



NYSFAAA Executive Council
February 1, 2016
Albany, New York

Call to Order & Roll Call

President Kerrie Cooper
President-Elect Darrin Rooker
1st VP- Jan Scheutzow
2nd VP- Howard Leslie- excused
Secretary-Kathy Flaherty
Treasurer- Kerry Lubold
Treasurer-Elect Robert Zasso
Region 1 Kathy Michalski
Region 2 Margaret Christian-excused
Region 3 LaSonya Griggs
Region 4 Michelle Fountaine
Region 5 Diane Donohue
Region 6 Melanie Williams-Bethea
Region 7 Amy Thompson-excused
Region 8 Todd Moravec

Guests: Laura Worley: call-in
Lisa Simpson
Scott Atkinson: call-in
Sue Mead: call-in
Susan Godreau: call-in
Kristina DelBridge: call-in

Kerrie Cooper called the meeting to order at 9:00 am with a quorum of Executive Council present.

Approval of December 9, 2015 Minutes

A change to the President's report under PPY was made: The current TAP plan for 2017-2018 is to have the TAP application available with the FAFSA allowing for the demographic data to be captured. If legislation is passed to align income year with federal regulations, prior prior year will be used to determine award. If legislation is not passed for the state to use prior prior year when 2017-2018 FAFSA is available on October 1 2016, students will report 2016 income from the FAFSA.

Motion: A motion was made by Todd Moravec, seconded by Kathy Michalski to accept the minutes as amended. There was no discussion. The motion was passed with all in favor, no oppositions and no abstentions.

Treasurer's Report - Kerry Lubold

- **Budget vs. actual** report and balance sheet were distributed
- **Copyright and Trademark Status** – Our trademark/service mark application for acronym (NYSFAAA) only was submitted and accepted. It is currently in a pending status. Do we want to trademark our logo? If so, we should probably wait to be sure our current application was filed correcting and becomes approved before we proceed with the logo.
- **Revenue Sharing** – Distributions occurred in January.
- **2014-2015 Audit Status** – Our auditors are nearing the end of their review. Kerry had a conference call with Alicia (auditor) on Friday, January 22 and they reviewed the remaining outstanding items. Most of those have been resolved. Most of the findings relate to lack of supporting documentation such as checks being written without invoices or expense reports, and money being collected without summary detail. It's probably a good idea to have a conference call with the regional treasurers and chairpersons to review proper recording of financial transactions. Many thanks to Pat Johnson and the regional treasurers for their hard work in collecting the necessary documentation for quarterly reporting. Rob Zasso has begun the collection of 2015-2016 reports and will help with the financial reporting refresher training.
- **Chart of Accounts** alignment with financial statements – Alicia and Kerry plan to work together later this year on a re-alignment of NYSFAAA accounts and financial statement operation categories.
- **Investment Committee** – Will be meeting with Robert Bell the afternoon of Monday, February 1, 2016 to review NYSFAAA investments, recent trends, future goals and discuss recommendations. The investment committee includes: Kerrie Cooper, Amy Thompson, Todd Moravec, Rob Zasso, Darrin Rooker, Tom Dalton and Kerry Lubold.
- **Development Committee** – Tami Gilbeaux has submitted several applications for grants. Most grant opportunities do not support operational activities. She will be in contact with Sean Hudson and LaSonya Griggs, two members who expressed interest in helping out with development activities. They had a discussion about the likelihood of current development efforts realizing a positive net return. Tami is going to research how other statewide and/or regional organizations support their efforts. Kerry suggested to Executive Council that NYSFAAA have an out-of-the-box discussion regarding what we see as our development goals and ways to achieve those goals. Our desire for grant support does not make it a reality. We should probably brainstorm ways of using current revenue better, expanding our fundraising activities and consider revenue opportunities in conjunction with in-person and web-based training.
- **Budget Committee** – Preliminary 2016-2017 budget discussion will be a later agenda item.
- **Scholarship Committee** – Cookbook sales are continuing. It would be really helpful if each region gathered a supply of cookbooks to have available for purchase at regional meetings and events. It is much more likely that members will buy one if it is in front of them, versus having to reach out to Debbie Evans to request one and then

deal with mailing costs, etc. \$4345 for scholarships was raised at Conference. They hope to expand committee membership to have two representatives per region

- **Direct EFT Payments** – A request was received from Queensborough Community College to sign up for EFT payment for membership dues. We currently do not accept EFT. It's complicated for many reasons. Is it something we need to consider?

Discussion: Executive Council has no major concerns at this point. Hard to identify who payment is from/for. Before considering we should research options. Third party companies will help with this at a cost. We will monitor situation to see if more than one school has this request.

Questions: Have all of the regional financial reports been received?
Yes for 2014-2015.

For 2015-2016 still need documentation from Region 6. Just behind with one Region for Quarter 1 report; Quarter 2 report deadline has not come
Rob is asking for more documentation up-front from regions instead of waiting for the audit to request documents. 2015-2016 should be much easier.

Lisa Simpson will get Tami Gilbeaux on state-wide procurement list, to check if there are any services available for NYSFAAA

Motion: A motion was made by Diane Donohue, seconded by Sonya Griggs to accept the Treasurer's report. All were in favor with no oppositions and no abstentions.

President's Report – Kerrie Cooper

- **EASFAA Executive Council** meeting is scheduled for March 3rd and 4th in Hartford, Connecticut. The Agenda will probably relate to the Conference, but Kerrie has been asked to be on the Long Range Planning Committee. EASFAA is looking for nominations for the NASFAA regional (EASFAA) award. Nominee does not have to be a financial aid professional, but must have made an outstanding contribution to regional level activities. Kelly Morrissey needs to have any nominations by February 1st. EASFAA's 50th Anniversary will be May 22-May 25 in Atlantic City, New Jersey NASFAA celebrates their 50th Anniversary this year also.
- **Perkins legislation** – shortly after the December Executive Council meeting new Perkins Loan legislation compromises were reached.
 - Program is extended for 2 more years (5 originally proposed)
 - Grandfather clause out
 - No grad students
 - Direct Subsidized and Direct Unsubsidized loans must be used first
 - There is one more year of new borrowers
 - Aid officers are asked to wait for guidance from the Department of Ed before proceeding
 - There may be some restrictions on identifying the type of borrower
- **NASFAA gift**
 - NYSFAAA is considering what would be appropriate for the anniversary gift
 - Talked with Cheryl Fisher from HESC
 - Needs texts for a proclamation; Lisa Simpson will help with this
 - Donation to Dallas Martin endowment (NJ doing \$100)

Motion: A motion was made by Todd Moravec, seconded by Melanie Williams-Betha to contribute \$250 from NYSFAAA to the Dallas Martin Endowment and offer a proclamation to NASFAA on the occasion of their 50th Anniversary.

Discussion was open: Are we presenting anything to EASFAA for their anniversary. Kerrie will check with Bill Cheetham and Irv Bodofsky to see what is being done.

A vote was taken and the motion was passed with all in favor, no oppositions and no abstentions.

- Received an inquiry from State Senator Kenneth LaValle, Chair of the New York Senate Higher Education Committee regarding the TAP white paper. The question was about the possibility of using the FAFSA EFC and assets to determine TAP. (The senator has constituents from Long Island who were concerned about TAP eligibility with this formula.) Kerrie explained that the primary home is not included in the EFC formula and asked about the use of prior prior year. Sue Mead was able to get Kerrie an appointment with his office during the legislative visits.
- NYSED update – none at this time
This issue is on using an associate's degree as proof of high school completion. NYED has not changed their definition so HESC cannot update either. Schools can print the website definition with a date as documentation of their policy.

President-Elect's Report – Darrin Rooker

- **Election Committee**
 - First Vice-President, Second Vice-President and Secretary Offices are up for election this spring. Most regional election committee representatives have been identified, but are still waiting for Regions 1 and 6
 - Will meet in February and start candidate solicitation
- **Governance**
 - **Assessment of Long Range Plan and committee reports will begin**
 - It was suggested that the Governance Committee send a survey to all committee chairs to ask if they have knowledge of assessment report/goals and objectives for their Committee, have they met since September of last year, identify primary projects/accomplishments and goals and objectives for the next year, do they have the necessary resources to meet their goals and objectives
 - Will use the responses as part of the Governance report
- **Alcohol Policy**
 - Governance has no problem with the policy, concentrated their review on the procedure
 - Governance Committee provided the following report:
 - In response to a NYSFAAA Executive Council request to review the association's handling of exceptions to the alcohol policy, the Governance and Ethics Committee reviewed the current policy and its procedural application within the association. It was found that the current policy states that NYSFAAA's Executive Council may authorize the purchase and serving of alcohol at NYSFAAA sponsored events, as long as the authorization is done prior to the event and is appropriately budgeted for.

The Governance Committee does not feel that any change in the alcohol policy is necessary at this time. However the committee does feel that written procedures do need to be approved by Exec. Council to more clearly articulate to whom the appeal is to be submitted and manner in which the request should be submitted.

Recommended Procedures:

Requests for the purchase and serving of alcohol are allowed in accordance with the associations Alcohol Policy; such requests should be directed to the NYSFAAA President and/or Secretary. The request should be done in writing (paper/electronic) by one of the individuals officially recognized to be responsible for organizing the event. The request should be submitted more than 10 days prior to the Executive Council meeting preceding the event and include as much detail as possible as to: the purpose of the request to serve alcohol, estimated cost of the alcohol to be purchased (to insure appropriate budgeting), length of time alcohol is to be served/the number of drinks to be served to individual members.

Approval or denial of alcohol request will be discussed and voted on by the Executive Council. The decision will be based on the merit and document totality of written request.

Motion: A motion was made by Todd Moravec, seconded by Kathy Michalski to discuss the proposal

Discussion: the following points were raised

- o Can the number of drinks be monitored? Answer: the request should be submitted with enough details so that the reasonableness of the request can be considered; for instance the request might include whether the event includes an open bar or limited number of drinks.
- o Request should be submitted at least 10 days in advance of the event
- o Change the use of the word insure to ensure
- o

Motion: A motion was made by Darrin Rooker, seconded by Rob Zasso to approve the policy and procedure regarding the exceptions to the alcohol policy as amended. The motion was passed with all in favor, no oppositions and no abstentions.

• **PPY and TAP**

- o Darrin participated in a conference call with CICU last week
- o Pushing proposal to increase TAP to \$6500 annually. Trying to get legislators to focus on cost of education. Setting the goal but don't know when it would be reached. Legislator believes that moving to prior prior year will increase cost which is a concern. The executive side of house should find funding for additional cost.
- o Internal assessment and cost analysis was done at HESC and forwarded to the legislature. Talked about use of Professional Judgment with TAP and it was added to their list of goals.
- o Coming up with legislation to make NY shopping sheet less burdensome. As it stands a student could get 3 letters: school award letter, Federal Shopping Sheet and State Shopping Sheet. Start with exempting grad students
 - Kerrie will discuss this later and has been asked if NYSFAAA will respond during comment period

Secretary's Report – Kathy Flaherty

- Reminder for regional representatives to provide written regional reports at in-person meetings
- **School Outreach- LaSonya Griggs**
 - Largest number of sites were hosted this year: 49 sites with 55 different events
 - Some snow date rescheduling was needed
 - Biggest challenge this year has been a shortage of volunteers
 - Lots of funding to spend this year
 - \$24,000 to spend; must be spent by September
 - College Goal New York folder was distributed
 - Prior prior year will affect filing dates
 - Many private schools are not changing dates for the first year
 - Combine admissions and financial aid application filing workshops
- **Technology, Innovation and Communication Committee**
 - Last met early December 2015
 - Conference presence
 - Committee membership always fluid
 - Possible survey of membership to query needs and suggestions
 - Discussion on website improvement
 - Fresher look is needed. Revamp?
 - Headings are hard to navigate; too many choices
 - What are top 5 reasons to use the website
 - If regions use the web for an event registration it can be billed back to the region
 - Will contact ATAC for costs for future use with budget discussions.
 -

Second Vice-President- Kristina DelBridg

- **Upcoming events**
 - February 18: Verification 2
 - February 26: Statewide event
 - March 10: High School validation
 - March 21: Verification issues
 - April 14: VA benefits
 - May 12: PPY
 - June 9: Working with undocumented students
- **Statewide Training event (February 26)**
 - Tested ok, locations and arrangements are set
 - 236 registrants so far
 - Comment:
 - combined event should be one of the highest attended meetings each year
 - striking a balance between regional meetings/training and statewide training events is always a challenge
 - How smooth was the registration for the joint EASFAA/NYSFAAA training? Answer: there were some issues which can be discussed during future planning of such events.
 - There will be another NASFAA/NYSFAAA forum in New York in early May, 2016. Many are involved in planning and facilitating this event with Justin Draeger. Possible topic will be the financial aspect of student borrowing.

- Two new committee members have joined. The Committee is always looking for committee support, especially during the Q&A for each webinar. Contact Kristina, if interested.

First Vice-President's Report – Jan Scheutzow

- **Membership**
 - For the 2015-2016 year: 1195 members
 - Goal is 1325, short 130 members
 - Dues goal for 2015-2016 is \$88,260; at \$77,800 now so short about \$11,000
 - 90 outstanding bills
 - On track with \$84,000 income, but may pick them up with webinar training
 - Melanie Williams-Bethea raised the issue of Institutional vs individual membership (from their region)
 - Thoughts: managing people moving between institutions with membership vs no institutional membership
 - Split the fee between institution and member
 - Per webinar fee
 - Ask regional representatives to solicit regions for what they would like to see happen next year: What are you looking for from NYSFAAA
 - Advocacy can be an area for regional involvement

HESC Update - Lisa Simpson

- HESC Update distributed, attached to end of these minutes
 - Nothing in Governor's address about any new programs
 - APTS training is being planned, perhaps an interactive webinar. Send training topic ideas to Lisa Simpson
 - There were 12 School Counselor workshops held, which were successful

Old Business

- **Novice – Lisa Simpson**
 - Working with Theresa Weimer as the Chair
 - Mt. St Mary in Newburgh was selected site for this year's Novice Training; more central location
 - Metro North runs to Beacon so it is easily reached
 - Dates are June 5 – 9, 2016/ Registration begins at 10:00 am on Sunday and program begins at 2:00 pm; ends Thursday at 2:30 pm
 - Those who wish to arrive on Saturday will have a check box on the registration form for this option
 - Most staffing in place; still need some large group presenters
 - Large group power points will be needed earlier to be included with manual. This should save on printing costs.
 - Would like to increase registration fee to \$625 (up \$25)

Motion: A motion was made by LaSonya Griggs, seconded by Rob Zasso to set the fee for 2016 Novice at \$625

Discussion points:

- No additional charge for early arrivals
- Part of fee increase is for the new membership dues

- When dues increased from \$50 to \$60 annually, the Novice fee went from \$580 to \$600

A vote was taken and the motion to increase the Novice Training fee to \$625 was passed with all in favor, no oppositions and no abstentions.

- **Conference 2017- Melanie Williams-Bethea**
 - Questions raised in October about proposals were answered:
 - The State per Diem rates is less than the Westchester Marriott room rate.
 - Attendees going to other sites will have a conference code

Motion: A motion was made by Kerry Lubold, seconded by Rob Zasso to approve the Westchester Marriott as the site for the 2017 NYSFAAA Conference.

Discussion:

- What is the regular room rate (about \$219)
- What is layout (many areas to socialize)
- What is the food requirement (\$70,000 guarantee)
- Do you foresee any issues with attendance (no, more day-trippers)
- Challenged on finding a site that is affordable
- AV will use some of Laura Worley's suggestions from the Buffalo conference
- Hope to have Wi-Fi available by 2017; guest rooms will have complimentary Wi-Fi
- Minimum room block number (still negotiating)

A vote to approve the Westchester Marriott as the site for the 2017 NYSFAAA Conference allowing the Conference committee to continue planning for 2017 was taken. The motion was passed with all in favor, no oppositions and no abstentions.

Melanie was asked to inquire whether moving the Conference to November would affect the room rates. Discussion will be held later on the projected number of participants and the registration fee.

- **Conference 2015 - Laura Worley**

Conference Chair Overview (taken from Conference 2015 final report)

The 47th annual NYSFAAA Conference was held in Buffalo, NY and the first time this region utilized the Buffalo Niagara Convention Center for all meetings and meals. Hotel accommodations were located across the street at the Buffalo Hyatt Regency. The facilities were attached by an over the street walkway which was appreciated when the weather was poor. Not an easy walk but it did keep conference attendees out of the elements. Meeting space was plentiful, and the food was exceptional. The Hyatt accommodations were nice. Both event planners (BNCC, Hyatt) were accommodating and easy to work with. I would recommend reviewing the post-conference survey to read the attendee feedback on hotel and meeting space. Overall, the feedback was good on the survey, the feedback during the conference and at closing was exceptionally positive for the conference in its entirety. The Region 1 Conference

Committee was very happy, and proud for the accomplishment of putting on an informative, well planned, learning and networking event. To have leaders in their profession as key speakers was especially rewarding: Jeff Baker, Justin Draeger, Brett Leif, and Bruce Weinstein.

The conference had a total of 252 registered attendees, we did have 5 people that did not attend and not pay. We also had a few refunds for attendees who could not complete their attendance so; we issued full or partial refunds. We had 24 vendors that signed up, and all were in attendance. This count was down from the prior year, but one lender had a conflict, one had eliminated their sales team and one was out of communication.

I have attached the working budget sheet that I was utilizing during the planning of the conference. Our budget was based on 300 attendees, and 27 vendors. Each committee had a conservative budget except for program as we wanted to spend our dollars on getting speakers and presenters. The strategy worked well as we closed out the conference with a profit of approximately \$16,957.89. Our contract with the Convention Center required that we spend \$35,000 on food and beverage and we did have to enhance our menu to hit that figure when it was apparent we were not hitting the 300 attendee mark. We did provide a Welcome bag with gift, entertainment for the banquet night, floral arrangements. A ghost tour was planned but the tour guide cancelled on us. One item that I wish we would have hired was a conference photographer.

I can say without hesitation that I had an extremely helpful and knowledgeable conference committee. They took their roles seriously and met the expectation with professionalism, and good humor. We were all on the same page of the kind of conference we wanted to deliver. The members of Region 1 stepped up to volunteer and fill roles as needed. We wish the Region 2 conference committee the best of luck in their efforts, and those future conference chairs who may read this report.

Submitted by: Laura Worley

- o The complete report is available by request from Kerrie Cooper

Discussion points:

- Walkway was difficult to use
- Walk from meeting to vendor area was difficult
- Start planning early, meet often
- Attend program committee meetings
- Be prepared for surprises
- Entertaining this group is difficult

Regional Updates

All regional reports are attached to the end of these minutes

New Business

- **2016-2017 Budget Preview/Discussion – Sue Godreau**
 - o Assumption no change in membership numbers
 - o Estimated dues income based on percentage increase in dues
 - o Little to no profit from Conference since not budgeted that way

- Things to consider
 - Novice Registration from \$600 to \$625
 - Current membership projecting \$84,000 income but may come in short (\$77,800 currently collected)
- Summary – budget looks good; and we don't expect any major changes before the end of the year. The difficulty in balancing the budget is that membership numbers are flat and there is no other income.
- Will consult with investment folks to see if funds from investment account should be factored into budget

Old Business (continued)

- **Conference 2016 – Scott Atkinson**
 - Logo has been reworked
 - Reviewed notes from 2015 conference committee
 - Program will have grad/professional session and possibly a pre-conference workshop
 - One session on governance and ethics
 - Looking for conference photographer
 - Conference giveaways are being researched
 - Program: keynote and motivational speakers include
 - Dr Guadalupe Quintanilla as keynote speaker and session presenter
 - Pam Sherman – motivational speaker for keynote and sessions
 - Standard award letter, prior prior year are other topics
 - Will solicit concurrent session presenters soon
 - New event planners to work with at Turning Stone
 - Entertainment – have main showroom available
 - Transportation – reviewing shuttle times from airport to casino
 - Dates: October 18-20, 2016
 - Theme: All in for Student Success so can include other affiliated groups such as Registrar and Student Accounts at the Conference
 - Program chair: Megan Kennerknecht and Mark Schwarz
 - Facilities Chair: Anne Barton and Vince Scalise
 - Vendor Chair: Laura Helmich
 - Registration Chair: Lisa Papke, Chris Vernam
 - Publicity Chair – Leigh Bove
 - Transportation Chair – Jane Gilliland
 - Technology is part of facilities with Jane Gilliland

Future Meetings

April: April 20, 2016 2:00 – 4:00 pm (Remote)

June: tentative: June 27-28, 2016 noon to noon at Turning Stone. Scott will plan

Legislative Appointments – Kerrie

- Reviewed legislative appointment schedules for Tuesday
- Reviewed talking points with legislature – prior prior year and standard letters

As there was no further business a motion was made by Diane Donohue, seconded by Rob Zasso to adjourn the meeting. The meeting was adjourned at 3:46 pm



ANDREW M. CUOMO
Governor

HESC Update January 2016

2016-17 Application Changes

The 2016-17 TAP application no longer contains prefilled information regarding the parent's or spouse's name and social security numbers as a result of additional security safeguards. This information must be entered directly on the application.

For 2016-2017, applications will now ask for the social security number or the tax ID number (TIN) for parents and spouses.

If a student identifies themselves as a graduate student or graduate veteran for all terms, the system will skip the parental information section of the application and only ask for information related to independent students.

Supporting Documentation

In an effort to provide ease of data collection students and families will now have the capability to upload supporting documentation to HESC. If additional documentation is needed, the student will receive a message and link from HESC to view their account. A page will display the information required along with a button for them to upload the information. Documentation available to upload includes:

- DD214 forms, documentation for those in foster care, orphans, and ward of courts and any third party documentation.
- State or federal tax forms
- Copies of Social security numbers
- Signed signature pages

This new process is for the 2016-17 year processing.

Standardized Financial Aid Award Letter

As you are aware, the NYS Department of Financial Services was charged by the Governor's Office with creating a NYS Standardized Award Letter. The requirements were posted on the Department of Financial Services website on December 30, 2015.

The site now includes a Frequently Asked Question section below the requirements to clarify some questions raised by the Financial Aid community. This section will continue to be updated as questions arise.

The information is located at:

http://www.dfs.ny.gov/consumer/student_protection/shopping_sheet.htm

Schools can send questions to FSLReg@dfs.ny.gov.

Early FAFSA

On September 15, President Obama announced the simplification of the FAFSA application through the use of prior-prior year (PPY) income data. This new process will begin with the 2017-18 academic year. Students will be able to submit their FAFSA applications beginning October 1, 2016 for the 2017-18 award year.

The confirmation page of the FAFSA provides a link for NYS students to apply for TAP. Currently, it is written in statute that the calculation for a TAP award use prior year income. The Tap application will be available for the October 1st application launch. Once a decision is made about what tax year will be used, we will let you know.

Income Verification (IVP)

Students whose income information reported to HESC on their 2015-16 application for TAP that cannot be verified with the New York State Department of Taxation and Finance will receive an email requesting that they review their income information. State Education Law requires all family income be verified before the student will be placed on a roster. Processing of the students TAP application and payment of their TAP award may be delayed until the family income can be verified.

The email provides students with a link to manage their account online as well as instructions about what they need to review. These emails will be sent weekly.

Students should review:

- Social Security Number (SSN) and name for each earner reported match the SSN and name on the tax return filed for that person.
- Tax return type reported for each earner is correct. If no New York State tax return was filed but a federal return was, make sure it is indicated.
- Tax return for each earner was actually filed. If no tax return was filed for an earner, make sure it is indicated.

If all above information is correct and a tax return was filed, tax forms and W2's will be required by HESC to validate the tax information.

Satisfactory Academic Progress for ADA Students

As a reminder, beginning with the 2015-16 academic year, a new paragraph e was added to subdivision 6 of section 665 of the Education Law to establish standards of academic progress for students with disabilities who are TAP eligible and attending

college part-time in accordance with Commissioner's regulations. It also provides that upon each certification, payment eligibility shall be determined and measured proportionally in equivalence with full-time study for students who are disabled as defined by the Americans with Disabilities Act.

That is, institutions will use the number of payment points a student has received to evaluate good academic standing. To clarify, an ADA student attending part-time will have two or more terms before they need to be evaluated at the next level of the SAP chart. NOTE: because an ADA student receives partial payments, round the points down to the nearest number of full payments to evaluate good academic standing.

For more information including examples, refer to ADA Part Time Tap on Tap Coach.

<https://www.hesc.ny.gov/partner-access/financial-aid-professionals/tap-and-scholarship-resources/tap-coach/A.html>

2016-17 College Data Survey is Available on HESCWeb

The 2016-17 College Data Survey is now available on the Web. The survey is used to collect your school's information for the Tuition Assistance Program (TAP), Aid for Part-time Study (APTS) and scholarship processing. Since this data will be used to process your students' 2016-17 state aid, **your school's information must be updated by March 31, 2016.**

Access the College Data Survey

TAP Certifying Officers should click on HESC Transaction Processing (Secure) and log on to Grants and Scholarships. Then click on the College tab and select either View/Update College Data or List College Codes by Federal Code.

TAP Certifying Officer Requirements

TAP Certifying Officers who want to submit data updates via the Web must have Web update authorization. They may request authorization by contacting HESC's Help Desk at 1-888-NYS-HESC (1-888-697-4372).

Only those with Web update authorization will be given access to make changes to the survey pages. Other authorized staff will have the ability to view the data within the pages but will not be able to update information.

Updating Term Information

Term Tuition and Start/End Dates

This information is required for calculating awards and processing payments. It is important that this information be provided accurately by March 31, 2016, as it is crucial to award determinations and payments. Incorrect tuition or dates could affect award calculations and payments to your institution.

- If awards for accelerated summer study are available, report tuition charged for "half-time" attendance.

- **Schools set up on a semester basis must have terms that are at least 15 weeks in duration; Schools set up on a trimester/quarter basis must have terms that are at least 10 weeks in duration.**
 - **Failure to meet these requirements may affect a school's eligibility for NYS financial aid. Questions regarding term length should be directed to the New York State Education Department's Office of College and University Evaluation at (518) 474-2593.**

Mandatory Fees, Room & Board Allowance and Cost of Attendance

This information is used to calculate or estimate scholarship awards that are not based upon tuition. Enter the appropriate information as follows:

- **Mandatory Fees** - Average fees charged to all students.
- **Room and Board Allowance** - Average cost of room and board charged by the college for a typical student. (If no student housing, leave blank.)
- **Cost of Attendance** - Use Title IV cost of attendance.
- **Term Add/Drop Dates** - This is required for the APTS Program. As with term start dates, the accuracy of this data is crucial to APTS processing.

Registered Business Schools

The total program tuition at registered business schools must be prorated by term. For example, if the total program tuition is \$6,000 and it takes four terms to complete the program, the term tuition is \$1,500 (\$6,000 divided by four).

Registered business schools must submit a copy of their enrollment agreements for all TAP-eligible programs and a document listing all start and end dates for terms with multiple start dates.

The enrollment agreements must indicate the term length or term structure. Total program tuition and term tuition should also be stated on the enrollment agreements.

College Survey Deadline and Post Deadline Updates

The College Information and Term Information must be submitted via the Web by March 31, 2016. If changes to College Information are necessary after March 31, 2016, TAP Certifying Officers should send a detailed email to HESC at Collegeupdates@hesc.ny.gov. This address may also be used for questions concerning the Payment Survey process.

Update Your School's Contact Information

Contact person information may be updated by TAP Certifying Officers throughout the year when staff changes occur; except for CEO or college president data. HESC strongly encourages TAP Certifying Officers to review their school's contact information, and submit changes - especially email addresses - for all staff. This information is particularly important for APTS Coordinators as HESC will be sending automatic notifications of processing deadlines to the email address listed for them.

Send your request for changes to CEO or president data to at Collegeupdates@hesc.ny.gov.

Separated Electronic Roster Files

HESC is able to create separate electronic roster files (HE8069) for TAP Rosters, STEM Rosters, and for the New York State Achievement and Investment for Merit Scholarship (NY-AIMS). Currently, most schools receive one electronic roster file containing student records appearing on both TAP and STEM rosters. NY-AIMS rosters will be included on this single electronic file unless you opt to receive separate files.

If schools wish to receive separate files for ease of processing at their schools, you must opt in by contacting HESC at payments@hesc.ny.gov

New York State 'Get on Your Feet' Loan Forgiveness Program (GOYF)

HESC is pleased to announce that The Get on Your Feet Loan Forgiveness Program Application is now available. GOYF is a new program that was established for the purpose of alleviating student loan debt for NYS college residents.

To be eligible for an award the applicant must:

- Be a legal resident of NYS for at least 12 consecutive months before applying
- Be a US Citizen or eligible non-citizen
- Graduated from a NY high school or received a NYS equivalency diploma
- Received an undergraduate degree from a NYS college or university in or after December 2014
- Be Enrolled in a Federal Income based (IBR) repayment plan or Pay as you earn plan that uses 10% discretionary income
- Adjusted gross income from last available tax year must be less than \$50,000
- If employed, the applicant must work in NYS
- Be not more than 30 days past due or in default of a federal student loan
- Must be in compliance with any terms of any service condition imposed by a NYS award
- Must apply for the GOYF program within two years of receiving undergraduate degree, either a bachelor's or associate's degree

Students who have graduated with a graduate or professional degree are not eligible for the GOYF program. However, an undergraduate recipient can subsequently enroll in a graduate or post-graduate program and continue to be eligible to receive their payments when they are again in active repayment.

The awards will equal the amount of the recipient's current monthly payment under the income-based repayment plan. Payment will be made for up to 24 months and will be paid directly to the borrower's Loan Servicers. Yearly recertification will be required to ensure the recipient continues to meet the eligibility requirements of the program.

New York State Achievement and Investment in Merit Scholarship (NY-AIMS)

The NY- AIMS program is a merit-based scholarship for NYS high school graduates who have achieved academic excellence. There will be up to 5,000 awards granted each year for the 2015-16 and 2016-17 academic years.

For 2015-16, 3,500 students completed the web application but only 1,800 students provided all required documentation. Awards were given to the 1,800 students who met the eligibility requirements and provided all the necessary information.

To be eligible, applicants must:

- Be legal residents of NYS for at least one year
- Be U.S. citizens or eligible non-citizens
- Have graduated from NYS high school in 2016-17 (Equivalency diploma not an option)
- Be enrolled in an approved undergraduate program of study beginning in fall 2016-17
- Have achieved at least two of the following during high school:
 - have graduated with a grade point average (GPA) of 3.3 or above;
 - have graduated "with honors" on a New York State Regents diploma or received a score of 3 or higher on two or more Advanced Placement (or AP) examinations;
 - have graduated within the top 15% of his or her high school class.

Recipients will apply only once but must complete the FAFSA and TAP application annually. Schools will need to certify that a NY-AIMS recipient is in attendance at the school and is meeting good academic standing requirements using the same requirements as for the TAP program.

The deadline for the 2015 NY-AIMS has passed. The 2016-17 applications will be available in May 2016.

Please contact the Scholarship Unit at 1-888-697-4372 with questions about this scholarship.

NYS Masters in Education Teacher Incentive Scholarship Program

The Masters in Education Teacher Incentive Scholarship was established to encourage exceptional New Yorkers to pursue teaching as a profession.

Each year, 500 awards will be given to cover SUNY or CUNY graduate tuition for those pursuing a Master's in Education. at a SUNY or CUNY college or university.

Some of the eligibility requirements are:

- Recipients must agree to teach in New York State for five years after receiving teacher certification
- Recipient will be asked to sign a service contract agreeing to the requirements of the program.

This program will not be available until the 2016-17 academic year. More details will follow as the program requirements are finalized.

TAP 2014-15 Academic Year Closeout

HESC is closing out TAP certifications for the 2014-15 academic year which ended June 30, 2015.

All student certification transactions for 2014-15 TAP payment rosters 001- 021 must be submitted before March 25, 2016. Transactions left pending after this date will be decertified by HESC.

To review pending student certifications transactions for 2014-15 academic year go to Transaction Processing select Grants & Scholarships, enter ID and password, then choose View/Submit Pending Certifications.

Region 1 Report

NYSFAAA Exec Council Meeting

February 1, 2016

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: December 10, 2015 at Salvatore's Restaurant – Holiday Christmas Luncheon

Attendees = 32

Topics and Training details: Upcoming NYSFAAA webinar on 2/26/16, Conference 2015, College Goal New York.

2 Other Training events that Region was involved in: Example – CGNY, Guidance Counselor workshop?

NYSFAAA Webinar on the Top 20 Most Frequently Asked Verification Questions and Everything You Needed to Know about Modules but Were Afraid to Ask which was held on November 20, 2015 at Canisius College. We had 20 attendees.

3 Treasury update: Balance as of 12/10/15 is \$6952.87.

4 Committee Reports:

Conference 2015 – Laura Worley

We had 252 attendees. The Conference Evaluations are being reviewed. She is working on the final report to be submitted to Executive Council. Thanked all of the Committee Chairs for all of their hard work. A thank you gift was sent to Melissa from the Convention Center; which did a fabulous job accommodating our needs prior to and during the conference.

5 Conference news (If your region is involved in Conference planning) none

6 Upcoming meetings and events

- **Next Regional Meeting will be held on February 26, 2016 after the NYSFAAA Webinar at Hilbert College.**
- **NYSFAAA Webinar to be held on February 26, 2016 at Hilbert College. Topic of webinar is Jim Briggs, the Tax Detective.**
- **College Goal New York to be held on February 25, 2016 at Niagara Falls High School**
- **Future meeting dates are March 24th, location TBD, a joint meeting with Region 2 in April, May 19th at Medaille and summer outing TBD.**

7 Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council) None

Region 2 Report

NYSFAAA Exec Council Meeting

Date February 1-2, 2016

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: November 20, 2015 at Roberts Wesleyan College

Attendees –31 attendees

Topics and Training details: The training portion of this meeting was the SWT on the Top 20 Verification Frequently Asked Questions and Everything you need to know about Modules. We also had a regional meeting following the training and lunch. Margaret Christian, Region 2 Exec Council rep, provided a report from the October council meeting in Buffalo, NY. Margaret also provided a Membership report in Deidre Strutz's absence. Region 2 currently has 114 members and 32 who have not renewed. Statewide membership for 14-15 was 1319, currently we have 1053 and our goal for 15-16 is 1325. November 15th was the cut-off for renewal. If members have not renewed they will no longer receive emails via the listserv. Membership fees were increased by \$10. Going forward, one of the goals for membership is to develop a plan to engage more members and communicate with members more frequently. Jane Gilliland also reported feedback on the Intermediate Workshop that was held in Albany. The next regional meeting will be held on December 15, 2015. Lunch will be served. To help defray the cost members will be charged \$10 per person. The region will cover the difference.

Date and Location: December 15, 2015 at Finger Lakes Community College

Attendees –21 attendees

Topics and Training details: Margaret Christian provided a report from the remote Exec Council meeting that was held on December 9, 2015. The TICC Committee is looking for volunteers, any and all are welcome! The survey results from the Buffalo Conference were not available yet. 252 members attended the State-wide Conference. Region 6 will be hosting the 2017 Conference. The Marriott Westchester is the location that will most likely be selected. Lisa Simpson provided the HESC update via phone. Some of the main points she presented: PPY, Standardized Award Letter, TAP changes for 16-17 and updates on Get on your Feet program and STEM and AIMS. We did not have a formal training at our holiday meeting/lunch but we had an informal discussion regarding sessions at the FSA Conference that were held in Las Vegas. Members talked about sessions they attended and the highlights from those sessions. The members that were present also discussed the latest information regarding the Perkins loan program. The next meeting will be the Jim Briggs SWT to be held February 26, 2016 at Nazareth College. A regional meeting will follow the training.

2 Other Training events that Region was involved in : Example – CGNY,Guidance Counselor workshop?

College nights were held at Marketplace Mall on 09/23/2015 and Greece Ridge Mall on 09/24/2015. Both nights were well attended. The High School Guidance Workshop was held at Nazareth College on November 6, 2015 and was a success. 93 counselors attended. Schools were asked to donate folders and prize giveaways such as pens, shirts or coffee mugs. College Goal Sunday is to be held on Sunday, January 31, 2016 at East High School. Approximately 150 families are expected to attend. Toni Greenlee is asking for volunteers. More information will be going out via the listserv. In addition to College Goal Sunday, volunteers are needed to staff FAFSA Fest. This is similar to College Goal Sunday but on a smaller scale. It serves about 10-15 students at each event and is held during February and March. Rochester College Access Network (RCAN) is also looking for 2 volunteers to serve on the Steering Committee. Please contact Toni if interested.

3 Treasury update: The current balance as of December 15, 2015 is \$2228.86.

4 Committee Reports-n/a

5 Conference news (If your region is involved in Conference planning)

Region 2 will be hosting the 2016 Conference at Turning Stone Resort and Casino on October 18-20, 2016. Scott Atkinson and BJ Revill are the co-chairs for the Conference. The theme is "All in for Student Success." BJ is looking into having a grad/professional symposium prior to the start of the conference rather than offering grad/professional sessions during concurrent sessions. That way members who work with undergrads as well as grads would not be forced to choose. Possible key note speakers were discussed as well reaching out to all members for sessions topics.

6 Upcoming meetings and events

December 15, 2015-at Finger Lakes Community College
February 26, 2016-SWT and meeting at Nazareth College
March 11, 2016-at RIT
April 15, 2016-at Alfred State
May (TBD)-combo meeting with Region 1???

7 Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)

Region 3 Report

NYSFAAA Exec Council Meeting

February 1, 2016

Meetings Since Last Exec Council Meeting

Date and Location: November 20, 2015 at LeMoyne College
Attendees = 22
Topics and Training details: State wide training
HESC update
Recognized Region 3 Rising Star and Service Award recipients, Kevin Shults and Tami Gilbeaux, respectively.

Date and Location: December 11, 2015 at the Craftsman Inn
Attendees = 23
Topics and Training details: HESC Update
Executive Council meeting review
FSA Conference – group discussion
Holiday luncheon

Other Regional Training Events

None

Treasury update:

November – Current balance \$
December – Current balance \$5696.93

Committee Reports

Development Committee

Tami Gilbeaux has submitted several letters of intent to agencies who support causes similar to NYSFAAA's. She is looking for more volunteers to join the committee.

High School Outreach

CGNY website is up and running. Region 3 has 9 CGNY events. Statewide we have over 39 events. We have over \$24,000 that must be used up this year.

Support staff workshop

Kevin Shults and Amy Connors are working on the next support staff workshop. They are reaching out to the Craftsman Inn for quotes. They are seeking ideas for topics from schools and are hoping to increase workshop attendance.

Conference news (If your region is involved in Conference planning)

None

Upcoming meetings and events

Future meetings are:

February 4, 2016	LeMoyne College for Statewide Training with Jim Briggs
March 18, 2016	TC3
May 16, 2016	Auburn area

Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)

None

Region IV Report

NYSFAAA Exec Council Meeting

February 1, 2016

1. **Meetings:** November 20, 2015 at Excelsior College. We viewed the statewide training together and then had a regional meeting. The regional meeting included a HESC update by Lisa Simpson, a discussion of prior-year, a Perkins discussion and legislative update by Maria Livolsi and a discussion of future meetings.
- 2 **Other Training events that Region was involved in:** College Goal Sundays participation
- 3 **Treasury update:** \$9114.30 current account balance.
- 4 **Committee Reports:** Membership: 121 Associate, Affiliate, Retired and Life Member; 88 active.
- 5 **Conference news:** None
- 6 **Upcoming meetings and events:**
 - a. February 26, 2016 statewide training at Excelsior College featuring Jim Briggs. Following lunch we will also have a region 4 meeting.
 - b. April 2016- We are planning a regional meeting (exact date and location TBD) which will feature a panel of schools who have recently been through an audit. The panel will include information on both federal and NYS audit issues.
- 7 **Regional comments/Recommendations:**
 - a. Strategic Long Range Plan goals:
 - i. **ADVOCACY:** We would like to increase advocacy efforts of Region IV members due to our location. Over the next year we would like to continue to incorporate guests from state legislature, SED, OSC and HESC into our meetings in order to strengthen our relationships with those agencies.
 - ii. **LEADERSHIP and DEVELOPMENT:** Over the next year we will encourage other members to attend Executive Council meetings so that they can have an opportunity to learn more about NYSFAAA. This will provide a targeted mentoring opportunity for those who may be interested in becoming future leaders within NYSFAAA.

Region 5 Report
NYSFAAA Exec Council Meeting
February 1, 2016

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: November 20, 2015, Berkeley College

January 21, 2016, The Culinary Institute of America

Attendees = 19 at Nov 20 meeting and 32 at Jan 21 meeting

Topics and Training details:

November meeting – Statewide training event followed by regional meeting to discuss CGNY, future meetings, encourage regional reps for NYSFAAA, and Exec Council and Treasurer’s reports

January meeting – Guest speaker, Lisa Simpson, gave a very informative HESC Update and answered numerous questions regarding standardized award letters and other current hot topics. Discussed CGNY, promoted state-wide training event Feb 26, asked for advice regarding future meeting topics, and Exec Council and Treasurer’s reports. Following the meeting we had a delicious lunch at the Ristorante Caterina de’ Medici.

2 Other Training events that Region was involved in :

CGNY events held in Region V included locations in Poughkeepsie, Yonkers, and New Rochelle (I may be leaving some out)

3 Treasury update:

As of January 20, 2016, Region V has a balance of \$11,543.07 although Perry Brown had payments due to the Culinary for the luncheon on the date of our meeting.

4 Committee Reports n/a

5 Conference news (If your region is involved in Conference planning) n/a

6 Upcoming meetings and events

Our next Region V meeting will be held directly after the statewide training event on Feb 26 at Berkeley College. In addition we are planning to hold a meeting in late March/early April to possibly discuss ‘best practices’. Joanne Sullivan plans to send out a Survey Monkey to get ideas of meeting topics from region members.

7 Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)

Concerns regarding the Standardized Award Letter – very concerned about reporting the average loan indebtedness figures for grad programs, how to determine 4-yr costs for privates and why this is difficult to predict, question whether school can customize this document.

Region 6 Report

NYSFAAA Exec Council Meeting

February 8, 2016

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

- a. **Date and Location: November 20, 2015, Mercy College, NYC**

Attendees=50

Topics and Training details:

Statewide training meeting, Twenty Common Questions about Verification

- b. **Date and Location: January 15, 2016, Frames Bowling**

Attendees = 22

Topics and Training details:

Zachary Goodwin from the DOE provided a federal update; which included the changes in the Perkins program, verification policy changes, and future cash management changes. There was plenty of time for Q &A. A discussion on creating a Mentoring program and guidelines were discussed with those interested in participating.

2 Other Training events that Region was involved in :

Example – CGNY, Guidance Counselor workshops.

There were 2 High School Counselor Workshops in December.

December 3, 2015- St. John's University-NYC

December 11, 2015-FIT

Several High Schools Financial Aid Nights

Approximately 4 CGNY have taken place in Region 6.

- 3 Treasury update: Lucy Villaquiran provided our Treasury Update. Currently we have \$8412.04 in our regional account.**

4 Committee Reports:

Membership:

- Currently we have 405 paid members for 2015-16. This is down from last year. We suspect many affiliate members have not renewed.
- Affordability
- Interest

5 Conference news (If your region is involved in Conference planning)

Region 6 has put in a request to host the 2017 NYSFAAA Conference. The Westchester Marriott is the considered site. This information was shared at the December Executive Meeting. The Council had additional questions they needed clarification on before voting. A final vote will be taken at the February meeting.

6 Upcoming meetings and events

- February 26, 2016-Statewide Training & Regional Meeting-Fordham Law School.
- April 2016 & June 2016 location and agenda TBD

7 Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)

- Feedback from a few members on not wanting to go out of the office for web meetings. Members expressed webinars are “taking over” the organization
- Affordability. Many schools can’t afford to pay for all staff members to become members of NYSFAAA. Institutional membership or shared membership is recommended. Find it unfair to limit the professional training/development.

Region 7 Report

NYSFAAA Executive Council Meeting

February 1, 2016

Submitted by Amy Thompson St. Joseph's College

1. Meetings Since Last Exec Council Meeting

- a. November 20, 2015 State Wide Training at Molloy College
 - i. 30 attendees
 - ii. Topic: Verification presented by Zachary Goodwin
- b. December 11, 2015 Holiday Meeting at The Milleridge Inn
 - i. 22 attendees
 - ii. Topics: Kerrie Cooper presented NYSFAAA updates and Scott Buchanan (courtesy of Sallie Mae) presented a federal government relations update

2. Other Training Events That Region Was Involved In

- a. Guidance Counselor Workshop November 6, 2015 at SUNY Farmingdale
- b. CGNY January 12, 2016 at Paul Schreiber H.S in Port Washington and January 27, 2016 at Elmont H.S. in Elmont

3. Treasury Update

- a. \$3,041.98 balance as of January 20, 2016 per our Treasurer, Jeanine Murphy

4. Committee Reports

- a. N/A

5. Conference News (If your region is involved in Conference planning)

- a. N/A

6. Upcoming Meetings and Events

- a. February 5, 2016: Region 7 meeting at Nassau Community College
- b. February 11, 2016: CGNY event at Wyandanch Memorial H.S. in Wyandanch
- c. February 26, 2016: State Wide Training at NYIT Old Westbury
- d. February 27, 2016: CGNY event at Brentwood H.S. in Brentwood
- e. March 4, 2016: Region 7 meeting at SUNY Farmingdale

7. Regional Comments/Recommendations

- a. N/A

Region 8 Report

NYSFAAA Exec Council Meeting

February 1, 2016

1. Meetings Held Since Last Executive Council

11/20/15 NYSFAAA Statewide Training and Region VIII Meeting

Location: SUNY Potsdam

Attendees: 20 to 25

Topics and Training: "Top 20 Most Frequently Asked Verification Questions" & "Everything You Need to Know About Modules But Are Afraid To Ask"

2. Other Training:

Two School Counselor Workshops were held in November. Stacey Hawkins from Clarkson and Kathy Parker from Canton were Co-Chairs. The first occurred on 11/9/2015 at Clarkson University and there were 31 counselors in attendance. The second occurred on 11/10/2015 at SUNY Plattsburgh and there were 20 counselors in attendance.

Over the winter months, high school nights were conducted at least 37 different high schools across the North Country. At least 1,002 students and families were in attendance at these various locations. Presenters included staff from SUNY Plattsburgh, SUNY Canton, SUNY Potsdam, St. Lawrence, and Clarkson.

College Goal Sunday is scheduled to be held on 1/31/2016 at Clarkson. Stacey Hawkins is the site coordinator. The number in attendance is not available yet.

3. **Treasury Update:** \$3,657.49 as of 1/27/2016.

4. **Committee Reports:** Nothing to report.

5. **Conference News:** Nothing to report.

6. Upcoming Meetings and Events:

2/20/16 SUNY Financial Aid Day

Location: SUNY Canton

Attendees: TBD

Topics and Training: FAFSA on the Web

2/26/16 NYSFAAA Statewide Training and Region VIII Meeting

Location: SUNY Canton

Attendees: TBD but 14 registrations so far

Topics and Training: Networking with muffins and coffee, NYSFAAA update from Kerrie, Jim Briggs - The Tax Detective, Lunch, & then a Region Meeting

7. Regional comments/Recommendations :