



**NYSFAAA Executive Council**  
**October 9, 2017**  
**Westchester Marriott - Tarrytown, NY**  
**8:00am-4:00pm**

**Call to Order & Roll Call**

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

**Guests:**

Shalena Clary – Region II – Incoming Representative  
Patti Donahue – Region III – Incoming Representative  
Joseph Weglarz – Region V – Incoming Representative  
Ajana Wilkinson – Region VI – Incoming Representative  
Debra Evans - Region VII – Incoming Representative

**Discussion via Email**

**MOTION:** A motion was made by Adrienne King, seconded by Kerry Lubold to accept Theodore Malone & Purdue University for active membership.

Mr. Theodore Malone, Exec Director, Division of Financial Aid at Purdue University  
[www.purdue.edu/fa](http://www.purdue.edu/fa) Theodore is going to be a presenter for our conference & his college needs to be approved so that he can register for the conference.

There was no discussion. The motion passed with a quorum vote in favor.

#### Discussion via Email

**MOTION:** A motion was made by Adrienne King, seconded by Kerry Lubold to accept Julia Joggerst & CommonBond for associate membership.

CommonBond is a financial technology company on a mission to make student loans more transparent, simple, and affordable. Combining competitive rates and award-winning customer service for both undergraduate and graduate students, CommonBond has created a better borrowing experience – and funded over \$1 billion in student loans for tens of thousands of members.

The company's enterprise platform, CommonBond for Business™, enables employers to offer a suite of student loan repayment benefits to their employees, helping attract and retain top talent in today's workforce. And CommonBond is the first, and only, finance company with a "one-for-one" social mission: for every loan it funds, CommonBond also funds the education of a child in need, through its partnership with Pencils of Promise.

[https://commonbond.co/?utm\\_source=bing&utm\\_medium=cpc&utm\\_campaign=Bing\\_Search\\_Brand\\_Alpha&utm\\_term=commonbond&utm\\_content=commonbond&utm\\_campaignname=bing\\_search\\_brand\\_alpha](https://commonbond.co/?utm_source=bing&utm_medium=cpc&utm_campaign=Bing_Search_Brand_Alpha&utm_term=commonbond&utm_content=commonbond&utm_campaignname=bing_search_brand_alpha)

There was no discussion. The motion passed with a quorum vote in favor.

#### Discussion via Email

**MOTION:** A motion was made by Adrienne King, seconded by Amy Thompson to accept Michael Sapienza & College Raptor for associate membership.

Michael Sapienza, Director of College Partnerships for College Raptor [www.collegeraptor.com](http://www.collegeraptor.com)  
About College Raptor: College Raptor offers a college match website for use by students and families, and we also provide a variety of enrollment related services to colleges and universities. Our website ([www.collegeraptor.com](http://www.collegeraptor.com)) matches students to colleges and universities around the country based on their preferences and academic profile. Unlike other college search sites, however, College Raptor also develops net price estimates to help families get a sense of affordability as well.

There was no discussion. The motion passed with a quorum vote in favor.

#### Discussion via Email

**MOTION:** A motion was made by Adrienne King, seconded by Kerrie Cooper to accept Peter Terebesi & Higher Ed Executives for associate membership.

Peter Terebesi & Higher Ed Executives [www.higheredexecutives.com](http://www.higheredexecutives.com)

Higher Ed Executives is a full service consulting firm providing assistance to schools and colleges with matters related to Financial Aid, Accreditation and overall school administration. Our clients are primarily private not for profit and public colleges and universities however our expertise extends to for-profit colleges as well.

Our core belief is that through training and support, schools and colleges can gain the skills necessary to meet the rigorous regulatory standards contained in the Higher Education Act, hence our motto - "*Empowering Administrative Capability*".

Unlike a third party servicer, we seek to impart our skills and knowledge on our clients so that they can successfully manage their campuses. Thus our services are structured to provide focused compliance and training support, not outsourcing.

Our staff currently serves on committees for financial aid associations in nearby states including CT's CAPFAA, MA's MASFAA and regionally through EASFAA. We look forward to the opportunity to serve NYSFAA too.

There was no discussion. The motion passed with a quorum vote in favor.

#### **Discussion via Email**

**MOTION:** A motion was made by Kerrie Cooper, seconded by Robert Zasso to accept the draft of the NYSFAAA 2017-2018 Goals and Objectives (attached at end of report).

There was no discussion. The motion passed with 13 in favor, no oppositions, and no abstentions.

#### **Discussion via Email**

**MOTION:** A motion was made by Melanie Williams-Bethea, seconded by Kerrie Cooper to serve alcohol at the NYSFAAA Conference 49.

There was no discussion. The motion passed with 12 in favor, no oppositions, and no abstentions.

#### **Approval of Minutes – via Email**

**MOTION:** A motion was made by LaSonya Griggs, seconded by Kelly Kelly to accept the minutes from the August 16, 2017 meeting. There was no discussion. The motion was passed with all in favor, no oppositions, and no abstentions.

Minutes were then sent to Ideta to post to the NYSFAAA website.

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Darrin Rooker called the meeting to order at 8:40am with a quorum of Executive Council present.

#### **President's Report – Darrin Rooker**

- Not a lot since last meeting
- Going to Burlington, VT next month
- Treasurer, Dawn Mosisa-Lowe, can no longer fill the roll due to personal reasons. Pat Johnson will fill in.
- Thought force committee
  - Put together by NASFAA
  - Sharing responsibilities when it comes to services, legal advice, and training
  - Would like to explore with other states
  - Concerns with smaller states is that they don't have the infrastructure
  - Agree on mission statement?
  - Thought Force Committee will not pursue this idea of association collaboration at this time.
- Reserved tables for executive council at banquet and scholarship winners
- George Chin family members will be attending banquet-will say a few words
- President of HESC will be attending the conference. Will be here all day Wednesday attending the sessions and lunch. He wants to meet people-introduce yourself!

#### **Past-President's Report – Kerrie Cooper**

- Election Results
  - Already voted in June to destroy the ballots
- EASFAA conference – let her know if you know of anyone would like to do a session or do a session themselves – need volunteers
- Governance

- Still working on long range plan
- Look at mission statement on homepage-not in governing documents

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

- 2015/2016      Closed
- 2016/2017      1259 members (93% goal of 1350)  
Dues = \$79,710.00 (88% goal of \$91,000.00)
- 2017/2018      Goal of 1350  
Due goal = \$91,000.00
- Able to see nonmembers trying to get into system-sends out formal application for membership
- Engage affiliate members
- Engage active members to participate more-get them out to meetings
- Suggestion of getting members together outside of region meetings as a new way of meeting-importance of net working
- New members getting together in off hours-maybe even have region meetings outside of office hours
  - Issue may be finding a place
  - Cost of rest space
  - Traveling with a widespread region
- What is expected at regions is determined by each region-EC region reps should report

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

- Darrin updated for Howard
- New look to website-fresh and modern
- Working on committee updates
- Executive Council meeting minutes will now be approved via email and then posted to the website prior to the next Executive Council meeting-notification to members will give instructions on how to find on website
- Some items are hard to find on the website
  - Main page is great but can get lost when diving into the website
  - Where are some documents located?
- Email blast to go out for November 16 statewide training-Executive council reps should touch base with their region as to what they plan to do (breakfast, lunch, meeting)

#### **Secretary's Report – Kelly Kelly**

- Annual Report in process
  - Still obtaining annual reports from regions and committees
  - Will send another reminder after the conference
  - Working with Darrin on the report-will announce when report is available
- Outreach Committee (LaSonya)

- Very proud of what we do
- Since LaSonya will be NYSFAAA president, she is taking a lesser role to the committee
- Volunteers needed

#### Treasurer's Report – Robert Zasso

- Status reports distributed for review
- Looking into accounts receivable
- Updating committees next year-development committee review
- Meeting with auditors tomorrow for 2015/2016-full report tomorrow morning
- Conflict of interest policy statement-new members to sign
- Will send updated reports

#### HESC Update

- One application now created-FAFSA still needs to be completed first
  - Freshman students still need to complete full application
  - Upperclass students will be asked questions, will see recipient of other scholarships and asked if want to file TAP application (yes or no)
- 18/19 Processing started October 2<sup>nd</sup>
  - Sending out notification of residency issues
  - All contact being done through email
  - Want to clean up accounts before sending out Student Status Listing
  - Reminder: HEOP and EOP no longer an options for students to check on application-school must update on the website of this population
- AIM Scholarship
  - No new funding
  - Was a 2-year proposal
  - No new awards
- STEM scholarship going live October 1<sup>st</sup>
- All applications in for excelsior scholarship-still working on
- Excelsior probably opening up at end of month for the spring semester applications
  - If a student missed for fall they can apply for spring
  - If they were approved but did not attend for fall, they need to apply again for spring
  - If student had to cancel, they have to reapply
- Requests for school counselor workshops-waiting to see on funding
  - Important to have as there are new people in positions and new programs to know about
- Nocive-bid going out for new location
  - Would like location to be no more than 45 minutes from public transportation
  - New: training going from Monday-Friday (June 4-8)
  - Wanting to offer one price for materials
  - Meeting to determine the best way to deliver the materials

- In need of people to review the chapters-contact Lisa if interested

### Old Business

- Ironbridge discount training offer contract
  - NYSFAAA members to get discount
  - Conflict or tax implications?
  - Auditors need more information to make a judgement-more detail in contract
  - Ironbridge does not plan to provide further information
- Conference 2017
  - Full breakfast 8:30-9:30
  - A lot of great topics at conference
  - Vendor room-put the puzzle together!
  - Collection to Red Cross for Puerto Rico-at registration desk
  - Karaoke after dinner on your own
  - No first time reception but Nancy and Amy reached out to all new to the conference
- Conference 2018
  - October 23-25, 2018
  - Discussion at last region III meeting
  - Narrowing down the committees and volunteers to assist
  - Looking for ideas for sessions
  - Looking for any pictures or memorabilia
  - Looking for keynote speaker
  - Shuttle to Destiny?
  - Comment to invite past presidents of NYSFAAA
- Calendar
  - October-Business meeting, audit, new officer, no constitutional changes
  - November-Novice bids
  - December-Revenue/treasurer region reports need to be up to date

### New Business

- TAP white paper
  - Committee did their work and revised the white paper-approved by executive council to deliver in Albany-this was during the time of the excelsior scholarship announcement
  - Proper funding for TAP is the main priority now
  - White paper only speaks for TAP itself
  - Movement in redefining some things
  - Look at TAP as a whole
  - Public hearings-be more proactive, know what hearings are scheduled when, and have more of a voice
  - TAP has not had a significance increase in many years-falling way behind
  - Consumer index and cost of living have increased-no match with TAP increase

- Next year, focus o increase of TAP-continue to talk about how it has not kept up with the cost of living increase
- Student at high need getting full TAP (no excelsior)
- Grad TAP-could be harder to get back
- Need to continue to educate the legislative offices
- Focus from student prospective
- Scholarship
  - \$12520 donation to the George Chin Memorial Scholarship
    - Donations from all over
    - Lumina Foundation donation of \$5000
  - Conference having basket raffles and 50/50
  - Cookbooks
    - At a profit of \$1300
    - Sold 299 so far with 251 to sell
    - Total profit would be \$3810 if all books sell
  - Suggestion to have 50/50 at each region meeting to then go towards scholarship
  - Reviewing questions on scholarship application
- Conference 2019-looking for a region to host

<b>Other Information</b>
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- 2017 Executive Council Region Reps:
  - Region 1 – Kathy Michalski remains for second term
  - Region 2 – Shalena Clary, University of Rochester
  - Region 3 – Patti Donahue, Binghamton University
  - Region 4 - Michelle Fontaine remains for second term
  - Region 5 – Joe Weglarz, Marist College
  - Region 6 – Ajana Wilkinson, Kingsborough CC (CUNY)
  - Region 7 – Deb Evans, Adelphi University
  - Region 8 – Stacey Hawkins, Clarkson University
- Sharing FAFSA Information
  - Request from student-information goes back to student-they provide to 3<sup>rd</sup> party
  - What should be asked on scholarship applications?
  - Cannot provide information from FAFSA
  - Suggestion to have statewide training on this topic
- Region meetings
  - Combining region meetings
  - Get to know people at region meetings
  - Calling directors-who are you sending to meetings? Who represents your school?
  - Working with other departments on your campus-open up training to other departments
- Annual Report
  - Darrin to first read and review all reports
  - How many people read it?
  - Sending out information as to where to find the annual report on the website (not just the link to view it)

- Darrin wants comments and feedback from the annual report.

#### **Regional Updates**

- Attached in report

#### **Future Meetings**

December 12, 2017 2:00-4:00 – Remote meeting

February 12-13, 2017 8:00-4:00-Albany (Advocacy Day-Tuesday, February 13th)

As there was no further business, a motion was made by LaSonya Griggs, seconded by Kerrie Cooper to adjourn the meeting. The meeting was adjourned at 3:40pm.

## 2017-2018 NYSFAAA Goals and Objectives

### **Goal: Retain Membership**

Objectives:

1. Maintain relevant website

Strategies:

- Timely posting of events
- Increasing interest in blog writing
- Promote government relations activities through the website and listserv

2. Involve newer members in the Organization

Strategies:

- Rejuvenate NYSFAAA's mentorship activities
- Encourage member participation in Outreach events
- Individually ask for their participation at the regional level

3. Explore new revenue streams to support training, advocacy and outreach efforts

Strategies:

- Renewed effort to increase membership
- Establish investment committee
- Provide training in grant identification and grant writing
- Explore possible collaborations with NYSOBBA & EASFAA on training

### **Goal: Support Advocacy**

Objectives:

1. Increase participation in advocacy

Strategies:

- Offer training opportunities on being an advocate
- Include regular Conference Session on government relations
- Reach out to those political leaders seeking re-election
- Develop participation opportunities

2. Continued support of TAP Change

Strategies:

- Advocating for elimination of SUNY tuition credit and increased TAP funding

### **Goal: Increase Outreach**

Objectives:

1. Increase membership participation in College Goal Events

Strategies:

- Training newest members as presenters (Mentor)
- Recruit regional membership to School Outreach Committee

2. Encourage future involvement/leadership

Strategies:

- Encourage Executive Council members to bring a guest to meetings
- Announcement of Times and Location of Executive Council Meetings
- Include regional members on statewide Professional Development Committee
- Regularly held Intermediate Training

3. Network with regional and national financial aid organizations

Strategies:

- Consulting on training topics and opportunities
- Provide training to Community Based Organizations and affiliated groups.

**Goal: Develop NYSFAAA Vision & Mission Statement**

Objectives:

1. The Vision & Mission will serve to drive the Long Range Plan

Strategies:

- Appoint ad hoc Strategic Planning Committee
- Create draft Vision & Mission Statement for review by Executive Council

2. Begin planning for next Long Range Plan

Strategies:

- 2016-17 is last year of current Long Range Plan
- New Vision & Mission Statement would be basis for new Long Range Plan
- Use various methods to gather input from entire membership

# Region \_\_1\_ Report

## September 29, 2017

- **MEETINGS Held This Year - 7 meetings**

Date and Location: 10/5/16 Hilbert College – 20 attendees  
11/18/16 SWT- Hilbert College – 24 attendees  
12/8/16 Classics – 32 attendees  
2/10/17 SWT – Hilbert College – 27 attendees  
3/30/17 Villa Maria College – 13 attendees  
5/18/17 Medaille College – 16 attendees  
6/29/17 Bisons game – 9 attendees

Topics and Training details: Roundtable discussion on Prior- Prior. Teach Grant, Cohort Default Rates, Exit Counseling, new C Code 399, Conference update, Justin Draeger’s Podcasts, and upcoming Statewide Training on November 18<sup>th</sup>

Support Staff Workshop to be held in the spring, National College Fair to be held at the Buffalo Convention Center on March 15 & 16, Statewide Training to be held at Hilbert College on February 10<sup>th</sup>.

Congratulated our Region 1 award recipients: Jeanne Mossios –Service Award

Matt Metz – Rising Star

Dan Hunter – Lifetime Achievement Award

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.

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 :** St. Bonaventure is hosting a Guidance Counselor Workshop on November 15, 2016

Support Staff is being held on June 7, 2017 at 716.

- 2 **Treasury update:** \$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 :** October 5, 2017 at Hilbert College
- 6 **Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)**

**Submitted By:** Kathleen Michalski

**Date:** September 29, 2017

# Region 2 Annual Report

Date 10/09/17

## 1. MEETINGS Held This Year:

- Date and Location: September 23, 2016- SUNY Geneseo  
Attendees = 22

Topics and Training details: A regional meeting was held with updates by Committee chairs and then followed by training. Scott Atkinson presented on how to prepare for a Federal Program Review. SUNY Brockport had recently gone through one and Scott explained the process and gave some very important tips. Megan Kennerknecht talked about Middle States and the new Institutional Compliance Report (ICR) which is part of the Periodic Review Report (PRR).

- Date and Location: November 18, 2016- SWT held at RIT  
Attendees = 29

Topics and Training details: SWT training was held and then followed by a Regional meeting. The topic of discussion was on the "399 Code" and what schools are seeing and what schools are doing to resolve this.

- Date and Location: December 9, 2016- Finger Lakes Gaming and Racetrack  
Attendees =14  
Updates by committee chairs were given and then a discussion was led by those members who attended the FSA Conference. Conference attendees discussed relevant sessions that they attended. After our discussion a holiday activity and lunch was enjoyed by all.

- Date and Location: February 10 , 2017- SWT at 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

Topic and Training details: After the regular updates we just had an informal discussion about meetings for the 17-18 academic year. We also discussed why our treasury balance isn't higher and what we could do to increase funds. The co-chairs were requesting \$3,500 from NYSFAAA to help with regional expenses.

## **2. 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

## **3. Treasury update:** Balance as of June 16, 2017 is \$1902.62

4. **Committee Reports:** Elections were held and Shalena Clary from the University of Rochester will serve as the next Exec Council rep beginning October 2017.

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

N/A

6. **Upcoming meetings and events :**

September 22, 2017-SUNY Geneseo

September 27, 2017-Rochester College Nights-Marketplace Mall

September 28, 2017-Rochester College Nights-Greece Ridge Mall

November 16, 2017-SWT-TBD

December 15, 2017-Holiday meeting-TBD

February 2, 2018-Guidance Counselor Workshop

February 2018-SWT...TBD

March 16, 2018-possible joint meeting with Region 1

April 27, 2018-possible joint meeting with Region 1

May 25, 2018-Final meeting-TBD

June 14, 2018-Support Staff Workshop-RIT

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

If regional funds are limited and requests for additional funding are denied, what other options exist so that the region can offer workshops and outreach?

**Submitted by:** Margaret Christian

September 26, 2017

# Region IV Annual Report

## September 29, 2017

- **Meetings Held during 2017-2018 Year**
  - a. November 18, 2016 Statewide Training event at Empire State College. We had breakfast, viewed Aaron Lacey's Borrower Defense Rules training together and then had lunch followed by a regional meeting. The regional meeting included a HESC update by Lisa Simpson. We had 26 members in attendance.
  - b. January 20, 2017 New Year gathering at Wheatfields. We hosted an informal meeting from 5:30-7:30 while enjoying snacks and refreshments. We had 14 attendees including 2 new members. Feedback was very positive.
  - c. 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.
- **Other Training events that Region was involved in:** We assisted with College Goal Sundays and SUNY Financial Aid day.
- **Treasury update:** \$7625.17
- **Committee Reports:** Membership: 119 Associate, Affiliate, Retired and Life Member; 106 active.
- **Conference news (If your region is involved in Conference planning):** None.
- **Upcoming meetings and events:** November 16 Statewide Training Event at Empire State College. We will also have a region IV meeting/update following lunch and we are working on securing other speakers/presenters.
- **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

### October 9, 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  
September 15, 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.

September Leadership Meeting – Discussed nominations for regional awards, due to Rob Zasso by end of September. Finalized plans for SWT location (Berkeley) for November training, need to hold regional meeting/vote to decide about holding dinner meeting at Conference for Region V, suggest review list of current regional reps so we can encourage participation and attendance for regional meetings, asked new chair and exec council rep to submit a bio that can be added to website. Cindy Garvey agreed to design Survey Monkey to send to region to take vote on holding Region V Dinner Meeting on Tuesday Oct 10 at Conference. Survey resulted in yes vote to hold meeting and have region members pay \$20 and treasury subsidize remaining cost (not including alcoholic beverages).

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

**Treasury update:**

The current balance in the Region V account is \$9,844.80.

**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**

October 10, 2017 – Dinner meeting for region members attending the NYSFAAA Conference.

November 16, 2017 – SWT Event, luncheon, and Region V meeting – Berkeley College.

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

# Region 6 Report

12/21/2017

- **MEETINGS Held This Year**

**9/30/16 Teachers College, Columbia University:**

Attendees = 35

Topics and Training details:

11/18/16 Berkeley College, NY

Attendees=

Topics and Training details: SWT event and Regional Update

**2/10/17- Teachers College, Columbia University**

Attendees= 39

Topics and Training details:

- President's Address State of the Association
- PPY SWT Topic
- Region 6 Meeting

**6/23/17 Summer Meeting Dinosaur BBQ Restaurant**

Attendees= 48

- NYS Update: Excelsior/ETA- Mike Turner, NYSHESC
- Open Forum Discussion: Verification Changes
- Discussion on New Administration's Proposed Changes will affect SFA-Howard Leslie, Berkeley College.
- Conference 2017 Planning-Region VI Committee.

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

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

- Several members of Region 6 helped at various Guidance Counselor Workshops, and FAFAS completion events throughout NYC.

**8 Treasury update:**

- As of September 2017 our ending balance is \$5631.81.

9 **Committee Reports: N/A**

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

- Conference Program is complete. We have a powerful agenda that should meet the professional development needs of novices and long-standing NYSFAAA me members. Conference Date October 10-12, 2017 at the Westchester Marriott Tarrytown, NY.

11 **Upcoming meetings and events**

- Fall Kick-off meeting September 29, 2017 at ASA College
- NYSFAAA Conference 49, Tarrytown, NY- Region 6 hosting.
- November 17, 2017- SWT Meeting Berkeley College

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

N/A

**Submitted By: Melanie Williams-Bethea**

**Date: 10/2/17**

Region 7 16-17 Annual Report  
NYSFAAA Executive Council Meeting

September 25, 2017

Submitted by Amy Thompson St. Joseph's College

**1. Meetings During 2016-17**

- a. September 23, 2016 Fall Kickoff Meeting at St. Joseph's College
  - i. 30 attendees
  - ii. Topics:
    - 1. HESC Update presented by Michael Turner, Client Relations Manager at NY State HESC
    - 2. PPY Panel discussion leaders Rosemary Ferrucci (NYIT), Fran Kalish (FIT), Evan Udowitch (Hofstra)
    - 3. PJ Panel discussion leaders Terri Donnell (SCCC), Amy Thompson (SJC)
- b. November 18, 2016 State Wide Training at Hofstra University
  - i. 37 attendees (out of 46 registered)
  - ii. Topic: Borrower Defense Final Rules presented by Aaron Lacey
- c. February 10, 2017 State Wide Training at SUNY Farmingdale
  - i. 56 registered (need final # who logged on from Howard)
  - ii. Had to cancel in person event due to weather, turned it into a regular webinar for our region
  - iii. Topic: Financial Aid & Taxes in the PPY Era presented by Robert Weinerman
- d. April 7, 2017 Region 7 Meeting at Five Towns College
  - i. 31 attendees
  - ii. Topics:
    - 1. "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
    - 2. HESC Update presented by Michael Turner, Client Relations Manager at NY State HESC
- e. June 16, 2017 Summer Meeting at Snapper Inn, Oakdale
  - i. 24 attendees
  - 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. FAFSA completion/College Goal NY events:

- i. Paul D. Schreiber H.S. October 17, 2016
- ii. Brentwood H.S. October 29, 2016
- iii. Wyandanch H.S. November 21, 2016
- iv. Glen Cove H.S. December 14, 2016

**3. Treasury Update**

- a. \$2,268.26 balance 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 2017-18 Meetings and Events**

- a. October 4, 2017 CGNY at Paul D. Schreiber High School, 5:30 p.m. to 8:30 p.m.
- b. October 28, 2017 CGNY at Brentwood High School, 10 a.m. to 2 p.m.
- c. November 16, 2017 State Wide Training at your regional meeting, Adelphi University
- d. Dec 2016/ Jan 2017 Region 7 Holiday Meeting TBD

**7. Regional Comments/Recommendations**

- a. N/A

# Region 8 Annual Report

## September 1, 2015 to August 31, 2016

### 1. Meetings Held This Year

#### Date and location:

9/22/16 - Region VIII Meeting

Location: St. Lawrence University

Attendees: 12 members

Topics and Training: TAP, NYSFAAA Goals and Objectives, Region 8 Committees, Support Staff Workshop, NYS Shopping Sheet, College Goal NY, & High School Nights

11/18/17 NYSFAAA Statewide Training and Region VIII Meeting

Location: SUNY Plattsburgh

Attendees: 9 members

Statewide Training Topic: "The "Borrower Defense" Rules: Understanding the Significant Risks and Complexities of the Department's Latest Proposal"

Topics and Training: President's Challenge, NASFAAA Regional Thought Force, Website Update, Upcoming NYSFAAA Conferences, Shopping Sheet Changes

2/10/17 NYSFAAA Statewide Training and Region VIII Meeting

Location: Jefferson Community College

Attendees: 10 members

Statewide Training Topic: "PPY's Impact - From Tax Questions to Professional Judgement"

Topics and Training: NYSFAAA Advocacy Day, Excelsior Scholarship, TAP White Paper, High School Equivalency for TAP Purposes, develop of a Support Staff Workshop agenda, Early awrds letters, 399 issues, and Gainful Employment.

## **Topics and Training details:**

Instead of the School Counselor Workshops, in September 2016 our region provided a federal and state update at a regional meeting of School Counselors from the North Country.

Over the winter months, high school nights were conducted approximately 63 different high schools and other locations across the North Country. These events covered the basics of college costs and applying for financial aid, as well as assisting families complete the FAFSA. Approximately 1,314 students and families were in attendance at these various locations. Presenters included staff from Clarkson, Jefferson Community College, St. Lawrence University, SUNY Canton, SUNY Plattsburgh, and SUNY Potsdam.

SUNY Financial Aid Days were held in October at SUNY Plattsburgh and SUNY Canton. A total of 28 families for a total of approximately 65 community members attended the events.

Kerry Lubold served as a small group leader during Novice Training at Mount St. Mary's in June.

2. **Other Training events that Region was involved in:** No other training to report.  
**Example – CGNY, Guidance Counselor workshop?**
  
3. **Treasury update:** \$3,721.89 as of 8/31/2017.
  
4. **Committee Reports:** We have 46 active members in the region as of 9/18/2017. The region is struggling to find a new Executive Council Member and Regional Chair. There were no nominations from the membership in an initial query. Several members are searching for someone.
  
5. **Conference News:** No news
  
6. **Upcoming meetings and events:** None currently scheduled.
  
7. **Regional comments/recommendations :**