



**NYSFAAA Executive Council**  
**June 19-20, 2017**  
**Westchester Marriott, Tarrytown**

**Call to Order & Roll Call**

President – Darrin Rooker  
Past President – Kerrie Cooper remote  
1<sup>st</sup> VP – Adrienne King  
2<sup>nd</sup> VP – Howard Leslie  
Secretary – Kelly Kelly-excused  
Treasurer – Robert Zasso  
Past Treasurer – Kerry Lubold  
Region 1 – Kathy Michalski  
Region 2 – Margaret Christian  
Region 3 – LaSonya Griggs  
Region 4 – Michelle Fontaine-remote  
Region 5 – Diane Donohue  
Region 6 – Melanie Williams-Bethea  
Region 7 – Amy Thompson  
Region 8 – Todd Moravec

Guests: Kathy Flaherty – filling in as Secretary for Kelly Kelly  
Susan Godreau – Budget Committee Chair (remote)  
Heather Ander – TICC Co-Chair (remote)  
Lea Nuwer – TICC Co –Chair (remote)

**Discussion via Email**

**May 2017**

**MOTION:** A motion was made by Amy Thompson, seconded by Kerrie Cooper to allow the 2017 Novice Training an alcohol policy exemption. There was no discussion. The motion passed with 11 in favor, no oppositions, and 4 abstentions.

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Darrin Rooker called the meeting to order at 12:34 pm with a quorum of Executive Council present.

**Approval of April 17, 2017 Minutes**

**Motion:** A motion was made by Sonya Griggs, seconded by Howard Leslie to accept the minutes. Darrin made a motion to amend the minutes with a correction to the spelling of Samantha Veeder’s name on the next to last page. Adrienne King seconded that motion. The motion was passed to accept the minutes as amended with all in favor, no oppositions, and no abstentions

## President's Report – Darrin Rooker

- HESC Board Meeting
  - HESC Board was tasked to pass Excelsior regulations which were not received until 9:30 pm the evening before the meeting, leaving no time to send information to Executive Council for reaction. Mark Cohen (student government president for SUNY) was concerned with late delivery of materials to allow for reactions. Darrin had a prepared statement (statement attached to these minutes) as a consulting, nonvoting member.
    - Comments
      - NYSFAAA Statewide Training committee offered to train on Excelsior and the Enhanced Tuition Assistance programs. HESC staff initially accepted this offer, then rescinded.
      - Region 5 was prepared to have regional event with this training, but the late announcement on the HESC webinar affected their ability to have a good regional collaborative session. Could have been a better format.
      - Darrin will continue to encourage HESC to have further training and to offer NYSFAAA's assistance with this.
  - NYSOBA President was at this meeting. They were interested in partnering with NYSFAAA for training. The new President (Nancy Ducci) is from University of Rochester Medical School and hopefully the collaborative spirit will continue. Howard Leslie stated this has been done before and he will contact the new President.
- EASFAA Report
  - Darrin attended the EASFAA Conference
  - Jeff Baker gave the Federal Update
    - talked about a Dear Colleague Letter coming out: working with students and updating tax information;
    - New York has reduced the average default rate from 8.2% to 8%;
    - students must be at least half-time to be eligible for summer Pell;
    - Perkins is officially ending this year. There is some pending legislation to extend, but nothing official.
    - Jeff is retiring in July and was asked who would succeed him as Director of Policy or would it be left open? At that time he thought it would be filled, but since that time his likely successor has left the Department of Education. Jeff was given a standing ovation. He said he got into financial aid because he "just wanted to help a few poor kids go to school".
  - EASFAA Council Meeting was held in Portland, ME Kristi Jovell is the new President. Attended NASFAA leadership conference and found it very helpful. Her goal is to enhance EASFAA training, especially in the webinar format. Plans to communicate on training topics monthly and with the EASFAA Council weekly. EASFAA presented their survey results regarding expectations from the membership. They plan to increase membership from 500 to 700. Had planned to offer NASFAA credentials via webinar but NASFAA will no longer allow this. They plan to offer NASFAA training in each State in person
    - NYSFAAA Executive Council reaction included:

- Does this overlap with Novice training
- It is being offered on Day 1 of conference 2017 (verification topic)
- Very thorough training
- We can support as long as it doesn't interfere with our conference or Novice
- The 2018 EASFAA conference is at the Sagamore and may include pre-conference NASFAA training
- Are trainers available? NASFAA is willing to train credentialed individuals. There will be a training calendar. There may be several training sessions held around the State
- What would be the cost to NYSFAAA members?
- EASFAA bought the full package from NASFAA
- NYSFAAA bought only one module for the conference.
- 2018 conference is at the Sagamore; Kerrie Cooper is co-chair. They are being assisted by conference planner, Don Taylor to help with the contract negotiations. The remaining conference planning will be handled by EASFAA.
- Maryland does information program through local PBS channel.
- NASFAA Thought Force update: looking at shared services (legal, accounting, training, audits etc). There will be a session at the upcoming NASFAA conference. Kristi is looking at shared services from an EASFAA perspective. Darrin thinks that regions should have a stronger voice in NASFAA if/when services are shared. The at-large votes may outnumber the regional votes when these decisions are made. Larry Chambers is EASFAA representative on this Task Force.
- NYSFAAA meetings held and working projects were reported to EASFAA:
  - Increased number of FAFSA workshops are requested
  - Preliminary review of website redesign is underway
  - Letter of Support for Perkins Loan program
  - TAP white paper
  - Position statement on Excelsior and Enhanced Tuition Award
  - Renamed the NYSFAAA scholarship program the George Chin Memorial Scholarship
  - Election results
  - Training topics
  - Dates for 2017 and 2018 State Conferences
- EASFAA treasury report included credit card information. Organization credit cards are tied to people's personal credit reports. So, if treasurer does not make timely payment, could this affect a person's credit?
- Novice Workshop
  - Attended first day; well run under Lisa Simpson. Facilities, food and staff all went well.
  - 86 were registered.
- Mentorship Committee
  - Now co-chaired by Nancy Teodecki and Amy Connors

- Election Committee – results: LaSonya Griggs is President-Elect and Susan Godreau is Treasurer-Elect. Notify Kerrie Cooper, by e-mail, of new regional Executive Council representatives. Regions 2, 4 and 7 have reported so far.

MOTION: A motion was made by Kerrie Cooper, seconded by Rob Zasso to destroy the ballots from the 2017 elections. There was no discussion. The motion was passed with all in favor, no oppositions and no abstentions.

- Long Range Plan Evaluation – time line is a little delayed. New time line is to have evaluation by August remote meeting to produce 1718 goals and objectives and before Conference 2017. This will allow time to send the information to the membership for discussion at Conference 2017.
- Update of Long-Range Plan: should create membership survey. Have questions from recent EASFAA survey. Working on logistics of the actual survey. Committee will meet and ask TICC for help.

#### **First Vice-President's Report – Adrienne King**

- Two new co-chairs for mentoring: Nancy Teodecki and Amy Connors- reaching out to new members and considering a Conference gift
- On June 12, 2017 1226 email reminders were sent for 1718 membership renewal; 145 memberships were renewed as of June 18, 2017
- 1516 is closing with 1353 members for that year and \$83,805 dues collected
- 1617 has 1249 members and \$79,010 in dues collected
- Request for membership from Institute for Culinary Education (ICE) located in New York City. Vocational, clock-hour school (Pell, SEOG and direct loans). Administering Title IV aid since 2010.

MOTION: A motion was made by Kerry Lubold, seconded by Todd Moravec to accept the Institute for Culinary Education for NYSFAAA membership. There was no discussion. The motion passed with all in favor, no oppositions and no abstentions.

#### **Second Vice-President's Report – Howard Leslie**

##### **Statewide Training Committee Report**

**Tarrytown Marriott June 19-20**

**Respectfully submitted Kristina Delbridge/Howard Leslie CO-CHAIRS**

Other Committee Members:

- Jannatul Ferdous-Hypolite, Assistant Director, Systems Coordinator Office of Financial Aid Teachers College, Columbia University
- Perry Brown, Financial Assistance Counselor, The College of Westchester
- Calvin (Brian) Ghanoo, Director of Compliance, Fordham University
- Brian Smith, Assistant Director of Financial Aid, SUNY Cobleskill
- Angela VanDekker, Associate Vice President Student Financial Services, Fordham University
- Wendy Rizzo, Assistant Director, Student Financial Services, Ithaca College

This year, after our June 15<sup>th</sup> webinar, we will have provided 13 events and assisted with one regional meeting. As of the writing of this report, please see detail below, we trained at least 7,070 duplicated people this academic year.

#### Challenges:

The primary challenge this past year has been the department of education transition and getting our last training off the ground. As you all know by now we had to change the topic matter after having already postponed the webinar for 3 months. The good news is that the new topic is very relevant. The bad news is how this is possibly going to play out in the near and far future.

Other challenges were that both Howard and Kristina had their hands full with medical and/or personal issues. We think we came through for each other just fine.

As you also know by now, Kristina will be leaving us at the end of this academic year. The search for a new co-chair must begin immediately. For the first several years Howard did this totally on his own. He can manage most of it but he needs support, at least on some of the backend. That is not to make light of the tremendous efforts and contributions that Kristina has made all these years. She will be missed by the committee, the membership and MOSTLY by Howard.

As for Howard, his 2<sup>nd</sup> Vice Presidency will end a year from October. His plans are to continue leading SWT, of course at the pleasure of the president, until retirement. However, that might be coming in as few as two years. Howard is going to be 63 in September (celebrating 40 years in FA in October) and might at least quasi retire at 65. A succession plan might be in order.

A study of the numbers below.

Once again, we believe we did very well reaching a large audience proving excellent training. We were a little disappointed in seeing how few people take advantage of the recordings and we suggest that they somehow be better highlighted on the website and possibly advertised. We think it is an excellent benefit not being taken advantage of. On the other hand, many people DID take advantage of some of the handouts. Some of those numbers are big.

#### HAND OUTS

Federal Taxes Verification (R Weirnerman)	4,292
Reference Manual (R Weirnerman)	3,961
Transcript decoder (R Weirnerman)	2,293
Early FAFSA	1,438
Verification (JoEllen Soucier)	923
Reference Manual 2 (R Weirnerman)	923

#### WEBINARS

Higher Ed Update 9/23	109 + 0 = 109
Early FAFSA 9/30	2,848 + 518 = 3,366
Borrower Defense 10/14	236 + 89 = 325
Verification 10/26	550 + 162 = 712
Verification 11/11	574 + 112 = 686

Verification 11/8	477 + 119 = 596
SWT – Regional Meeting	198 + 0 = 198
New Audit Guide 1/27	87 + 0 = 87
SWT – Regional Meeting	177 + 87 = 264
Tax Detective 2/17	409 + 74 = 483
Advanced GE 3/6	138 + 0 = 138
UEH 4/14	106 + 0 = 106
Verifying Verification 06/15)	TBA

TO DATE (As of 6/3/17)  
TOTAL LIVE PARTICIPANTS = 5909  
TOTAL HITS ON THE WEBSITE (Assuming only one view per a hit – very conservative) = 1,161  
TOTAL = 7,070

Looking for dates and topics for 2 remote meetings next year: to be discussed at August meeting.  
Intermediate Training is due this year; will contact Jane Gilliland.

#### Secretary’s Report – Kelly Kelly

- 2017 Conference – Update by Melanie (on Tuesday June 20<sup>th</sup>)
- School Outreach & Early Awareness – Update by LaSonya
  - Closed out 2016-2017
  - 2017-2018 is done
  - Getting requests for 2018-2019 and sites are anxious to get on our calendars. Several of site coordinators getting calls, not knowing if enough volunteers will be available yet.
  - No Statewide funding this year so Workshop Coordinators should go to regions for funding. For example, Region 3 paid postage for mailing
  - Looking for new state-wide chair as Sonya becomes President-Elect. Downstate workshops should contact Gene Rogers.
- Request by Kelly Kelly to allow her to post the Executive Council meeting minutes as “unofficial” on the website after a meeting-will then post the “official” minutes once approved at the next council meeting.

MOTION: A motion was made by Rob Zasso, seconded by Kathy Michalski to post the draft minutes within 3 weeks of Executive Council meeting. President will submit the minutes to Executive Council for approval and Secretary will post the official minutes to the website. The motion was passed with all in favor, no oppositions and no abstentions.

#### Treasurer’s Report – Robert Zasso

- 2017-2018 budget was reviewed for approval
- Budget sheets sent by Rob
- Looking for advice from Robert Bell on scholarship scenarios
- ATAC now charges a \$400 service fee
- Rob will look into PayPal and that would be a region’s responsibility
- Budget review: comments

- Membership will remain the same (1300); assume same budget for Novice
- Review of line-by-line expenses
- Added budget line for Intermediate Workshop
- Possible additional award with plaque
- Adjustments to requests: what is the philosophy for paying for college application workshops which are not funded by CACG but rather by regions? It was suggested that vendors sponsor these events. Maybe charge \$250/vendor for events. NYSFAAA should consider a statewide policy to help all regions equally to do the training. Should we consider a webinar format? Perk is that it would boost affiliate membership as they would use on-line signup. Sonya will check with Lisa Simpson about webinar format for Excelsior training.

MOTION: A Motion was made by Todd Moravec, seconded by Amy Thompson to approve the 2017-2018 NYSFAAA budget as revised. There was no further discussion. A vote was taken with all in favor, no oppositions and no abstentions.

- Regional Reports
  - Region 1
  - Region 2
  - Region 3
  - Region 4
  - Region 5

Day 1 adjourned at 4:56 pm

Day 2 called to order at 8:38 am

Remote Attendance: Lisa Simpson, Kerrie Cooper

Remote Guests: Tami Gilbeaux, Heather Adner, Lea Nuwer

<b>HESC Update – Lisa Simpson</b>
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- Excelsior opened applications on June 7, 2017; thousands were received the first day
  - Added language to weed out ineligible, but applicants did not understand the tax question so it was removed
  - Looking at how to validate first year vs continuing student
  - Academic credit files are being sent out to schools and need a response
  - Student status listing will be out in June/July, for Excelsior only, without dollar value and may be looking at credits from schools; will include students who passed all edit checks Probably will be trigger to defer tuition
  - Some schools have not tested yet with them and working with SICAS for programming
  - Q&A available on Excelsior and Enhanced Tuition; Lisa has a more detailed Q&A she can send, if needed
  - 2 call centers are answering phones and chat has been set up
  - Fact Sheet on website

- Comment/question: Campuses can opt to increase tuition for 17/18 students who are not Excelsior students
  - Those students who may have mis-reported their year and were given Excelsior letter and subsequently are not eligible will get new notice from HESC
  - For student who get a fall-only private/school scholarship, making them ineligible for Excelsior in the fall, but would get Excelsior in the spring (no scholarship); what tuition rate would be charged? Answer: the rate would be the same for the year. Decertify for fall Excelsior, charge 16/17 tuition rate since they are eligible in the spring for Excelsior.
- Enhanced Tuition Award
  - Private/not for profit schools
  - Schools can opt in/out; agreement was due 6/19/17
  - Schools will be added to drop down box when application is live
  - Award is \$6000 less TAP: balance is equal match from school and Enhanced Tuition Award
  - Upper class have funding priority over freshmen
- SUNY/CUNY Part time program, community college program, part-time scholarship program are not restricted to tuition alone.
  - \$1500/semester for up to 2 years
  - Can get with APTS and part-time TAP
- New York Child Welfare Worker Scholarship
  - Must already be working at this type of agency in New York
  - Must work for 5 years
  - Must have been working in the field for at least 2 years
- Loan Forgiveness for Child Welfare Workers
  - Available in October
- TAP
  - Working with TAP errors identified through Excelsior application process
- Novice Training
  - 85 participants; good location
  - Offered jump drive, google doc or manual for training. Rethinking this since printed 13 extra copies once folks got there. Further discussion in fall meeting about this. Will work on enhancing/indexing google doc for next year.
  - Suggestion to go out for a site bid for a few more years, maybe different part of state. One criteria is proximity to major transportation, easy accessibility. Comment: networking is important so should not change what training does to please participants.

<b>Old Business</b>
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- Conference 2017- Melanie Williams-Bethea
  - Program Committee (draft conference program attached to minutes) includes Toya from LIM, Lisa Simpson, Lucy Villaquiran, Dan Robinson, Howard Leslie and Clair Jacobi
    - Keynote: Dr Steve Perry



- Emphasis on establishing mentor/mentee relationships and opportunities
- Samantha Veeder, President Elect of EASF AA will deliver EASF AA remarks
- Direct facilities questions to Melanie; program questions to Howard or Lucy

9:58 Executive Council went into Executive Session

10:06 Executive Council resumed the meeting

- Website update – Heather Adner and Lea Nuwer
  - Review new website
    - Recommendation to have header for Training at the bottom to replace Members or combine news/events to make room for a Training header
    - Committee chairs will need training in how to post to NYSFAAA website; can be done in a break-out session
    - Need an Executive Council photo policy approved
    - What is next step: TICC should make revisions, clean up page 2, review the News list change, then come back to Executive Council for a vote of approval.
- Conference 2018 – Gina Soliz
  - Co-chairs: Gina Soliz, Kathy Flaherty and Tami Gilbeaux, with help from Darrin Rooker and Sonya Griggs.
  - Contract is almost ready with Marriott Syracuse Downtown
  - Conference 2017 has vendor fee of \$600 and 2018 has \$500 vendor fee in budget. Executive Council should discuss this and make a decision. Executive Council will let Gina know of their decision
  - Will contact Scott Atkinson/BJ Reville or Melanie for conference timeline information
  - Committees are forming
  - Working on a theme/keynote speakers
  - Nancy Teodecki is leading Anniversary Committee/special celebration
  - Grad symposium and Guidance Counselor Workshop as pre-conference activities
  - Dates: Oct 23-25, 2018
- Regional Reports (con't from previous day)
  - Region 6
  - Region 7
  - Region 8
- Review of Operational Calendar
  - June revenue sharing by June 30; some adjustments may be made in this check for overpayment on last revenue sharing
  - August – send out Business meeting notice

<b>New Business</b>
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- Letter of Recognition to Jeff Baker from NYSFAAA on his retirement.
- Motion: A motion was made by Kerry Lubold, seconded by Howard Leslie to recognize Jeff Baker for his years of service to NYSFAAA with the 2017 Lifetime Achievement award. A vote was taken with all in favor; no oppositions and no abstentions.

### **Future Meetings**

- August 17<sup>th</sup> – Remote meeting- should be AUGUST 16: 2:00-4:00 pm
- October 9<sup>th</sup> -10th – Westchester Marriott, Tarrytown (Conference starts at 10:00 am)

As there was no further business, a motion was made by Kathy Michalski, seconded by Rob Zasso to adjourn the meeting. The meeting was adjourned at 11:36 am.

# Region 1 Report

## NYSFAAA Exec Council Meeting

Date June 5, 2017

### 1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: March 30, 2017 at Villa Maria College

May 18, 2017 at Medaille College

Attendees = 13 at Villa Maria

16 at Medaille College

Topics and Training details: Topics from March 30<sup>th</sup> meeting - NYSFAAA had a table at the National College Fair that was held in Buffalo on March 15<sup>th</sup> & 16<sup>th</sup>. Curt Gaume and Dan Hunter represented NYSFAAA at this event.

Tami from Inceptia mentioned a few products from her company – a verification processing option and a loan information service they sent to students on the colleges behalf.

Roundtable discussion on PPY & 399 codes

Discussed summer outing and requested suggestions

Elections are coming up for President- Elect and Treasurer-Elect. Let myself or Kerrie know if you are interested in running for either office

Topics from May 18<sup>th</sup> meeting – Regional elections – after much discussion, we will hold regional elections in spring of next year for the 2018/19 year.

Reminder that Support Staff is being held on June 7<sup>th</sup> at 716.

Discussed summer outing – will send email with outing information to the region.

Roundtable discussion – Excelsior Scholarship and ETA

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

Support Staff Workshop – being held on June 7, 2017 at 716 restaurant in downtown Buffalo.

It will be a full day workshop – breakfast and lunch provided

2 **Treasury update:** \$7303 balance as of March 30, 2017

\$7265 balance as of May 18, 2017

3 **Committee Reports** None

4 **Conference news (If your region is involved in Conference planning)** None

5 **Upcoming meetings and events** Summer outing on June 29<sup>th</sup> at Buffalo Bisons game

- 6 **Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)** Discussion was brought up about the frequency of our conferences. Suggestion – maybe hold the conferences every other year. Reason being – attendance is down and school have limited funds – schools chose the FSA conference. There is a lot of planning that goes into these conferences.

## Region 2 Report

### NYSFAAA Exec Council Meeting

Date June 2017

#### **2. MEETINGS SINCE LAST EXEC COUNCIL MEETING**

- Date and Location: February 10 , 2017- SUNY Geneseo  
Attendees = 21

Topics and Training details: Darrin Rooker provided the President's State of the Association address and then followed by the SWT. A regional meeting was held after the SWT. Region co-chairs are still working with Monroe County Guidance Counselor Association to try to be part of their workshops so NYSFAAA can present FA information to their members. There was an event on December 16<sup>th</sup> that was cancelled due to the storm and it was rescheduled but there wasn't enough time to present because we were only given 24 hours' notice. Maribel from MCC saw a flyer made for HS students to notify them of the FAFSA Fest and it had inaccurate information. We need to be vigilant of community events relating to FA and be sure that the information provided is correct. We then had a lengthy discussion regarding membership and theories as to why membership reduction is happening. Some theories were a lack of support from the top administration and younger workers being more accustomed to working remotely as opposed to face to face interactions and don't see the benefit of joining.

- Date and Location: March 17, 2017-University of Rochester  
Attendees =18

Topic and Training details: A lengthy discussion on membership took place with ideas and suggestions for increasing the members. One of the most promising seems to be to have directors reach out to other directors to encourage membership. Also if they don't attend meetings find out why they don't feel there is a value in attending. It was suggested to allow for one remote regional meeting and see how that works out. Another suggestion is to get together at events in the community. For example meeting up at local festivals or doing a 5K run. We also discussed having a Staff Support Workshop since it has been 3 years since Region 2 offered this. Possibly looking at June 2018. The regional seat for Exec Council will be open and an election will take place in May or early June. Margaret provided a description of the role and what duties are expected of the rep. The meeting concluded with a discussion about Financial Literacy and what schools are doing

- Date and Location: April 7, 2017-GCC  
Attendees=12

Topic and Training details: More discussion ensued on increasing membership as a result of the previous meetings discussion. The co-chairs are working on an action plan. They are in the process of sending out a survey to the Directors in Region 2. Cost may be a factor for folks not getting involved too. The question of Institutional membership came up again. There was also a

discussion regarding getting a bus to transport members to the Conference in Tarrytown. Megan is looking into this. After the regional business Pamela Wait from Ascensus presented on 529 Plans.

- Date and Location: June 16, 2017-Dave and Buster's Attendees—12-15

**7 Other Training events that Region was involved in :**

**Example – CGNY, Guidance Counselor workshop?**

Renee Dann reported that all 7 College Goal and FAFSA events were very successful. Attendance at the East High College Goal Sunday was about half the normal amount of attendees. Was it due to early FAFSA? Maybe we need to consider moving the date? RCAN FAFSA events were well attended but College Goal fell a little short. The co-chairs are looking into a Staff Support Workshop for June 2018.

**8 Treasury update:** As of 04/07/17 the balance is \$2,327.46. It includes our revenue sharing check of \$625.00.

**9 Committee Reports:** Elections were held and Shalena Clary from U of R will be the new Region 2 Exec Council rep replacing Margaret Christian at the Conference in October 2017.

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

N/A The final conference 2016 report was submitted to Exec Council

**11 Upcoming meetings and events:** Our end of year summer meeting will be held on Friday June 16, 2017

**12 Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)** Should Council revisit Institutional memberships again?

**Submitted by: Margaret Christian**

**June 9, 2017**

# **Region 3 Report**

## **NYSFAAA Exec Council Meeting**

### **June 19-20, 2017**

#### **MEETINGS SINCE LAST EXEC COUNCIL MEETING**

**May 5, 2017**                      **Tompkins Cortland Community College**                      **16 attended**

Membership report given by Kevin Shults reflects 179 active members for the region. We are the second largest region as far as membership is concerned and all of our members have paid their dues.

Lisa Simpson called in with a HESC update. She discussed all of the five programs passed with the 2018 NYS Budget. LaSonya and Darrin gave a brief Executive Council update. The region has requested that more information be presented to the membership in a written format of Executive Council activities.

Gina Soliz gave a conference 2018 update. We are working on a tentative agenda, keynote speaker and committee assignments.

**March 17, 2017**                      **Onondaga Community College**                      **19 attended**

We had an Executive Council report from LaSonya Griggs and Darrin Rooker. Kathy Flaherty gave committee reports for Elections, Awards, Scholarship and Membership committees. Region 3 is currently seeking all officers; executive council representative, secretary, treasurer and chair. We are seeking a new representative for the Awards Committee from our region. We are looking for additional representatives to serve on the Scholarship Committee. Kevin Shults provided us with a treasury and membership report for the region. We currently have 21 retiree members, some of whom continue to attend regional meetings.

Discussed IRS DRT, 399 codes, issues with completing the APTS forms and campus based work-study.

#### **OTHER REGION 3 TRAINING EVENTS**

None, other than NYSFAAA webinars.

#### **TREASURY UPDATE:**

Current treasury balance is: \$5,427.92

Transactions since last meeting: Received regional check for \$855 and ordered new checks.

**COMMITTEE REPORTS** None

#### **CONFERENCE NEWS (IF YOUR REGION IS INVOLVED IN CONFERENCE PLANNING)**

#### **UPCOMING MEETINGS AND EVENTS**

The next Region 3 meeting will be held in September at SUNY Oswego

#### **REGIONAL COMMENTS/RECOMMENDATIONS (If your region has pressing issue(s) that need to be brought to the attention of council)**

Recommendation from Region 3: When a member leaves one institution and starts working at another college, NYSFAAA communications are still being sent to the individual's old email address. We would like to suggest that this be changed so that when a member updates their institution and email, that this information overwrites previous contact information.

## Region IV Report

### NYSFAAA Exec Council Meeting

June 19, 2017

#### **3. Meetings:**

- a. February 10, 2017 Statewide Training event at Empire State College. We had breakfast and then viewed PPY training together. We also provided lunch throughout the meeting followed by snacks and a regional meeting. We had 17 members in attendance, although our registration numbers were around 30. We believe the weather/snow was a deterrent from traveling. We chose not to offer the virtual meeting option for our region that day but may decide to in the future if inclement weather is a threat.

13 **Other Training events that Region was involved in:** College Goal Sundays participation

14 **Treasury update:** \$7225.17 current account balance.

15 **Committee Reports:** Membership: 119 Associate, Affiliate, Retired and Life Member; 106 active.

16 **Conference news:** None

17 **Upcoming meetings and events:** We had a nicely attended holiday/new year gathering in January. Feedback that I received was very positive. A summer gathering was discussed but as we get closer folks seem to be busy with getting ready for fall and out on vacations.

#### **18 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 V Report

## NYSFAAA Exec Council Meeting

### June 19-20, 2017

#### MEETINGS SINCE LAST EXEC COUNCIL MEETING

**Date/Location/Attendees:** October 18, 2016, Dinner Meeting at Conference, 14 attendees  
November 18, 2016, SWT, Berkeley College, 23 attendees  
January 27, 2017, Regional Meeting at Culinary Institute, 33 attendees  
February 10, 2017, SWT, Berkeley College, 18 attendees  
May 3, 2017, Region Leadership Phone Conference

#### Topics and Training details:

October Meeting – Region 5 invited all regional members attending the NYSFAAAA Conference to come for a dinner meeting the first night of the conference. We made introductions, gave a report of upcoming events, and found this event to be a great ice breaker for members of the region attending the conference.

November Meeting – Statewide training event followed by a regional meeting and luncheon. Discussed future meetings, reminded members to get involved with NYSFAAAA/committees and regional events, gave Exec Council update and Treasurer’s report.

January Meeting – Guest speaker, Lisa Simpson, gave a very informative HESC update and answered questions about current hot topics. Joanne Sullivan, Region Chair, encouraged members to consider running for regional office. Shared Exec Council report and Treasurer’s report.

SURPRISE GUEST PANEL! Diane Donohue invited retired NYSFAAA members who were very involved with Region 5 to come have a round table discussion and motivate the region with event ideas and help encourage involvement. Great stories were shared by Heather McDonnell – Sarah Lawrence (travelled all the way from Puerto Rico), Dan Sistarenik – SUNY New Paltz, Jerry Kelly – Bard, and Sue Sheehan – Orange CCC. Michael Fraher – Vassar, was scheduled to attend but unfortunately was sick the day of the meeting. These past regional officers strongly encouraged us to coordinate a Support Staff Workshop in the near future. We would love to talk with other regions that have coordinated a workshop to get some ideas. Following the meeting we had a delicious luncheon at the Culinary’s American Bounty Restaurant.

February Meeting – SWT, PPY's Impact - From Tax Questions to Professional Judgment. Offered SWT, luncheon, and regional meeting to encourage attendance. Due to the weather many members ended up viewing webinar instead of attending.

May Leadership Meeting – Held a conference call regarding setting up June event and other issues such as upcoming elections. Wanted to schedule an event around the Excelsior Webinar but we weren’t given

enough notice. Looking to hold an event and bring in a speaker. Also want to start planning for a Support Staff Workshop.

**Other Training events that Region was involved in:**

**Treasury update:**

As of June 20, 2017 the Region 5 treasury has a balance of \$9,179.80.

**Committee Reports**

Dan Robinson, Pace University, Election Committee Rep – helped us notify the region about elections. Sent out a request for nominees. Results for the Region 5 leadership are as follows:

Cindy Garvey, St. Thomas Aquinas, Chair

Perry Brown, The College of Westchester, Treasurer

Tami Gilbeaux, Inceptia, Secretary

Joe Weglarz, Marist College, Exec Council Rep

**Upcoming meetings and events**

Sent out a Survey Monkey and there was interest in a meeting during June regarding Excelsior and Year-Round Pell.

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

# Region 6 Report

## NYSFAAA Exec Council Meeting

### June 20, 2017

#### 4. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location:

Next Meeting June 23, 2017

Topics and Training details:

#### 19 Other Training events that Region was involved in :

**Example – CGNY, Guidance Counselor workshop?**

#### 20 Treasury update: \$6529

#### 21 Committee Reports N/A

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

- a. Program Agenda is set and presenters have been notified. Very robust and different agenda.
- b. Keynote Speaker has been selected Dr. Steven Perry
- c. All major committees have been set. Will add transportation committee chair.
- d. Looking for a few more volunteers to help and chair committees.

#### 23 Upcoming meetings and events

- a. Next Meeting June 23<sup>rd</sup>. Summer Meeting (Dinosaur BBQ)
- b. Agenda
  - i. NYS Update: Excelsior/ETA- Mike Turner, NYSHESC
  - ii. Open Forum Discussion: Verification Changes
  - iii. Discussion on New Administration's Proposed Changes will effect SFA-Howard Leslie, Berkeley College.
  - iv. Conference 2017 Planning-Region VI Committee.

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

New Region VI Officers will be announced soon. Confirming positions.

## Region 7 Report

### NYSFAAA Executive Council Meeting

June 19 and 20, 2017

Submitted by Amy Thompson St. Joseph's College

#### **1. Meetings Since Last Exec Council Meeting**

- a. April 7, 2017 Regional Meeting at Five Towns College
  - i. 31 attendees
  - ii. Topic: "A Unique Approach to Educating Students on Financial Planning and Money Management in a Real-Life Game of Life" presented by Renee Pelletier, Senior Financial Aid Advisor/Financial Literacy & Default Management Specialist at Stony Brook University
  - iii. HESC Update presented by Michael Turner, Client Relations Manager at NY State Higher Education Services Corporation
- b. June 16, 2017 Summer Outing at Snapper Inn, Oakdale
  - i. attendees unknown at time of report
  - ii. Topic: "Veteran's Benefits" presented by Dr. Richard Robitaille, Associate Vice President of Military and Veteran's Affairs at Berkeley College

#### **2. Other Training Events That Region Was Involved In**

- a. n/a

#### **3. Treasury Update**

- a. \$2,732.46 balance as of June 7, 2017 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. TBD

#### **7. Regional Comments/Recommendations**

- a. N/A

***NYSFAAA President's statement delivered at the May 25, 2017 HESC Board of Trustees meeting.***

Good afternoon,

I first would like to congratulate Dr. Linares on his appointment as HESC President. NYSFAAA looks forward to working with you for many years to come.

With regulations and administrative processes being finalized for the State's new financial aid programs, NYSFAAA stands ready to support any efforts to inform the College Aid Administrators throughout New York State on the operations and delivery of these programs. I can tell you that currently there is a notable level of angst within the entire financial aid professional community. This is not surprising, since these are the individuals who tend to be held accountable for their school's compliance with these programs. Compliance meaning, not only, with the new HESC and State Education Department regulations, but also there resulting effect on staying in compliance with Federal Student Aid programs.

Along with everyone else here today, it is NYSFAAA's goal to ensure that these new programs have a successful start, but that will only occur with intensive training. The next three months will go by very quickly. Thousands of students and families across the state need complete and detailed information delivered to them, by fully trained financial aid administrators. NYSFAAA is offering its technology and training delivery methods, that include webinars, regional meetings and annual conference to help assist in these training efforts.

I would be happy to take any questions you may have at this time.

Thank you.

**Region 8 Report**  
**NYSFAAA Executive Council**  
**Date: 6/12/2017**

**1. Meetings Since Last Executive Council Meeting**

**Date and location:** Nothing significant to Report

**Topics and Training details:** Nothing significant to Report

**2. Other Training events that Region was involved in:** No other training to report.  
**Example – CGNY, Guidance Counselor workshop?**

**3. Treasury update:** \$3,484.49 as of 1/26/2017. No major change since then.

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

**5. Conference News:** No news

**6. Upcoming meetings and events:** None

**7. Regional comments/recommendations :** None

<b>2017 NYSFAAA CONFERENCE PROGRAM</b>			
<b>Westchester Marriott</b>			
<b>Tarrytown, NY</b>			
<b>October 10 - 12, 2017</b>			
		Presenters	moderators
<b>Monday, October 9th, 2017</b>			
3:00 - 5:00	Registration Open		
1:00 - 5:00	Vendor - Move in/Set Up		
9:00 - 5:00	Executive Council Meeting		
1:00 - 4:00	Pre-Conference?/ NASFAA Course		
	Verification -Lucy/?		
<b>Tuesday, October 10th, 2017</b>			
8:00 - 5:00	Registration Open (closed 12 - 1:45)		
10:00 - 5:00	Vendor Open		
10:00 - 11:15	Key Note Speaker: Dr. Steve Perry		
11:30 - 12:30	Concurrent Sessions		
	Policies and procedures- Ready for review		
	Fun with Taxes	Robert Weinerman	
	Troubleshooting FSA ID Issues		
	Transitioning from cohort default rates to another matrix	Howard Leslie, Clem LaPietra. Tom Kokis	
	Inconvenient Truth Part 2	Todd Moravec	
12:30 - 1:45	Lunch		
	Conference and President's Welcome		
	NASFAA Update - Megan McClean Coval		
2:00 - 3:00	Concurrent Sessions		
	Advocacy and You	Megan McClean Coval	
	How to Speak with Your Congress - Megan McClean Coval		
	How to prevent the top Compliance Audit Issues		
	Engaging Your Students and Alumni with Social Media	Vince Scalise	
	5 Simple Steps to Managing Stress in Your Life		

3:00 - 3:15	BREAK		
3:15 - 4:15	Concurrent Sessions		
	Lost in Translation-International Students		
	New NYSFAAA Website - TICC		
	Public Service Loan Forgiveness, Loan Eligibility, and Repayment Plans.	Clem LaPietra	
	The Future of the Perkins Loan Program	Joe Weglarz, Maria Livolsi	
	First Generation student Success	Shawn Denman	
4:15 - 5:00	Concurrent Sessions		
	Engaging Partnerships to connect with HS students	Temeka Easter	Chris Earnshaw
	In Bookend Loan Counseling Not Enough? Why Some Schools Have Agreed to Require More.	Lynn Higinbotham, Clem LaPietra	Donna Miller, igrad
	How to Make Student Communication Stick		
	Managing subsequent ISIRs	Patti Doonahue	
5:15 - 6:15	President's Reception		
6:15	Dinner on Your Own		
<b>Wednesday, October 11th, 2017</b>			
9:00 - 5:00	Registration Open (closed 12 - 2)		
9:00 - 5:00	Vendor Open (closed 12 - 2)		
8:00 - 9:00	Continental Breakfast		
8:30 - 9:30	Speaker- American Council of Education Terry Hardel		
9:40 - 10:40	Concurrent Sessions		
	Tax Transcript breakdown; reviewing the FAFSA and handling conflicts	Robert Weinerman	
	Would You Read Your Own Website	Kathleen Roebuck	
	How to be a good manager		
10:40 - 11:00	BREAK		



11:00 - 12:00	Concurrent Sessions		
	The Vital Partnership Between the Financial Aid Office and Retention and Persistence		
	Veteran's benefit session		
	Effective recruiting and interviewing		
	HESC Update-new programs		
	Making Financial Literacy "Stick"		
12:00 - 2:00	LUNCH		
	Regional Awards/EASFAA Remarks		
2:15 - 3:15	Concurrent Session		
	TAP Training Session (HESC, SED, OSC)		
	Admissions and Financial Aid- How they must work together to make the dream		
	Developing an Income Share Agreement (ISA) Program at Purdue University		
	The Effects of Modular Based Programs		
	Top 10 mistakes employees make at work		
3:15 - 3:30	Break		
3:30 - 4:30	Sector meetings		
	SUNY - Patti Thompson		
	CUNY - Jim Murphy		
	Private - CICU		
	Proprietary - Ellen Hollander		
	Graduate - Clair Jacobi		
6:00 - 7:00	Cocktail Reception		
7:00 - 9:00	Awards Banquet George Chin recognition and Scholarship recipients		
9:00 - ?	Entertainment?		
9:00 - 10:00	NYSFAAA Business Meeting		
	Federal Update		
10:00 - 10:15	Break		

10:15 - 12:00	General Session/ Conference Closing		
	NYSFAAA Scholarships		
	NYS Update (SUNY/CUNY) - Lisa Simpson		
<b>Thursday, October 12th, 2017</b>			
<b>8:00 - 9:00</b>	<b>Breakfast</b>		
9:00 - 10:00	NYSFAAA Business Meeting		
10:00 - 12:00	General Session/ Conference Closing		
	Federal Update		