply for dependency overrides. FASFAA, Florida College Access Network and the School District of Hillsborough County will be represented on the initial conference call.

## David Alexander – Immediate Past-President/Fiscal Concerns- Chair/Parliamentarian

Executive Board Report  
Spring 2020

### **Why am I here?**

*Support the President, Executive Board, and our Membership from the role of the Immediate Past-President. I shall also oversee the Fiscal Concerns Committee, as we strive to ensure the association remains in the best fiscal health. Next, to serve as parliamentarian for 2019-20. Lastly, to reform the Past President's Council, under the leadership of President Barkowitz. Overall, I am here to ensure FASFAA has a successful 2019-20 and apply my abilities to any area that utilize my assistance.*

### **Goals**

- Monitoring of Fiscal Concerns
- Review the budget/actual figures monthly and ensure we are within pace of remaining within the budget and alerting the President and Executive Board of any concerns.
- Provide a pie chart of the budget/actual figures as needed (Board meetings, etc.)
- Form the Past-President's Council for 2019-20
- Participate as a mentor in the LEAP

### **Accomplishments**

- The Past-President's Council has been formed and tasked with:
  - Creation of the 5 Year Strategic Plan, in comparison to the traditional 5 Year Fiscal plan.
  - Feedback and suggestions based on the current state of the industry and association.

### **Recent Activities**

- Strategic Plan proposal: (Please see attachment/handout)
- 2/14/2020 was my final day as Director of FA at the Universal Technical Institute. I wish the board a successful 19-20 and 20-21year. I look forward to continuing to support, as needed.

## Nadine Bailey – Vice President of Training

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To ensure that FASFAA members have access to training resources.
- To provide support to the Region Representatives in their trainings and workshops.
- To support the Clock Hour and New Aid Officer Chair for any trainings they may provide during the year and at the annual conference.
- To support the Grad/Professional Chair for any trainings they may provide during the year and at the annual conference.
- Assist with the trainings and sessions provided at the annual conference that addresses all areas for the FASFAA members and attendees.

### ***Goals***

- To provide an agenda for the annual conference that will attract attendees of all areas of financial aid, based on the tracks we discussed at the conference committee in the fall.
- Continue to provide support of the various delivery methods of training modules to increase outreach to members.
- Provide support to FASFAA Training Committee and the Conference Committee. Act as a liaison between both.

### ***Accomplishments***

- 

### ***Recent Activities***

- Regularly hold conference calls with the Training Committee and have brought in the Conference Chair to the meetings as well.
- Finalizing the agenda for the annual conference.

## Jenny Cun – Secretary

Executive Board Report  
Spring 2020

### ***Why am I here?***

- Assist the executive board with communications and reporting responsibilities
- Record minutes for each meeting and distribute to executive board members

### ***Goals***

- 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

### ***Accomplishments***

- Send out necessary documentation to board members for upcoming meeting
- Complete all meeting minutes for board approval

### ***Recent Activities***

- Created mailchimp email communication for grad/prof webinar

## Katie Conrad – FASFAA Treasurer

Executive Board Report  
Spring 2020

### ***Why am I here?***

- The Treasurer is responsible for managing the Association's financial matters. This includes working with the Bookkeeper, Treasurer-Elect, President, and Fiscal Concerns Committee to ensure the soundness of the Association's financial position.

### ***Goals***

- Develop the roles of Treasurer and Treasurer-Elect to divide duties previously held primarily by the Bookkeeper
- Update FASFAA P&P to include the division of duties referenced above

### ***Accomplishments***

- Monthly reconciliations of Checking, PayPal, and investment accounts
- Producing financial statements prior to each Board Meeting to provide the Board the most up-to-date information regarding our financial position

### ***Recent Activities***

- Monthly reconciliations of Checking and PayPal accounts
- Provided the Profit & Loss statement, Balance Sheet, and Budget vs. Actual statement for Board Meetings and monthly for the Fiscal Concerns Committee
- Collected payments and presented at the Intermediate Aid Officers Workshop (Packaging and Award Notification – NASFAA Credential, Building your Policies and Procedures, and Leadership panel)
- Filed the Bookkeeper's 2019 Form 1099 with the IRS
- Implemented new PayScape system to accept credit card payments online
- Assisted with testing the MemberClicks upgrade, updated website for new payment method.
- Developed proposal for Fiscal Concerns Committee and Internal Financial Review to be discussed at the February meeting.

## Eileen Brzozowski – Treasurer-Elect

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To serve FAFSFAA.

### ***Goals***

- Define the role of Treasurer-Elect.
- Further develop documentation and procedures for the Treasurer and Treasurer-Elect.

### ***Accomplishments***

- Completed bank reconciliations.

### ***Recent Activities***

- Met with Treasurer to draft master calendar and refine procedures.

## Shana Gore – Region I Representative

Executive Board Report  
Spring 2020

### ***Why am I here?***

- As the Director at a regional FL SUS, my institutions opportunities for training within our region and relationships developed throughout our region have been essential to professional development and training for our team. As Region I rep, I now have the opportunity to serve my region and be more engaged with my region. This position also gives me the opportunity to educate my region on the work and mission of FASFAA.

### ***Goals***

- Provide informative and engaging regional workshop
- Recruit additional volunteers to FASFAA
- Increase FASFAA membership from Region I
- Provide at least one NASFAA credentials training

### ***Accomplishments***

- Held successful fall Region I Workshop in Fort Walton Beach, FL
- Used a different format for Bonnie Pirkle Scholarship and raised \$150
- Delivered NASFAA credential training at Fall Region I Workshop (Needs Analysis)

### ***Recent Activities***

- Planning for spring Region I Workshop which will be held on March 24 on the campus of FL Gulf Coast State College in Panama City.

## Nichole Crowley – Region II Representative

Executive Board Report  
Spring 2020

### ***Why am I here?***

As Financial Aid professionals we are innovative, responsive, self-motivated, and constantly strive to reach our potential by seeking new challenges and opportunities for professional growth. Even as most of us feel confident that our education, abilities, and job-related experiences have prepared us all to be exceptional employees, we can take it to its next level.

I am here to challenge myself, and my FASFAA teammates to share information, develop burgeoning Financial Aid talent, implement best practices and further create that positive, enduring impact in the lives of our students and their families.

- Establish Region membership number benchmark and define measurable objectives for growth
  - 2019-20 = 131
- Increase number of NASFAA-credentialed Region members
  - Minimum – 1 new person in Region per Workshop (or mini-session)
- Facilitate Spring 2020 Region Workshop
  - Identify Workshop Committee (Workshop Champions) – host site
  - Solicit credentialed FASFAA members to offer sessions per Committee/Champion requests
  - Solicit new technology for video conference and webinars
- Representation of the Region in the YELLOW Initiatives
  - Yellow Brick Roads...to leadership, service
  - Sunshine Ahead...sharing optimism and enthusiasm in financial services...
  - Highlights...Yellow is the most visible color from a distance...what do we see happening across the Region
    - 12 Months July 1-June 30 (all descriptions of yellow - FRESHNESS, HAPPINESS, POSITIVITY, CLARITY, ENERGY, OPTIMISM, ENLIGHTENMENT, REMEMBRANCE, INTELLECT, HONOR, LOYALTY, JOY)
- Execute the tenets of the organization with aplomb, integrity and enthusiasm

### ***Recent Activities***

- Schedule 2020 Spring Region Workshop
  - Friday April 24
  - Location TBD – host site invitation sent to Region
  - Agenda finalization in progress
- 2019-20 NASFAA Credentialing in progress; sessions registered
- 2019 FASFAA Policy and Procedures, By-Laws Revision Committee Volunteer
- 2018-19 SASFAA Communication Committee Volunteer
- 2018-19 SASFAA Legislative Affairs Committee Volunteer
  - Participant in scheduled meetings
  - Ideas-sharing for upcoming advocacy efforts

## Abigail Troche – Region III Representative

Executive Board Report  
Spring 2020

**Pending Report**

## Kylie Gross – Region IV Representative

Executive Board Report  
Spring 2020

N/A

## Jessica Ly – Region V Representative

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To create effective and exciting learning opportunities among higher education administrators.
- To promote collaboration and learning opportunities among professionals.
- To incentivize curiosity and interest in what we do in FASFAA, as well as to enable financial aid professionals to get involved.
- To welcome a diverse workforce into FASFAA as we work to promote the growth of the association.

### ***Goals***

- Recruit volunteers into FASFAA.
- Provide at least one NASFAA credential training workshop every year.
- Provide the highest quality of assistance to Region V members and non-members.
- Communicate with Region V often and purposefully.
- Actively participate in Board Member Calls and Meetings.
- Continue to support FASFAA in all of the association's goals and activities.

### ***Accomplishments***

- Hosted a Fall 2019 FASFAA Region V Workshop
  - 87 attendees
  - \$358 collected for BP Scholarship
  - 1 credential presentation: Professional Judgment
- Participated in FASFAA Nominations Committee
  - Voted on FASFAA Election Slate

### ***Recent Activities***

- Began planning Spring 2020 FASFAA Region V Workshop
  - Tentative date: Friday, April 3, 2020
  - Credential: Need Analysis
  - Other topics: foreign taxes (tentative) and Group Discussion about miscellaneous topics
  - Location: pending confirmation

## Karemah Manselle – Conference Committee Chair

Executive Board Report  
Spring 2020

### **Why am I here?**

- I am here to serve the organization in manner which represents my colleagues and profession well. I am also here to provide guidance to the 2020 Conference Committee, as we plan and execute an amazing annual conference.

### **Goals**

***Personally, I strive to lead the conference committee in manner that will result in a well plan and well executed 2020 FASFAA conference.***

Below you will find the goals developed for the 2020 Conference Committee:

- Our Members  
  
§ By executing a conference that provides the opportunity for our membership to learn about regulations and best practices, while cultivating collegial relationships and networking.
- Our Colleagues in Other Departments  
  
§ By offering collaborative conference sessions that will be of interest to partners and colleagues who are not aid administrators.
- Our Sponsors / Vendors (also members) who support our work  
§ By ensuring vendors/sponsors concerns and input are considered during the planning and execution of the 2020 conference.
- Our Colleagues who are Not Yet Members  
§ By reaching out to a vast array of PSIs in the state to ensure the financial aid community and other stakeholders are aware of the conference and its benefits.

### **Accomplishments**

- ***Since the last board report, the committee has been diligently working to plan the upcoming conference. Our sponsorship chair has done an amazing job working with our vendor partners and we now have 6 platinum level sponsors. Additionally, our VP of Training and Curriculum Coordinator have made all of the appropriate connections for a very well-rounded and robust***

*conference agenda, most notably securing a closing presentation from the Office of the Inspector General.*

***Recent Activities***

- President Barkowitz sent an email on my behalf to the membership that shared some highlights of the upcoming conference.
- Brenda Brown joined the conference committee, as the Conference Website Coordinator. She has updated the website with a welcome letter and the conference committee. Additional information has been sent to Brenda for website updates. However, due to the Memberclicks migration she is waiting to go live with some updates.
- The Color Guard and National Anthem Singer has been secured by the Local Arrangements Chair.
- The charity has been selected. The conference will support the Programs of St. Augustine Society.
- We have secured a welcome letter from the Mayor of St. Augustine.
- We have secured a local speaker to welcome the Membership, School Board Vice-Chair Beverly Slough.
- A tentative agenda has been created and speakers are being secured.

## Kimberly Lent - Federal and State Legislative Chair

Executive Board Report  
Spring 2020

**Pending Report**

## Trey Harrison – Global Issues

Executive Board Report  
Spring 2020

**Pending Report**

## Laura Dickerson – Vendor/Sponsorship Coordinator

Executive Board Report  
Spring 2020

### **Why am I here?**

- To support and assist FASFAA with Opening the Door to members and sponsors.

### **Goals**

- Increase sponsor visibility
- Maintain/Grow sponsorship for conference
- Create a clear and concise vendor program

### **Accomplishments**

- Continually Work with Jerry/Electronic Chair, to update sponsor content on the web page
- Sent several emails regarding the 2020 sponsorship opportunities to garner early submissions and payments for FASFAA
- Coordinated with the Platinum Sponsors on the FI Directors Event in February 11, 2020
- Finalized 5 Platinum Sponsors for the FASFAA Lunch and Learn
- Re-engaged vendor partner group – new meeting 2/14 – lead by Bill Ayers (lenny's departure)
- Over 60% of partners are already paid for FASFAA conference, bringing us to within \$4000 of our 2020 goal.

### **Recent Activities**

- See above... All accomplished within the last two months.

**Book Reflection:** *I am encouraged by the book daily. Brene's people people people focus speaks to me. Its ok to be vulnerable and keep on going, even when you can't predict future outcomes. Finding the potential in people is paramount.*

## Jeff Daniels – Site Selection/Event Coordinator

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To serve the association to the best of my ability and to gain knowledge from other members of the FASFAA Executive Board. I also work to make sound and fiscally responsible decisions relating to the selection of facilities to hold various FASFAA meetings and events.

### ***Goals***

- To select sites for the following events: Clock Hour Workshop, New Aid Officers Workshop, FASFAA Conference, Executive Board meetings, and other events as deemed necessary.

### ***Accomplishments***

- Secured sites for the Clock Hour Workshop (October 2019), New and Intermediate Aid Officers Workshop (January 2020), 2021 FASFAA Conference.

### ***Recent Activities***

- Site visit to Sawgrass Marriott on February 12, 2020, the location of the 2020 FASFAA Annual Conference. I met with Bonnie Oliver to get an overview of the various spaces assigned to us for the 2020 FASFAA Conference.
- Reached out to a few hotels to begin the process of finding a site for the June 2020 Executive Board/Transition meeting.

## OSFA Liaison – Louanne Standley

Executive Board Report  
Spring 2020

### ***Why am I here?***

- Essential liaison between Florida Department of Education, Office of Student Financial Assistance (OSFA) and Florida Association of Student Financial Aid Administrators (FASFAA)
- Provide in depth analysis and impact of all existing and pending legislation on all matters pertaining to state financial aid funding

### ***Goals***

- Attend all FASFAA conference, committee, and board meetings via conference call or in person attendance
- Serve as primary point of contact for FASFAA executive board and all of its members

### ***Accomplishments***

- Continue to participate on all scheduled FASFAA conference, committee, and board meetings via conference call or in person attendance
- Continue to promptly responded to all FASFAA board and membership inquires, questions, and concerns
- Secured participation of Office of Student Financial Assistance at upcoming FASFAA conference
- Facilitated Outreach Representative to provide state update at Clock Hour training.
- Facilitated Director of State Scholarships and Grant Programs to attend FASFAA training

### ***Recent Activities***

- Commitment to attend all FASFAA board Meetings and sponsored Directors Summit

## Kamia Mwango – Volunteer Coordinator

Executive Board Report  
Spring 2020

### ***Why am I here?***

The Volunteer Services Committee is responsible for the facilitation of volunteer recruitment, organization, and mobilization. Responsibilities to encourage and promote volunteerism include: creation and organization of the volunteer database, follow-up with interested members to become volunteers, placement of interested members in appropriate roles within the association, mobilization of volunteers for critical organization functions, and facilitation of approved volunteer appreciation events.

### ***Goals***

- Outreach to all FASFAA volunteers
- Creation and Implementation of various templates for volunteer outreach
  - Calls, Emails, Email merge from database, Volunteer Info Preparation
- Update of online volunteer form based on committee and member feedback
- Creation and Implementation of overall best practices/procedures for volunteer coordination

### ***Accomplishments***

- Creation and collection of Volunteer Information Preparation Form
- Placement of multiple volunteers throughout FASFAA organization (in partnership with President Barkowitz)

### ***Recent Activities***

- Sent lists of volunteers to committee chairs
- If position exists in future:
  - Preparation of Volunteer Coordinator guide
  - Preparation of Volunteer Coordinator position templates

## Jerry McMahon – Electronic Services Chair

Executive Board Report  
Spring 2020

**Pending Report**

## Vanessa Alfaro – Communications and Outreach/Special Initiatives

Executive Board Report  
 Spring 2020

**Why am I here?**

- To increase our social media presence in our community.

**Goals**

1. Have at least 3 volunteers for my committee by 8/30/19
2. Implement “Financial Aid Tip Friday” and have weekly postings to our sites
3. Increase Social Media followers by 30% (August 1<sup>st</sup> we were at 420 now we are at 477) – Goal is 546

**Accomplishments**

1. I have a functioning committee with 3 volunteers (details of their duties below)

Initiative	Description	Who is in charge?
Financial Aid Tip Friday from FASFAA	Every Friday we will post a Financial Aid Tip, by Thursday COB please share with our team for approval and post Friday AM	Dominique Leger
Promoting Region Workshops	We will work with each region rep to create flyers to promote region workshops and post all agendas and save the date	Diana Clavijo
Holidays/Even Pictures	Every Holiday we will create a posting from FASFAA to our followers and we will also post pictures from all FASFAA events (workshops, board meetings, conferences, etc.)	Danielle Walton

2. We have implemented FASFAA Tip Friday
3. We are up to 477 followers (69 followers away from 30% increase)

**Recent Activities**

1. Started FASFAA tip Friday on Sept 20<sup>th</sup> and we have had weekly postings ever since
2. Had our second committee call on Feb 12<sup>th</sup>
3. Have two of my volunteers coming to the Statewide Director’s Meeting

## Ilia Cordero – Financial Literacy /Early Awareness

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To serve as a Financial Literacy / Early FAFSA Awareness

### ***Goals***

- To increase financial literacy awareness through peer to peer learning

### ***Accomplishments***

- Successfully presented at the New aid Officers/ Intermediate aid Officers Work shop in Boca Raton

### ***Recent Activities***

- Successfully presented at the New aid Officers/ Intermediate aid Officers Work shop in Boca Raton
- Assisted in working the New aid Officers/ Intermediate aid Officers Work shop

## Chansone Durden – Newsletter

Executive Board Report  
Spring 2020

### ***Why am I here?***

- Coordinate Newsletter

### ***Goals***

- to publish informative and engaging newsletter

### ***Accomplishments***

- published Fall Newsletter

### ***Recent Activities***

- Working on next newsletter

## Suzanne Evans – Membership Chair (Local Arrangements)

Executive Board Report  
Spring 2020

### ***Why am I here?***

- Membership and Local Arrangements Chair

### ***Goals***

- Quickly and efficiently process new and renewed memberships
- Answer questions regarding membership
- Update membership records and assist with resolution of issues
- Set up Local Arrangements for the FASFAA Conference

### ***Accomplishments***

- Assisted with over 800 membership records and old record cleanup
- Keep the new membership unprocessed records to a minimum on Memberclicks
- Update and/or correct the Region on the active records
- Resolve questions and concerns regarding membership in a timely manner

### ***Recent Activities***

- Arranged for the set up of brochures from the Chamber of Commerce to be included in the conference packet to include visitor's guide, local restaurants, set up discount tickets to outside attractions in St. Augustine.
- Currently creating driving directions to hotel from around the state, transportation from the airport to hotel, approximate driving time from different areas across the state
- Conversation with the President regarding what she wants in the President's suite during the conference and the different theme nights.
- Will be meeting with the hotel regarding different activities offered including golf, tennis, volleyball, set up.
- Researching what to have for flower arrangements on the podium the head table, the centerpieces for the conference guests
- Also contacting the hotel and the closest hospital as the responsible party in case there is an emergency on confirmation of procedures should an emergency occur identify the hotel's contact person

## Merrian King – Scholarship / Charity Chair

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To provide support to the association and serve as the Charity and Bonnie Pirkle (BP) Scholarship chair.

### ***Goals***

- To represent the association as charity and BP scholarship chair.
- To organize and promote a successful Bonnie Pirkle scholarship raffle at the FASFAA annual conference.
- To assist the clock hour chair and region reps with promoting the BP scholarship raffle at annual workshops.
- To found a charity that will bring value and meaning to the association and members.
- Start working on getting volunteers to assist at the scholarship/charity table.

### ***Accomplishments***

- This year charity is “St Francis Housing Crisis Center and Port in the Storm Homeless Youth Center (see attachment)
- Provide the information for this charity to add to the website.

### ***Recent Activities***

- Provide the information for this charity to add to the website.
- The book is a guide to help leaders reach deeper and examine themselves. Then take a chance to be different and think/step outside the box. I learned that weaknesses and fear can give us the strength to successful as a person/leader.

## Help FASFAA Help Others in Need.

The charity for the 2020 FASFAA Conference is:



With your support our goal is to provide much needed items to the crisis center. How can you help, you ask? By providing the following items on the below list:

### PERSONAL HYGIENE

- Travel-sized shampoo/conditioner
- Travel-sized soap
- Travel-sized lotion
- Toothpaste/Toothbrush/Dental Floss
- Deodorant
- Shave gel
- Disposable razors
- Feminine hygiene products
- Band-Aids/First-aid cream
- Brushes/Combs
- Nail files
- New/used coats and blankets (*used items must be clean and in good condition*).

During the conference there will be opportunities to assist in making care bags. (More information will be provided). The **Programs of St. Augustine Society** provide shelter and opportunities to people experiencing housing insecurity and/or facing homelessness. For more information pertaining to this year's charity, visit their website @ [St. Francis Housing Crisis Center](#)

## Donna Kolb - 25+ Year Member Liaison / Leadership Development

Executive Board Report  
Spring 2020

**Pending Report**

## Wayne Kruger – Webinars

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To help my fellow FA professionals to attain new levels of knowledge so that they are better equipped to help students in need.

### ***Goals***

- Has a higher number of webinars than last year, promote them and have varied presenters. To help ingrain the webinar series as part of the FASFAA model thus adding to the benefits of membership.

### ***Accomplishments***

- Had 4 webinars for the fall and have already planned the first for the spring with the grad/professional coordinator.

### ***Recent Activities***

- Planning additional webinars for spring term with a plan to have one each month from now through July so that the new webinar person will not have to have one planned till August/September of the New Year.
  - OSFA Processing / OSFA Update
  - Hot topics in HR
  - The pros and cons of lender lists.
  - Things you need to know if this is your first FASFAA Conference.
    - Have several presenters lined up and will have this one a few weeks prior to the conference.
  - My own professional development – CFAA, NASFAA Credentials, etc.

## Kevin McCrary – Private College (For Profit/Not-for-Profit) Liaison

Executive Board Report  
Spring 2020

### ***Why am I here?***

- Liaison for my fellow ICUF, Profit and Non-Profit Institutions

### ***Goals***

- To provide a voice to our organization

### ***Accomplishments***

- Outreach

### ***Recent Activities***

- Participating in ICUF meeting

## Sandy Shimp – Graduate/Professional

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To create a Graduate Committee who will work together to re-create a FASFAA Grad/Prof presence

### ***Goals***

- Encourage members to sign up for the Grad/Prof listserv
- Create a 'Hot Topic' section on the Grad/Prof page
- Develop a Grad/Prof webinar for the Spring term
- Develop presentations for the annual conference

### ***Accomplishments***

- Committee has been put in place – new members include Patti Corjay from Sallie Mae
- Welcome message and directions to subscribe to Grad-Prof listserv sent out to 714 active and 1077 Inactive members

### ***Recent Activities***

- Grad-Prof Webinar to be provided Feb 19<sup>th</sup>: Academic Calendars: Focusing on the Change in the Federal Definition of a Standard Term. Presented by David Bartnicki.
- Session options provided to the conference committee:
  - Grad-Prof Panel
  - Loan Counseling, Grad Loan Limits and PSLF Program
  - Sallie Mae's survey of 1,597 graduate students – did finances play a part in determining where and when they attend grad school?
  - Regions Bank - Reality Check interactive session to simulate creating a budget after grad school when entering the workforce and starting student loan repayment.

## Teriann Wright – Vocational - Technical Clock Hour

Executive Board Report  
Spring 2020

### ***Why am I here?***

- To serve the FASFAA Vocational / Technical Clock Hour sector with training and networking opportunities in the 2019-2020 school year.

### ***Goals***

- **Our Members**
  - Increase participation and involvement in the Annual FASFAA Conference. Moderator or present at the Annual FASFAA conference. Be an active voice for the Clock Hour sector during the 2019-2020 school year.
- **Our Colleagues in Other Departments**
  - Find more opportunities to invite school departments to attend the Annual FASFAA Conference.
- **Our Colleagues who are Not Yet Members**
  - Expand the Annual FASFAA Conference attendance to others to attend these trainings as well as networking in the Financial Aid arena.

### ***Accomplishments***

- Preparing for the Annual Conference on May 26-29, 2020 by assisting the Conference Committee find Clock Hour session presenters and moderators. Also, assist with other volunteering duties as assigned by the Conference Committee. Participate in meetings with the Training Committee on a monthly basis. Assisted with the content of submitting the NASFAA Gold Star Award related to the successful 2019 Clock Hour Workshop 153 participants attended.

### ***Recent Activities***

- One Clock Hour Volunteer Committee email sent in February (7 volunteers on my committee).