



NEWSLETTER—SPRING 2019 / EDITOR: VANESA ALFARO

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Dear FASFAA Family!

In early 2018-19, you each were invited to take a journey with us on the “Roadmap to Success”. What an amazing ride it’s been. This year’s roads and avenues has led to many training opportunities. Our wonderful Training Committee, Regional Representatives, Executive Board, and Conference Co-chairs were successful in laying the pavement of events and activities to benefit every Financial Aid Professional! Whether you are 2-year to 4-year, public to private sector, new aid to executive/director level, technical/clock hour, undergraduate to graduate/professional level there has been training sessions and opportunities for all! Some of the opportunities included Regional Workshops, Webinars, our approaching Annual Conference, and more. I truly hope you enjoyed what FASFAA had to offer this year. I also encourage to you to get involved, as your volunteerism can be greatly beneficial to our financial aid community!

It has been an honor and pleasure to serve as your President for 2017-18 and 2018-19.

Thank you for your continued support of FASFAA and we will see you at the next stop on our “Roadmap to Success!”

Sincerely,

David Alexander, MBA





Bylaws and Policy and Procedures

Committee

The FASFAA Bylaws and Policy and Procedures Committee have been busy revising and updating the Bylaws and the Policy and Procedures. This has been a learning experience for everyone on the committee. During the FASFAA Annual Conference this year, we will be voting on the revised FASFAA Bylaws. If you have not had the opportunity to take a look at all of the updates and changes, I encourage you to go on the FASFAA website and review the bylaws and vote yes or no to accept them. The committee has worked hard to make sure all of the language in both documents is up-to-date and accurate. So get out there, take a look at the bylaws and cast your vote.

Region V 2019 recipient of FASFAA's Bonnie L. Pirkle Scholarship

In 1997, FASFAA established its own scholarship program as a commitment to assist deserving students in their pursuit of a post-secondary education. The scholarship was named in memory of a long-time FASFAA member, Bonnie L. Pirkle, who exemplified the highest personal and professional qualities, and who embodied the spirit of camaraderie among FASFAA members. Bonnie passed away in 1994 at just 53 years of age. She had dedicated more than 25 years of service to our profession. Bonnie touched the lives of everyone she knew and loved – from students who benefited from her personal attention and wisdom, to colleagues whom she welcomed into our association.

Through the generosity of its members, FASFAA is able to award scholarships annually to assist students in all regions of the state of Florida. Each elected official on the FASFAA Board has the opportunity to provide a scholarship to a deserving student from his or her region. As the South Florida Representative, it is my honor and privilege to name this year's FIU recipient of the Bonnie Pirkle Scholarship.

Nicolle has been a student employee in the Financial Aid Office since 2016. She is a member of the Honors College, and a rising senior, majoring in Public Relations and Applied Communications. Her academic achievements at FIU are astounding, and her contributions to the Financial Aid Office are impactful. Nicolle provides exceptional service to our students and families through our Live Chat platform. She is able to simplify complex financial aid regulations to ensure students understand the answers to their questions. Nicolle's supervisor states: "Her greatest attribute is her positive attitude which allows her to establish great working relationships. She has proven an incredible capacity to learn and adapt at a fast pace in any given situation. Her growing knowledge of financial aid matters and professionalism make her an excellent candidate for this honor."

Please join me in congratulating Nicolle Rincon as the Region V 2019 recipient of FASFAA's Bonnie L. Pirkle Scholarship!



FASFAA TRAINING REPORT

FASFAA are you ready?! Our annual conference is only a short time away. I would like to thank the Conference Co-Chairs, Nathan Basford and Merrian King for all their guidance. The conference committee has been hard at work for months making sure we deliver a jam-packed agenda with some fun mixed in. Thank you to all the presenters and moderators and all the people that have worked with me behind the scenes.

This year's conference has various tracks for our new FAA's and our seasoned veterans or executives.



Executive



Financial Literacy/Default Management



Clock Hour



Grad/Professional



Technology



General Topic/Financial Aid Administrator



New Aid Officer



Diversity

As we continue to mention, the best way to help FASFAA succeed is to volunteer ; get involved in any way you can, the rewards are invaluable!

Nadine Bailey, FASFAA VP of Training





Volunteering

--(Author Unknown)

Doing the good you can,
by all the means you can,
in all the ways you can,
in all the places you can,
at all the times you can,



Hi FASFAA Family,

Remember health is wealth and we should all strive to be the best person we can be!

Here are some tips that can help us stay in tip top shape, both physically and mentally:

- * Start the day off right by eating a nutritious breakfast
- * Exercise regularly and remain active
- * Enjoy a good dose of the sun and take in some vitamin D
- * Get enough sleep (Preferably 8 hours per night) to ensure we're ready for the next day's events
- * Try to reduce stress as much as possible
- * Drink plenty of water
- * Laugh and try to be as happy as you can



Best of luck on your journey

Sincerely,

David Alexander, MBA

FASFAA President

Observations from a “World” Traveler: What Walt Disney World Can Teach FASFAA

By Daniel T. Barkowitz, FASFAA President-Elect

Some of you may know that I am a (obsessed) fan of Walt Disney World. From my first visit 40 years ago as a 9 year old, to my (sometimes) weekly visits now that I live within walking distance of the park, I have spent a lot of time exploring, enjoying, and observing the resort. In my time as a (super) fan, I have also found that there are many lessons that we at FASFAA can learn from Walt Disney World, and I want to offer a few of them for your consideration.

Lesson #1: Everyone has a favorite as Disney, and every person’s favorite is different. And sometimes your favorite thing changes.

I am often asked to pick my favorite park and while my cop-out strategy is to name the last park I attended, I really can’t choose just one. I like something different about each of the parks, and my favorite attraction is always changing. But I do have a favorite. Right now it is Flight of Passage in Pandora in Animal Kingdom. While the concept isn’t that new (3D Imax movie, motion simulator), something about the combination of the two presents a brand new experience which is much better than the sum of the parts.

I like to think that FASFAA is the same way. Each of us may have a favorite thing about FASFAA. Maybe for you it is the Annual Conference, or the Regional Workshops. Maybe it’s the information you receive from our Webinars, or maybe it’s the connections you’ve made with other FASFAA members. No matter what your FASFAA moment is, though, I’m sure like me that you have one. It also may change over time. And like Disney World, we invite you to try all of our experiences at FASFAA; you never know when your participation in a new avenue of connection might introduce you to a new favorite.



Observations from a “World” Traveler: What Walt Disney World Can Teach FASFAA (cont.)

Lesson #2: The best way to have the most meaningful experience is to be a co-creator in your own experience.

There are two kinds of travelers to Disney World – the ones who make a plan for their visits arranging Fast passes, meal reservations, and trip itineraries, and the ones who just show up the day of their visit and stand around trying to decide what to do next. Guess which one I am.

There is value to spontaneity, and I always leave time in my plan for those unexpected moments when we come across a character we weren’t expecting, or we see an attraction with a shorter line that we want to visit right now. That said, the benefits of having a plan are tremendous. Often I have the chance to skip lines, eat at restaurants that are “sold out” and do more in a day at Disney than many people do in a week.

Plus even more fun, I have the opportunity to “play” by planning my visit. The time I spend researching, reading, and preparing for my visit to the park is itself “fun time” because it allows me the opportunity to be a partner in the creation of my own experience. I get to curate and plan for my own enjoyment, and my contribution guarantees the outcome meets my hopes and expectations.

Consider this your invitation to do the same with FASFAA. By joining a committee, getting involved in your Region, attending a Regional Workshop, signing up for a Webinar, you too are becoming a partner in the creation of your own FASFAA experience. If there is a training topic that really interests you, volunteer to be a part of the training committee to research how we can train others about it. If you are really motivated by legislative advocacy in a year when Reauthorization is likely, become a part of our Legislative Concerns committee and have a voice in FASFAA’s positions on Federal and State issues. If you’ve always wanted to see how the “magic” happens, consider becoming part of our Electronic Services or Membership Committees who really do have responsibility to ensuring that FASFAA is in touch with each of us. No matter what your interest there is a place within FASFAA that can accommodate you. Step in, and help co-create your FASFAA experience.



Observations from a “World” Traveler: What Walt Disney World Can Teach FASFAA (cont.)

Lesson 3: Each customer is in a relationship with Walt Disney World, and each individual customer interaction is just one step in their evolving relationship.

The House of Mouse practically invented the art of Customer Relationship Management. The Disney Resorts understand that each customer represents a sizable financial investment and that loyalty to Disney World means repeat business. If a family of four stays on-site at a modest resort for four nights, and visits the parks for three days, with food, tickets, and modest souvenirs, the cost for the trip is easily over \$1500 (not including travel). Recognizing that many of their customers return year after year, it is not hard to see how a family’s investment can stretch to \$10,000, \$20,000 or even more in their lifetime relationship with the company. So when a cast member is asked to work with a family to resolve a problematic situation, the cast member is reminded that what is at stake is the relationship, not the individual item at issue.

And Disney World is rewarded with great customer loyalty. Customers return, and tell their friend about their experiences, and even write articles for professional associations extolling the virtues of the company (oops!). And this builds more customer loyalty.

I am hopeful that you too view your relationship with FASFAA as evolving and long-standing. Whether this is your first year as a member or your thirty-first, you are an important part of FASFAA and we couldn’t exist (literally) without you. As a member of the Executive Board, I can assure you that we recognize the importance of each of our over 700 individual members, and we want to be in deep relationship with you. We want to hear your ideas, provide the training and other services you need, and continue to strengthen and deepen your connection to your Florida colleagues and to your profession. We want to ensure that FASFAA is a place for all, regardless of your job level, your institution type, your background, or your years of experience. As your President-Elect, I invite you to step in to FASFAA in the coming year. We have “magic” waiting for you.

And if you ever want to visit the parks, let me know. I am always happy to spend a few hours in my magical place.

FASFAA News for Region I



Region I met at the University of West Florida's beautiful campus on March 8th, 2019. Twenty six FASFAA members attended and spent the day learning about diversity, transient financial aid, student orientation, Generation "Z", and FERPA. The Bonnie Pirkle raffle generated a \$210 prize pool, which resulted in a \$105 donation to the scholarship fund.

A (Short) History of Needs Analysis, and Why Needs Analysis Matters

Daniel T. Barkowitz

“To give away money is an easy matter, and in [anyone’s] power. But to decide to whom to give it, and how large, and when, for what purpose and how, is neither in [everyone’s] power, nor an easy matter. Hence it is that such excellence in rare, praiseworthy and noble.” - Aristotle, *Nicomachean Ethics*, Book 2, Chapter 9, 350 BCE (est)

The Financial Aid Profession may seem like it has been around forever. As you think about the profession in which we toil, it seems like it has a long and rich history, but the truth is that we are a young field.

In preparing my session for this year’s FASFAA Conference entitled “Sharpen Your Pencils: A History of Needs Analysis,” I have been examining the beginnings of our modern profession and have discovered that much of work can be traced back to the 1950s, less than 70 years ago. While higher education in America goes back much farther (the establishment of Harvard in 1636), the first scholarship created was established at Harvard almost at the same time. Funded by Anne Radcliffe, Lady Mowls of London, in 1643 left a bequest, the scholarship supported students with need admitted to Harvard College.

But here was a problem. Who has need?

For literally hundreds of years, this question was left at the hands of individual college faculty and staff. It wasn’t until 1953 at a meeting of the College Board Symposium that John Monro presented the first proposed model for what we know of today as needs analysis. Harvard’s Crimson reported on a meeting of 150 colleges shortly afterward to adopt Monro’s plan.

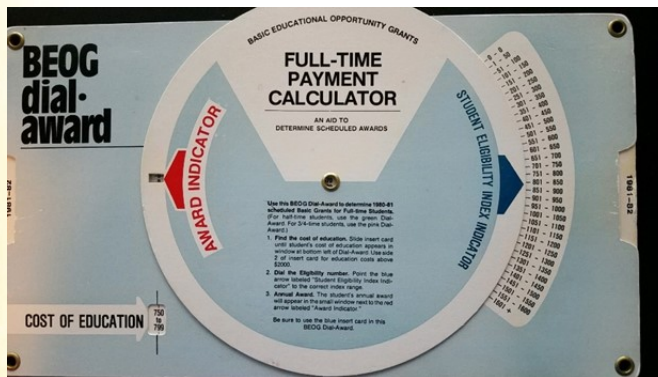


A (Short) History of Needs Analysis, and Why Needs Analysis Matters (cont.)

“The present proposal calls for the colleges to form a set method of determining financial need. Possibly a clearing house would be instituted to set the amount required by the individual student. Dissatisfaction with the present bickering over students prompted the interest in reorganization. Administrators feel this pressure has caused colleges to overlook financial need in an attempt to get geographic distribution and possible future ‘Who’s Who’ members.” (<https://www.thecrimson.com/article/1953/10/22/college-board-meeting-to-discuss-monro/>)

Does any of this sound familiar? It should. We have been discussing the best way to determine a family’s “ability to pay” since then, and, much like Aristotle predicted, the attempt to decide how to give away scholarship dollars, to whom, and for how much are indeed

rare and praiseworthy skills.



The Federal Government didn't really get involved in the conversation until the establishment of the National Defense Student Loan (later the Perkins Loan) in 1958. Under the terms of the National Defense Education Act of 1958 (the authorizing law) students were eligible if they were "...in

need of the amount of the loan to pursue a course of study" at their institution. While the law did address the rationale for creating financial aid program ("We must increase our efforts to identify and educate more of the talent of our Nation [by giving] assurance that no student of ability will be denied an opportunity for higher education because of financial need..."), it was silent, though, on the concept and definition of need.

Note that everything I've discussed so far in this article took place before the Higher Education Act of 1965 (which is viewed by many of us as the starting point for our collective financial aid history). There is much more to learn about the History of Needs Analysis including the years of multiple application forms for financial aid (you mean there was a time before the FAFSA?), the differences between FM, UM, CM, IM and GM (all different kinds of methodologies), and a definition of the use and purpose of a BEOG wheel.

Come to the session on the History of Needs Analysis at this year's FASFAA Conference to learn more about the history of our young profession

FASFAA News for Region V

Katie Conrad, Region V Representative

Region V conducted two very successful workshops this year! The Fall Workshop was held on November 9, 2018 at the Keiser University Pembroke Pines campus. Sixty-three members attended, representing 21 different institutions. Through our workshop registration we are excited to welcome 20 brand new Region V members to the FAFSAA Family!

For the second time, our Fall Workshop was a NASFAA Authorized Training Event. This allows our participants to take a NASFAA exam and earn a NASFAA Credential – free of charge! Our credentialed trainer, Sara Kaufman, used the NASFAA SAP curriculum for training and led a lively discussion about best practices in Satisfactory Academic Progress. We also offered sessions on 2019-2020 Application Processing, Verification, and the OSFA Update. Our presenters Sara Kaufman, Brenda Brown, Anh Do, and Adelfa Ukenye were key to a successful workshop and for drawing a huge crowd!

The Spring Workshop was also a NASFAA Authorized Training Event. Based on overwhelming feedback from the fall workshop, the topic of Return to Title IV was selected. Katie Conrad was the credentialed trainer and spent the day teaching R2T4 to a crowd of 59 members. Again, we were pleased to welcome many of the attendees as new members to our association. President

-Elect Daniel Barkowitz joined us virtually through video to welcome members to FAFSAA and to encourage volunteerism. His message moved several to volunteer as moderators for our conference.

During the workshops, we held “split the pot” raffles to raise money for the Bonnie Pirkle Scholarship Fund.

Thanks to our very generous participants, Region V is proud to contribute \$240 toward the scholarship fund for 2018-2019.

I would like to thank Yalisnette Segovia, Director of Financial Aid at Keiser University, for arranging the site for both of our workshops, and Jennifer Ruiz & Jessica Herrera, Financial Aid Coordinators at FIU, for assisting with all of the planning. These volunteers are what make the workshops a success.

On a final note, thank you for allowing me to serve the last two years as the Region V Representative on the FASFAA Board. Being new to Florida in 2016, the FAFSAA membership welcomed me with open and trusting arms. I am proud of the accomplishments we have made in Region V, and I look forward to what we will do in the years to come.



FASFAA News for Region III

By: Sedrick Brinson

The Spring 2019 Region III Workshop was Friday, April 5, 2019 at the Valencia College, District Office. The workshop was a great success and we had over 30 attendees.

We had many interesting topics covered at the workshop including: The Oz Principle; What is Collaboration?; A Whack on the Side of the Head; An Animals Approach to Conflict; and State Updates.

The winner of the 50/50 raffle for the Bonnie Pirkle Scholarship Fund and we raised \$64 toward the scholarship fund. The 50/50 raffle winner was Pamela Williams-Gruen from the University of Central University, which she donated back to the scholarship. Thank You and Congratulations Pamela!

I would like to thank all the presenters who “volunteered” to present during the workshop. I could not have done this without your willingness to help! Also, a special thank you to Valencia College, District Office staff for the use of the 5th Floor Conference Room.

As we move forward, always remember the best way to help the FASFAA organization succeed is to volunteer and get involved any way you can. The reward is invaluable and the experience is priceless! Please make sure that you subscribe to the Region III listserv on FASFAA so you can get email updates. Thanks again!



ACTIVITIES

Conference Events:

- ⇒ **Tuesday, May 21st (6:30pm –8:30pm)** - Reception & Family Night (Karaoke)
- ⇒ **Wednesday, May 22nd (7:30pm—9:30pm)** - Bingo & Game Night

*Something for
EVERYONE!*

Hotel Activities

- Lazy River, Waterslides & Pools
- Island & Beach Excursion
- Lawn Games & Rock Climbing Wall
- Boardwalk

Shopping:

- Coconut Point Mall
- Miromar Outlets
- Gulf Coast Town Center
- Waterside Shops

Outdoor Activities

- Everglades National Park
- Barefoot Beach Preserve County Park

Sports:

- Hertz Arena
- Alico Arena



TOP 10 RESTAURANTS IN BONITA SPRINGS

(as per Naples Local Expert Chelle Koaster Walton)

⇒ **10th— OLD 41 RESTAURANT**

25091 Bernwood Dr, Bonita Springs, FL 34135

Daily 7am-2:30pm

⇒ **9th— COCONUT JACK'S**

5370 Bonita Beach Rd, Bonita Springs, FL 34134

Daily 11am-10pm

⇒ **8th— FIGS GRILLE**

25987 Tamiami Trail #109, Bonita Springs, FL 34135

Daily 4:30pm-9pm

⇒ **7th—DEROMO'S GOURMET MARKET & RESTAURANT**

26811 South Bay Dr. #170, Bonita Springs, FL 34134

Daily 11am-10pm

⇒ **6th — TAG THE AMERICAN GASTROPUB**

23161 Village Shops Way, Estero, FL 33928

Sun-Thurs 3pm-9pm

⇒ **5th— TARPON BAY AT THE HYATT REGENCY**

LOCATED AT OUR HOTEL

⇒ **4th—A TABLE APART**

4295 Bonita Beach Rd., Bonita Springs, FL 34134

Wed-Sat 5pm-9pm

⇒ **3rd— ROY'S BONITA SPRINGS**

26831 South Bay Drive, Bonita Springs, FL 34134

Sun- Thurs 5pm - 9pm

⇒ **2nd— WYLD'S CAFÉ**

4271 Bonita Beach Rd., Bonita Springs, FL 34134

Mon-Sat 4:30pm-9pm

⇒ **1st— ANGELINA'S RISTORANTE**

24041 S. Tamiami Trail, Bonita Spring, FL 34134

Mon-Sat 4pm-10pm

