



**NYSFAAA**

**New York State Financial Aid Administrators Association, Inc.**

# **2020-2021 Annual Report**

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# President's Remarks

## NYSFAAA President

### 2020-2021 Annual Report

I was honored to have been elected in 2019 and receiving the gavel in October 2020 as the first African American President of NYSFAAA at the 52<sup>nd</sup> NYSFAAA Conference. There were two main items that I wanted to accomplish in my first year.

The first was for the Diversity and Inclusion Committee to finally move forward after being dormant for many years. I am proud to say that under the leadership of Tanya Patterson-Stanley as chair and the hard work, steadfastness of the committee, NYSFAAA has a Diversity Equity and Inclusion Statement. This statement was seen and approved by Exec Council during our June Budget Meeting. This statement will be presented to the NYSFAAA membership during the October '21 conference and posted to the website.

The second item was to get our organization more active on social media. While that has not happened as of yet, I know that the TICC committee has recently formed a sub-committee that will handle social media. This sub-committee has recently begun the revamping of NYSFAAA's Facebook page.

The preparation of one's presidency includes many conversations with different people within the organization including your mentors. What is different with my residency is that I have had to contend with a worldwide event that no one before me has ever had to deal with, the year of 2020-2021 has been filled with extraordinary challenges. These challenges have made it impossible for our organization to have meetings, Novice Training, Advocacy Day, and our annual conference in person. We have become an organization that meets in a virtual world for everything. For most of this year our campuses resumed classes online. Our campus lives changed to virtual ones. Due to the world shutting down we worked from home. By the middle of the Spring 2021 term some offices on campus began to open. Employees in these offices began working via a hybrid model. This hybrid model had some of us in the office on certain days of the week while others worked in person during certain weeks of the month.

Our conferences for both 2020 and 2021 are historical because that are both virtual and have the same conference committee. The committee co-chairs, Jeanne McCarthy, and Debra (Debbie) Evans along with their committee has worked hard to provide the membership with great conferences even though they are in a different format than previous years.

In late Spring 2021 we had elections for the next President and Treasurer. I look forward to working with President-Elect Patti Donahue and Treasurer-Elect Tayler Kreutter in the coming year in their new roles.

### **2020-2021 Executive Council**

Adrienne R. King – President – Bank Street College of Education

Howard Leslie – Past President- Berkeley College

Renee Swift – First Vice President – Nazareth College

Brian Smith – Second Vice President – SUNY at Cobleskill  
Shalena Clary – Treasurer – Corning Community College  
Susan Godreau – Treasurer – SUNY Potsdam, Retired  
Anne Sullivan-Polino -Secretary – Bryant and Stratton College  
Lea Nuwer – Region 1 – SUNY at Buffalo State  
BJ Revill – Region 2 – University of Rochester- School of Medicine  
Patti Donahue – Region iii – Binghamton University  
Rochelle Filler – Region IV – Rensselaer Polytechnic Institute  
Joseph Weglarz – Region V – Marist College  
Michelle Bolton – Region VI – CUNY School of Medicine  
Clair Jacobi – Region VII – New York Institute of Technology – Osteopathic Medicine  
Stacey M. Hawkins – Region VIII – Clarkson University  
Lisa Simpson – HESC Liaison

I would like to thank the Council for their hard work and diligence during this challenging year. This Council has been tested in many ways this past year and we have made it to the other side Even though some of us are moving on, Council will continue to work to move our organization forward.

I would like to thank our HESC liaison, Lisa Simpson for continuing to provide the council and membership with information on behalf of HESC. During the Covid-19 pandemic Lisa has continued to provide NYSFAAA with information that we were able to provide to our students and higher education institutions.

### **Goals and Objectives**

- After successfully getting the Diversity and Inclusion Committee off the ground, I look forward to seeing webinars and eventually in person events by this committee.
- Now that there are more people working with the webmasters, I am looking forward to the website being updated with newer pictures and easier navigation.
- Work with the Council, President-elect in seeing if the following needs updating Policies and Procedures; Goals and Objectives Committee Organizational Chart and Strategic Plan. If any or all needs updating, then that will be our objective for the coming year.
- I would like to see more members participate in committees and run for office. Goal would be to see how we can accomplish this and carry it out.

### **Upcoming Meetings and Events**

- Executive Council Meeting Monday, October 25, 2021 via Zoom.
- NYSFAAA 53rd Annual Conference, October 26-28, 2021 via Zoom
- Executive Council remote meetings in December, April, and August
- Executive Council advocacy meeting in Albany in February with legislative visits
- Executive Council planning meeting in June in Lake Placid.

*\*Please note that the last two bullets will occur if we are allowed to do so based on the Covid-19 status.*

## **Conclusion**

Presidency is only as strong as the people of whom you lead and work with. A President does not rule, a president does not boast, a president leads by listening to their organizations needs and try to move their organization further along the path the was originally set by its founders. I would like to thank Exec Council, the Committee Chairs, and the committees for their perseverance amid a pandemic.

Respectably submitted,  
Adrienne R. King

## **NYSFAAA 2019-2020 Goals and Objectives**

### **Goals and Objectives for 2021-2022:**

Review the application process and make any adjustments to help streamline the process. Will make recommendations after our peak season, (and after the conference this year) so we can look at everything to confirm what works, what does not, and recommendations for the future.

## **Mentor Committee**

### **Goals and Objectives for 2021-2022:**

Moving forward into this next year we will look to do a few things.

- I will be reaching out to each Regional Chair and asking for them to nominate someone to serve as a member of this committee so that the work can be divided and we can reach more new members.
- We will use the Novice list and their regions to send a communication out to them asking to get in touch with us should they have any questions. It will also include a survey that they can list information about themselves, things they want to learn more about in the field, and if they would like to be connected with a mentor.
- I'd like to work closely with the Novice team as this is an imperative part of engaging new members. IF we can make a strong connection at the end of Novice, we will have a higher change of success with retaining their engagement in NYSFAAA as a whole.
- I'd also like to encourage well-established NYSFAAA members to present or find other ways to engage new members.

## **Graduate Professional Concerns**

### **Goals and Objectives for 2021-2022:**

- Continue to inform and advise NYSFAAA leadership
- Develop and offer training at the 2022 NYSFAAA conference

## **Development (Fundraising) Committee**

### **Goals and Objectives for 2021-2021:**

- Offering vendors additional options (additional fee):
  - Webinar to showcase a topic/product/service
  - Conference in a box for virtual attendees
  - Vendor acknowledgement at the Conference
  - Vendor spotlight articles
  - Quarterly advertisement

## **Diversity, Equity and Inclusion Committee**

### **Goals and Objectives for 2021-2022:**

- Continued development of resources
- Training
- Certification opportunities

## **Treasurer; Budget Committee; Investment Committee**

### **Goals and Objectives for 2021-2022:**

The primary short term goal is transition out the Past Treasurer and being in the Treasurer-Elect. This process includes the transfer of accounts, administrative accesses as well as banking and credit card authority.

A medium goal is to explore and complete the RFP process for auditing firms. Length of time for audits to be completed as well as cost with the current firm have been discussed on various occasions at Executive Council meetings. A committee will be formed to conduct this research and complete the RFP process.

Finally, requests from our members for an option for electronic payment (ACH/direct deposit) continue to come in. Additional research on how to handle these types of payments needs to happen. At this point, there is not enough information given from the bank to know who the payment is coming from.

## **Government Relations Committee**

### **Goals and Objectives for 2021-2022:**

- Network with and directly collaborate with EASFAA and NASFAA in their Government Relations outreach efforts. Utilize NASFAA's State Advocacy Toolkit resources.
- Explore networking and collaboration opportunities with other NY State higher education professional associations, such as the NY State Association of College Admission Counseling.
- Continue working to raise NYSFAAA's profile amongst members of the NYS Senate & Assembly who serve on their respective Higher Education Committees – with the ongoing goal of presenting & positioning NYSFAAA as an expert resource and sounding board for proposed student aid legislation.
- Continue to actively monitor proposed and passed NYS and Federal financial aid and higher education legislation (including Reauthorization proposals), with the goal of preparing comments, feedback, and where appropriate letters of support/endorsement of such legislation for approval and dissemination by the Executive Council and NYSFAAA President respectively.
- Organize and lead NYSFAAA's participation in the 2022 Student Aid Alliance Advocacy Program, which will likely consist of virtual advocacy efforts. Review NYSFAAA's State Aid proposals and make appropriate changes and/or updates.
- Encourage & support members from each Region of NYSFAAA as well as members of the Government Relations Committee to participate in advocacy with their local elected officials – continuing to raise awareness of NYSFAAA online resources, the Association's community outreach efforts (i.e. FAFSA & TAP Webinar), and to promote support for NYSFAAA's State Aid Proposals.
- Continue to strengthen the function and activity of the Government Relations Committee, working to recruit additional members and to further solidify regular meetings and committee members roles.

## **Membership Committee**

### **Goals and Objectives for 2021-2022:**

- Update membership application.
- Clean up database (with guidance from MemberClicks on how best to achieve this).
- Encourage membership to review their info at least twice per year to confirm that info is correct.
- Use member testimonials in membership renewal messaging.

## **Novice Training**

### **Goals and Objectives for 2021-2022:**

The goal is to offer Novice 2022 as an in-person event. However, based on the current and on-going COVID-19 situation, it is unknown at this time what the format will be.

## **George Chin Memorial Scholarship Committee**

## **School Outreach and Early Awareness Committee**

### **Goals and Objectives (Long Range Plan):**

- Develop and continue to offer college aid workshops and events to students and their families as well as school counselors- virtual and in person
- Planning on the return of more “in person event”
- Continue to network with communities and their officials to promote FAFSA filing opportunities and look to re-brand our events
- Investigate better uses for technology to further our mission
- Push out more communication to recruit more NYSFAAA members to be involved...(i.e. reach out to campus directors)

## **Statewide Training Committee**

### **Goals and Objectives for 2021-2022:**

- Address the continuous educational needs of our membership with valuable and timely trainings
- Work with other committees to grow our membership
- Continue to grow the committee to increase the knowledge base

## **Technology, Innovation, and Communication Committee**

### **Goals and Objectives for 2021-2022:**

- Determine needs of the membership, to include website training as appropriate
- Continuous updates to BOT knowledge
- Continued support of SWT
- Continued updates to website
- Bring up virtual platform for Conference
- Assist rebooted Diversity & Inclusion Committee, as requested
- Restructuring of TICC committee
- Call for Team of Techies for the Conference
- Continue effort to Increase social media presence and investigate MemberClicks options



## Committee Reports

### 2020 Conference Committee

New York State Financial Aid Administrators Association (NYSFAAA)  
2020 Conference Report

Submitted by Debbie Evans and Jeanne McCarthy  
December 2020

The theme of the conference was Our Future Is Coming into Focus  
2020 has been an unprecedented year given the COVID19 pandemic.

At the June 2020 Executive Council meeting it was decided to move the annual conference to a virtual format. Evans and McCarthy worked with the conference hotel to arrange dates for 2021 and to move the deposit of \$16,450 forward. Evans and McCarthy met with Hilton hotel on 11/13/2020 to ask for deposits for June 2021 EC meeting (\$2500) and October 2021 conference to be returned as we don't think we will be able to hold in person meetings or an in person conference in 2021. Hotel contact will let us know outcome of request in January 2021.

The 2020 conference took place in one day on October 28 via go to webinar. The conference was free to all paid members. The number of registrants was 478 with 424 in attendance resulting in an 89% conversion rate.

The agenda follows:

9:00 AM	Opening Remarks Conference Chair(s) Jeanne McCarthy & Debbie Evans
9:15 AM	President Howard Leslie
9:30 AM	Transition of Presidents Adrienne King
10:00 AM	New York State updates (HESC and NYSED) HESC staff and Christopher Fernando
11:00 AM	Break Coffee! I need Coffee!
11:15 AM	EASFAA President Shawn Morrissey
11:30 AM	Business Meeting Adrienne King & Exec Council
12:00 PM	Lunch SOOOO HUNGRY!
1:00 PM	NASFAA Update Justin Draeger
2:00 PM	Scholarships Crystal Krudis & Janice Hilbrink
2:15 PM	Break Something sweet?
2:30 PM	Awards Rob Zasso & Dan Robinson
3:00 PM	Federal Update Move Nautochia Webb
4:00 PM	Raffles Crystal Krudis & Debbie Evans
4:30 PM	Closing remarks & invitation to conference 2021 Jeanne McCarthy & Debbie Evans

Business Partners

Chair – Chris Earnshaw

As we transitioned the annual conference to a one-day virtual conference, opportunities for business partners became limited. As such, we asked business partners who were able to do so to submit a donation to the George Chin Memorial Scholarship Fund. This scholarship program provides critical

assistance to high-performing students of need throughout New York State. In exchange for their donation, NYSFAAA posted the business partner's company logo and link to the conference mini site increasing exposure for that business partner. A slide show of business partners' logos also ran between sessions during the conference. Business partners were solicited several times over the preceding months leading up to the virtual conference. In all, requests were sent to 41 business partners and 19 business partners were able to contribute, resulting in \$7,150 in donations to the George Chin Memorial Scholarship Fund.

#### Publicity

##### Publicity Committee Final Report

Chairs: Stephanie Stock and Tanya Patterson-Stanley

##### Summary of Activities:

Theme: "NYSFAAA: Our Future is Coming Into Focus" was selected as the conference theme.

Teaser Gift: At the 2019 conference in Albany, a placard was placed at attendees' tables for the banquet dinner informing them that in lieu of a give-away, the conference committee made a donation to the George Chin Scholarship Fund. Because there was no income against which to charge a donation from the Conference, no donation was made to the fund.

Conference Mini-Site: The conference mini site was launched on February 19, 2020. It was updated with access to all the required links. Call for session proposals, hotel information (name, address, conference room rate) , registration (i.e., rates), travel logistics (airport, train, & car directions), exhibitor information and a general mention of the NYSFAAA app and what to bring to the conference went up on the mini-site. On June 30, 2020, it was officially announced that the conference was moving to a virtual event due to the Covid-19 pandemic. As such, the conference mini-site was updated to notify the membership and an email blast was sent to the NYSFAAA listserv stating that the conference would be free to all paid members and listed the general content of the 1 day virtual conference.

Listserv: Emails were sent over the listserv to promote the conference emphasizing that it was a free event to paid members. Emails were sent once per month during the summer and early fall due to the high volume of other email traffic on the listserv (emails went out on 7/22/20, 8/27/20, and 9/24/20).

Emails were then sent on a weekly basis in October leading up to the conference. These emails included promotion the 50/50 raffle and the regional "basket" raffle to raise money for the scholarship fund.

#### Resources:

NYSFAAA YouTube, Facebook, and Twitter Contact: Lea Nuwer – nicholla@buffalostate.edu

#### Recommendations:

- Engage social media
- Create videos to promote key sessions and pre-conference workshops
- As the conference is approaching, send at least one email per week.
- Access should be given to the Publicity chair to allow him/her to be able to format the emails in MemberClicks such that it is possible to change font size, color, and general formatting (e.g. bullet points, anchor text for links, etc.)

- Coordinate any email messaging that is going out to the general listserv with the various subcommittee chairs so that timing of messages makes sense and there isn't a deluge of emails with competing messages.

#### Fundraising for the NYSFAAA George Chin Scholarship Fund

Chairs: Crystal Krudis and Janice Hilbrink

##### Activities:

Moving to the virtual platform for the conference presented challenges for the committee as the historic format of raffle baskets provided by the regions was unworkable.

The committee proposed the following:

1. The NYSFAAA website was enhanced to open a platform for individuals to make donations to the scholarship fund. It was suggested to the membership that, in the event that a member passed away, a donation could be made in their memory, which would be in recognition of NYSFAAA's goal of providing support to students in New York State. This appears to have been accepted by the membership as there were many donations made, totaling \$2,423.
2. Since there was no "vendor" area where our Business Partners have traditionally paid to have a space where they could meet with members, a recommendation was made to solicit donations to the scholarship fund (which is allowable under the SLATE Act). The donation allowed the corporations to provide a logo with a link to the company websites which were displayed both before and during the conference. The website enhancement was expanded to allow for these donations with a recommended minimum donation of \$300. Twenty-one corporations participated with donations totaling \$7,150.
3. For members to participate in the fundraising process as they would at an in-person conference, the committee proposed a virtual raffle and virtual 50/50. Each region was asked to provide either gift cards or virtual gift cards for the raffle. These prizes ranged from \$50 to \$250 and tickets were sold through the website with all purchases made by credit card with the funds going directly into the scholarship account. There were 99 participants in the raffles and the income totaled \$1,880. The virtual 50/50 was handled in the same way. There were 81 participants and the income totaled \$1,585 with \$792 going to the winner and \$793 going to the scholarship fund.

The total income for the 2020-2021 year going to the NYSFAAA GEORGE CHIN SCHOLARSHIP FUND is \$12,291.

#### Survey Results and Recommendations for 2021

Hold conference in October one day a week for 3 weeks

Have breakout sessions

No vending for business partners

Continue fundraising for scholarship

## Graduate Professional Concerns Committee

### Committee Members:

**Chair:** Darrin Rooker, Northeast College of Health Sciences  
Margaret Christian, University of Rochester School of Medicine & Dentistry  
Kristin A. Shea, Syracuse University College of Law  
Tanya Patterson-Stanley, MPA, NYIT College of Osteopathic Medicine

### Summary of Activities for 2020-2021:

- Advised NYSFAAA leadership on issues related to graduate and professional schools and/or students
- Drafted and cosigned a letter of support sent to Congressional leaders on the bill H.R. 4631 “Protecting Our Students by Terminating Graduate Rates that Add to Debt (POST GRAD) Act”. This legislation would allow graduate and first professional degree program students the ability to access Federal Direct Loan funds with more favorable borrowing terms.

### Goals and Objectives for 2021-2022:

- Continue to inform and advise NYSFAAA leadership
- Develop and offer training at the 2022 NYSFAAA conference

**Future Meetings and Events:** As needed.

**Submitted By:** Darrin Rooker

**Date:** October 15, 2021

## Development (Fundraising) Committee

### Committee Members:

Tami Gilbeaux, Inceptia  
Tom Dalton, EdFinancial

### Summary of Activities for 2020-2021:

Reviewed previous Committee efforts including:  
Contacting philanthropic organizations  
NYSFAAA Store

### Goals and Objectives for 2021-2021:

- Offering vendors additional options (additional fee):
  - Webinar to showcase a topic/product/service
  - Conference in a box for virtual attendees
  - Vendor acknowledgement at the Conference
  - Vendor spotlight articles
  - Quarterly advertisement

### Future Meetings and Events:

Follow through w/ Exec Council on new initiatives for Vendor Community

**Submitted By:** Tami Gilbeaux  
**Date:** 10.13.2021

## Diversity, Equity and Inclusion Committee

### **Committee Members:**

Peg Stearns - Syracuse University  
Maximo Flint-Morgan - LeMoyne College  
Andrea Damar - SUNY Maritime College  
Cindy Garvey - St. Thomas Aquinas College  
Melissa Santiago - Monroe Community College Rochester  
Nora Bell-Owens - SUNY Brockport  
Kimberley Willis - SUNY Brockport  
Lyndsay Johnson - Stony Brook University  
Todd Moravec - SUNY Plattsburgh  
Tanya Patterson-Stanley – NYIT College of Osteopathic Medicine

### **Summary of Activities for 2020-2021:**

Construction of the NYSFAAA Diversity and Inclusion statement.  
Research for prospective panel members for the NYSFAAA conference.  
Development of resources for the association

### **Goals and Objectives for 2021-2022:**

Continued development of resources  
Training  
Certification opportunities

### **Future Meetings and Events:**

TBD

**Submitted By:** Tanya Patterson-Stanley

**Date:** October 11, 2021

## Mentor Committee

Tayler Kreutter, chair

**Committee Members:** None right now; all previous members felt they were not able to fully commit to this

### **Summary of Activities for 2020-2021:**

This was a hard year to engage the membership and due to the virtual nature of events; a lot of new members were hesitant to participate.

### **Goals and Objectives for 2021-2022:**

Moving forward into this next year we will look to do a few things.

- 1) I will be reaching out to each Regional Chair and asking for them to nominate someone to serve as a member of this committee so that the work can be divided, and we can reach more new members.
- 2) We will use the Novice list and their regions to send a communication out to them asking to get in touch with us should they have any questions. It will also include a survey that they can list information about themselves, things they want to learn more about in the field, and if they would like to be connected with a mentor.
- 3) I'd like to work closely with the Novice team as this is an imperative part of engaging new members. IF we can make a strong connection at the end of Novice, we will have a higher change of success with retaining their engagement in NYSFAAA as a whole.
- 4) I'd also like to encourage well-established NYSFAAA members to present or find other ways to engage new members.

**Future Meetings and Events:** These will be decided as soon as we have committee members.

**Submitted By:** Tayler Kreutter

**Date:** 9/16/2021

## Elections Committee

### Committee Members

Region 1 - Nicole Griffio, Hilbert College  
Region 2 - B.J. Revill, U of R School of Medicine  
Region 3 - Kevin Shults, Syracuse Univ.  
Region 4 - Brian Smith, SUNY Cobleskill  
Region 5 - Dan Robinson, Pace University  
Region 6 - Michelle Bolton, CUNY School of Medicine  
Region 7 - Gene Rogers, Molloy College  
Region 8 - Carolyn Corcoran, SUNY Potsdam  
Chair – Howard Leslie

This year we had the important task of electing a President and Treasurer (Elect)

Patti Donahue was selected by the committee and ran for President Elect unopposed. There had been a second candidate, but that person decided not to run.

We had two excellent candidates for Treasurer-Elect

Mark Bessette

Taylor Kreutter

Tayler won the election in a very close race.

Both new officers will take their place at the table at the end of the October 2021 conference.

Respectfully submitted

Howard Leslie

## Treasurer; Budget and Investment Committee

**Committee Members:** N/A

### **Summary of Activities for 2020-2021:**

COVID has continued to create an interesting situation for our organization financially. This year's budget creation included conversation and projections of the unknown status of the future and our ability to safely gather in person for meetings and trainings. This has created additional challenges with determining appropriate estimates of number of participants and resulting income/loss. Our expenses over the past year have been significantly less with activity for all events being online. Our accounts continue to be in good health. The Treasurer coordinated with the Past Treasurer and others as appropriate to develop and report on the 2021- 2022 Budget, to provide current information on the overall financial condition and cash flow status of the organization and to review current NYSFAAA investments through virtual meetings. Robert Bell from Morgan Stanley has handled our investment accounts for a very long time and we are grateful for the guidance he provides.

All payments for membership, scholarship donations, and other paid trainings continue to be processed directly by the treasurer. In the past, membership and scholarship donations were processed by the committee chairs. This changed when NYSFAAA transitioned to MemberClicks. This is a significant change in the amount of time it takes the Treasurer to ensure timely recording of payments and accurate financial records.

The return of NOVICE and the addition of the Student Loan Bootcamp Training also increase the activity of the treasurer and income coming into the organization.

### **Goals and Objectives for 2021-2022:**

The primary short term goal is transition out the Past Treasurer and being in the Treasurer-Elect. This process includes the transfer of accounts, administrative accesses as well as banking and credit card authority.

A medium goal is to explore and complete the RFP process for auditing firms. Length of time for audits to be completed as well as cost with the current firm have been discussed on various occasions at Executive Council meetings. A committee will be formed to conduct this research and complete the RFP process.

Finally, requests from our members for an option for electronic payment (ACH/direct deposit) continue to come in. Additional research on how to handle these types of payments needs to happen. At this point, there is not enough information given from the bank to know who the payment is coming from.

### **Future Meetings and Events:**

Past Treasurer Susan Godreau and current Treasurer Shalena Clary will meet to off-board current projects and responsibilities Susan has maintained as Past Treasurer. In addition, remote meetings will begin with current Treasurer and Treasurer-Elect Tayler Kruetter to begin to familiarize Tayler with the duties and responsibilities of the Treasurer-Elect and Treasurer.

**Submitted By:** Shalena Clary, Treasurer

**Date:** September 17,2021

## Governance & Ethics Committee

### Committee Members

Scott Atkinson  
Irv Brodsky  
Kerrie Cooper  
Tom Dalton  
Heather McDonnell  
Darrin Rooker  
Howard Leslie - Chair

There were no activities, concerns, or major changes to policy this year, which resulted in a dormant committee.

Howard Leslie (Past-President) will be providing a session, on FA Ethics, at this year's conference.

Respectfully submitted

Howard Leslie

## Government Relations Committee

### Committee Members:

Christopher E. Barto, LIM College, Chair  
Howard Leslie, NYSFAAA Immediate Past President, Berkeley College  
Clemente (Clem) LaPietra, Monroe College  
Donna Gurnett, Association of Proprietary Colleges (APC)  
Eileen Flood, J.D., St. John's University  
Maria DeInnocentiis, Marymount Manhattan College  
Susan Nesbitt Perez, Commission on Independent Colleges & Universities (CICU)

### Summary of Activities for 2020-2021:

- Participated in convening meeting of the joint NYSACAC & Gates Foundation NY Student Success project in October 2020 along with NYSFAAA President, Adrienne King. This project is working to establish a coalition of NY State organization that would endorse and join together in a collaborative Education Equity Alliance. Unfortunately, the lead sponsoring organization, NYSACAC, has taken an exclusionary and anti-proprietary college position in not allowing "for-profit" colleges to be full members of their association. As such, the Executive Council voted to not endorse or join this Alliance as this position is contrary to NYSFAAA's mission statement.
- Based on the results of the 2018 & 2019 State Aid Advocacy Surveys, prepared and received EC's approval for the NYSFAAA's 2021 State Aid Proposal recommendations:
  1. Support Meaningful TAP Awards for New York State Students
  2. Support Opportunity Programs Serving Our Most Vulnerable Students
  3. Eliminate Dependent vs Independent Student Disparity in Access to TAP Awards
  4. Align NY State to Federal Use of Professional Judgment (PJ)



#### 5. Address Higher Education's COVID-19 Related Budget Issues

- Organized NYSFAAA's first virtual participation in the February 9-10, 2021 Student Aid Alliance Advocacy Days, arranging visits by members of the Executive Council and the Government Relations Committee with key legislators and/or their staff members.
  1. In addition, the GRC sent NYSFAAA State Aid policy recommendations to all members of the NYS Assembly and Senate.
- On February 24, 2021 the GRC presented a NYSFAAA Webinar to the membership on State Aid Advocacy to further encourage outreach to legislators and support for NYSFAAA's policy proposals.
- Built an Advocacy page on the NYSFAAA website in support of NY and Federal calls to action for increased student aid investment.
- In late March 2021, in conjunction with budget negotiations, the Committee sent out a call to action to the NYSFAAA membership in support of the Assembly and Senate proposed FY22 Budget increases to state aid programs.
- After multiple years of continuous support for increases in the maximum TAP Award amounts, the GRC was pleased to report that the NYS legislature passed the first significant increase in TAP funding in 20 years – raising the maximum award by \$500 to \$5,665.
- In March 2021 the GRC conducted a Student Loan Forgiveness Poll of the membership to obtain feedback on NASFAA recommended policy proposals – including NASFAA's support for Doubling Pell Grants. 78 responses were received with many also writing detailed comments.
- In May 2021, the GRC issued a call to action to the membership encouraging federal advocacy outreach to members of Congress in support of doubling Pell Grant awards.
- Based on approval by the EC, in July 2021 the GRC prepared a NYSFAAA statement to the membership formally endorsing NASFAA's "Top 5" Student Aid Policy Recommendations for 2021. This communication was sent to the membership under joint signature from NYSFAAA President, Adrienne King, and GRC Chair, Christopher Barto.
- Continued participation in quarterly NYSFAAA meetings with HESC VP Elsa Magee to assist with communication & collaborations.

#### **Goals and Objectives for 2021-2022:**

- Network with and directly collaborate with EASFAA and NASFAA in their Government Relations outreach efforts. Utilize NASFAA's State Advocacy Toolkit resources.
- Explore networking and collaboration opportunities with other NY State higher education professional associations, such as the NY State Association of College Admission Counseling.
- Continue working to raise NYSFAAA's profile amongst members of the NYS Senate & Assembly who serve on their respective Higher Education Committees – with the ongoing goal of presenting & positioning NYSFAAA as an expert resource and sounding board for proposed student aid legislation.
- Continue to actively monitor proposed and passed NYS and Federal financial aid and higher education legislation (including Reauthorization proposals), with the goal of preparing comments, feedback, and where appropriate letters of support/endorsement of such legislation for approval and dissemination by the Executive Council and NYSFAAA President respectively.
- Organize and lead NYSFAAA's participation in the 2022 Student Aid Alliance Advocacy Program, which will likely consist of virtual advocacy efforts. Review NYSFAAA's State Aid proposals and make appropriate changes and/or updates.
- Encourage & support members from each Region of NYSFAAA as well as members of the Government Relations Committee to participate in advocacy with their local elected officials – continuing to raise awareness of NYSFAAA online resources, the Association's community outreach efforts (i.e. FAFSA & TAP Webinar), and to promote support for NYSFAAA's State Aid Proposals.
- Continue to strengthen the function and activity of the Government Relations Committee, working to recruit additional members and to further solidify regular meetings and committee members roles.

**Future Meetings and Events:**

- Participate in NYSFAAA's virtual 52<sup>nd</sup> Annual Conference on October 26-28, 2021, where the GRC will co-present a joint NYSFAAA/NASFAA session entitled: "Financial Aid Advocacy & You: Getting Started!" with Rachel Gentry, NASFAA's Assistant Director of Federal and State Relations.
- Schedule monthly meetings for November and December 2021 and bi-weekly meetings in January and February 2022. Resume monthly meetings in March 2022.
- 2022 Student Aid Alliance Annual Advocacy Program – tentatively in February 2022.

**Submitted By:** Christopher E. Barto

**Date:** October 19, 2021

## Membership Committee

**Committee Members:**

Lucila A Villaquiran, Chair

Marianne Loper, Region I

Anita Strollo, Region II

Kevin Shults, Region III (has since left NYSFAAA, region III working on replacement)

Stacey Block, Region IV

Joe Weglarz, Region V

Michelle Bolton, Region VI (pinch-hitting in a dual role as Exec Council rep)

Pat Noren, Region VII

Pat Farmer, Region VIII (has since left position; no update on replacement)

**Summary of Activities for 2020-2021:**

We met a couple of times in 2020-21 and discussed concerns mostly related to the shift from ATAC to MemberClicks. This has significantly impacted the committee's freedoms to run reports and complete outreach whenever they needed to. Reports requests now must come through Lucy or Renee. In addition, Committee had concerns about the content of the membership application and using work email as the username.

**Goals and Objectives for 2021-2022:**

1. Update membership application.
2. Clean up database (with guidance from MemberClicks on how best to achieve this).
3. Encourage membership to review their info at least twice per year to confirm that info is correct.
4. Use member testimonials in membership renewal messaging.

**Future Meetings and Events:**

September 2021, November 2021, February 2022, April 2022, June 2022 (subject to change)

**Submitted By:** Renee Swift, First Vice President

**Date:** September 17, 2021

## Novice Training Committee

### **Committee Members:**

Renee Nunziato, Suffolk County Community College (co-chair)  
Lucy Villaquiran, Monroe College (co-chair)  
Scott Atkinson, emeritis SUNY Brockport  
Josie Edwards, Berkeley College  
LaSonya Griggs, Tompkins Cortland Community College  
Howard Leslie, Berkeley College  
Kerry Lubold, SUNY Plattsburgh  
Dan Robinson, Pace University  
Perry Brown, College of Westchester  
Julia DeCecco, Highstreet IT Solutions  
Scott Khare, Marist College  
Courtney Rust, SUNY Canton  
Sean Sherwood, SUNY Binghamton  
Brian Smith, SUNY Cobleskill  
Ray Torres, SUNY Orange  
Rob Zasso, Dutchess Community College  
Vanessa Diaz, Suffolk County Community College

### **Summary of Activities for 2020-2021:**

The 2021 Novice training was conducted virtually via the Whova platform from June 7<sup>th</sup> through June 11<sup>th</sup>, 2021. We had 146 participants that completed the training and earned their completion certificate. Being that the training was virtual, we had more participation from out of state folks than we have in prior years. Non-NY participants included:

- CT – Fairfield University (4)
- MD – College of Southern Maryland (1)
- VA – Stratford University (1)
- TX – Mapping Your Future (1)
- MA – Williams College (1)
- VT – University of Vermont (2)
- NH – The NHHEAF Network (1)

Despite being virtual, the format of the training was similar to the in-person event. Participants were broken into 9 small marvel character themed groups. The participants experienced a large group presentation followed by discussion in their small group. Each day consisted of two large group sessions and two small group sessions. There were two breakout sessions that included Satisfactory Academic Progress and New York State Aid Programs.

The Committee worked very hard to foster networking and interaction amongst the participants. Some interesting statistics from the Whova platform include:

- 182 attendees downloaded the app
- 4,293 messages sent (private and community)
- 42 community board topic posts
- 45 photos taken
- 14 meet-ups created

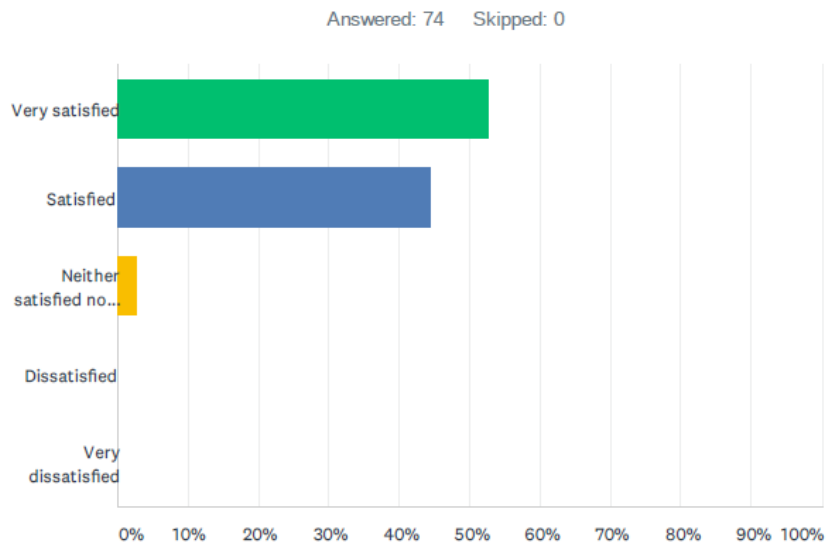
- 124 personalized agendas set up

The committee offered virtual events that included the following:

- Monday – Welcome and Happy Hour
- Tuesday – Trivia
- Wednesday – Karaoke
- Thursday – Happy Hour

The following includes feedback from the post-event survey:

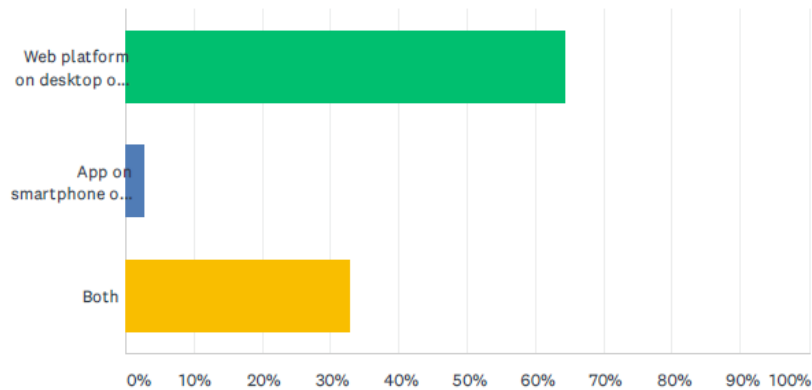
### Q3 How satisfied were you with the virtual event?



ANSWER CHOICES	RESPONSES	
Very satisfied	52.70%	39
Satisfied	44.59%	33
Neither satisfied nor dissatisfied	2.70%	2
Dissatisfied	0.00%	0
Very dissatisfied	0.00%	0
TOTAL		74

## Q4 When accessing Whova, how did you access the platform?

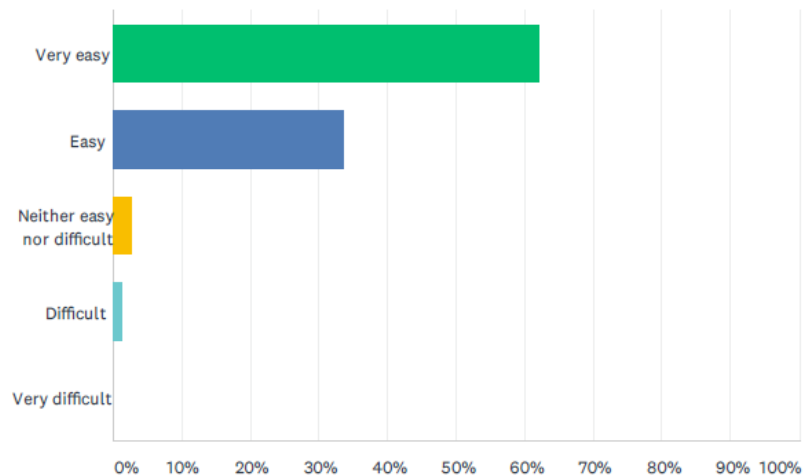
Answered: 73 Skipped: 1



ANSWER CHOICES	RESPONSES	
Web platform on desktop or laptop	64.38%	47
App on smartphone or tablet	2.74%	2
Both	32.88%	24
TOTAL		73

## Q5 How easy was it to navigate the virtual event platform?

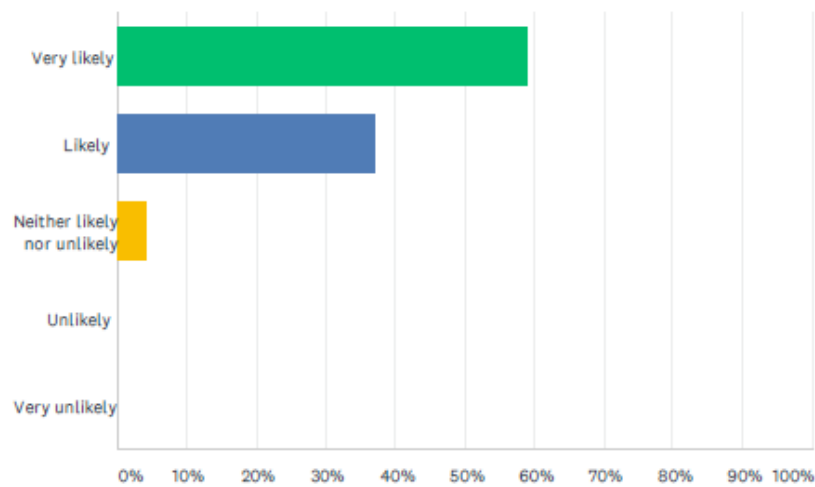
Answered: 74 Skipped: 0



ANSWER CHOICES	RESPONSES	
Very easy	62.16%	46
Easy	33.78%	25
Neither easy nor difficult	2.70%	2
Difficult	1.35%	1
Very difficult	0.00%	0
TOTAL		74

## Q8 How likely are you to recommend this event to a friend or colleague?

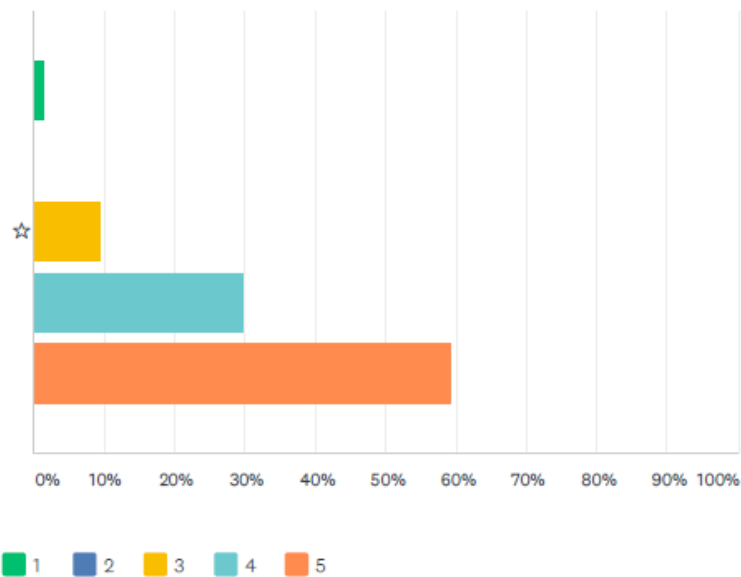
Answered: 73 Skipped: 1



ANSWER CHOICES	RESPONSES	
Very likely	58.90%	43
Likely	36.99%	27
Neither likely nor unlikely	4.11%	3
Unlikely	0.00%	0
Very unlikely	0.00%	0
<b>TOTAL</b>		<b>73</b>

## Q19 Did this event meet your expectations?

Answered: 64 Skipped: 10



	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	1.56%	0.00%	9.38%	29.69%	59.38%	64	4.45
	1	0	6	19	38		

The entire survey is included as a separate attachment to be included in the annual report.

**Goals and Objectives for 2021-2022:**

The goal is to offer Novice 2022 as an in-person event. However, based on the current and on-going COVID-19 situation, it is unknown at this time what the format will be.

**Future Meetings and Events:**

The Novice Committee will resume planning meetings in November. The Committee will review the post-event survey and discuss changes and/or additions for the upcoming year.

**Submitted By:** Renee Nunziato

**Date:** 10/15/2021

## George Chin Memorial Scholarship Committee

**Committee Members:**

Co-Chairs: Crystal Krudis - Region VII; Janice Hilbrink- Region V

Heather Allen; Scott Atkinson (retired) – Region II

Kimberly Radcliff-Loor – Region III

Mary Lou Kutchma – Region V

Theresa Donnell, Erica Follick, Debra Evans (retired) – Region VII

Stacey Hawkins – Region VIII

**Summary of Activities for 2020-2021:**

Applications became available for the 20-21 award year. The committee reviewed all candidates and selected (5) recipients (\$1,500 each). The recipients were announced during the virtual conference in October 2020. Efforts were made to help increase donations (ability to donate online and in memory of), regional gift cards requested for fundraising efforts and raffle tickets were also sold to help with fundraising efforts.

In 2021, preparations began to release the 21-22 scholarship application via email and web release. Once again, the committee members reviewed and selected (5) recipients (\$1,500 each) for the NYSFAAA George Chin Memorial Scholarship. (*October 18, 2021 received all emails from scholarship committee members with their votes for recipients. October 19, 2021, sent tally from all emails of final awardees to committee members.*) Once again, the ability to make online donations were made available with the option to donate in memory of. Regions donated gift cards (to be raffled off) during the 2021 conference. Raffle tickets once again sold to help with fundraising efforts.

**Goals and Objectives for 2021-2022:**

Review the application process and make any adjustments to help streamline the process. Will make recommendations after our peak season, (and after the conference this year) so we can look at everything to confirm what works, what does not, and recommendations for the future.

**Future Meetings and Events:**

Recipients of the scholarship will be announced during the 2021 virtual conference. All recipients will receive a scholarship congratulatory letter shortly. The treasurer will be notified of the recipients so that the checks are issued to each students' school. In addition, the financial aid administrator will receive a letter notifying them that their student is a recipient.

**Submitted By:** Janice Hilbrink, Co-Chair and Crystal Krudis, Co-Chair

**Date:** October 21, 2021

## School Outreach and Early Awareness Committee

### **Committee Membership:**

Gene Rogers  
Amy Thompson  
Patrick Ziegler  
Lisa Simpson

### **Goals and Objectives (Long Range Plan):**

1. Develop and continue to offer college aid workshops and events to students and their families as well as school counselors- virtual and in person
2. Planning on the return of more “in person event”
3. Continue to network with communities and their officials to promote FAFSA filing opportunities and look to re-brand our events
4. Investigate better uses for technology to further our mission
5. Push out more communication to recruit more NYSFAAA members to be involved...(i.e. reach out to campus directors)

### **Summary of Activities:**

#### **FAFSA completion events**

NYSFAAA members participated in a number of virtual FAFSA Completion events that were hosted by HESC during Fall 2020/Spring 2021- using Zoom technology, many of these events allowed NYSFAAA volunteers to assist families complete the FAFSA. HESC hosted events almost monthly, and NYSFAAA targeted a few specific dates to solicit volunteers (11/19/20, 3/30/21 and 4/27/21). NYSFAAA members across the state continued to provide presentations to local high schools populations, be it virtual. HESC continues to host videos and information via their [www.startheregetthere.org](http://www.startheregetthere.org) website and the ability to register for future events.

#### **Guidance Counselor Workshops**

We currently have nothing scheduled. Our plans are to investigate virtual opportunities to offer guidance counselors assistance on aid topics. Members have had early conversations with local high school staff on when in-person events may begin again, and we certainly expect that to happen by Fall 2022.

### **NYGEARUP**

NYSFAAA continues to partner with HESC and the NYGEARUP schools.

### **Upcoming Meetings and Events:**

As a committee, we have monthly phone meetings (every 2<sup>nd</sup> Friday of the month)

### **Recommendations:**

Submitted By Gene Rogers  
Date: 10/12/2021



## Statewide Training Committee

### Committee Members:

Linda Athearn-  
Forster  
Kelly Kelly  
Brian Smith  
Perry Brown  
Hali (Skaggs) Conrad  
Emmett Cooper  
Abby DeCastro  
Maximo Flint-Morgan  
Brian (Calvin) Ghanoo  
Tristia AC. Kayser  
Colleen Russo  
Lynn Sabulski  
Robert Weinerman  
Rockey Weintrob  
Howard Leslie  
Kerrie Cooper

### Summary of Activities for 2020-2021:

#### FALL 2020

November 4 – NYSFAAA/NASFAAA **CREDENTIAL TRAINING**-Verification  
Presenter: Anthony Erwin

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November 13 – Mindfulness in the Workplace  
Presenter: Lucinda Snyder

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November 19 – Verification Training  
Presenter: Joellen Soucier

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December 10 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Direct Loans  
Presenter: Taylor Kreutter

#### SPRING 2021 \*\*Start of using Zoom\*\*

January 22 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Satisfactory Academic Progress  
Presenter: Gena Boling

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February 10 – Federal Update  
Presenter: Tom Netting

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February 12 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Student Eligibility

(moved from February 5<sup>th</sup>)  
Presenter: Nicholas Prewett

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February 16 – Introduction to the 2020 Tax Forms and Tax Changes  
Presenter: Robert Weinerman

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February 24 – Student Advocacy Webinar  
Presenter: NYSFAAA Government Relations Committee (GRC)

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March 19 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Professional Judgment  
Presenter: Deirdre Strutz

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March 26 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Return of Title IV Funds  
Presenter: Courtney Rust

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April 1 – HEERF Round Table Discussion  
Presenter: Anna Kopit, Todd Moravec, Sonya Stein

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April 9 – NYSFAAA/NASFAA **CREDETIAL TRAINING**-Need Analysis  
Presenter: Danielle Emeny

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April 23 – Inside the Beltway Update with Justin Draeger (event with SUNYFAP)  
Presenter: Justin Draeger

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April 26 – HEERF Audit Webinar  
Presenter: Patricia McGowan, Jason Mintz, Allison Guttenplan

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April 30 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Campus Based Programs  
Presenter: Kerry Lubold, Todd Moravec

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May 7 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Packaging and Aid Notification  
Presenter: Raymond Torres

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May 13 – Changes to SAP and R2T4  
Presenter: Howard Leslie

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**SUMMER 2021**

June 1 – NYSFAAA/NASFAA **CREDENTIAL TRAINING**-Cost of Attendance  
Presenter: Kerrie Cooper

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June 3 – TAP Training with HESC  
Presenter: Mike Turner

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June 7-11 – NOVICE training

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June 16 – Scaling Student Success Through AI Technology & Innovation

Presenter: Shannon Sheaff, Mary Austin, Michelle Campbell

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July 13 – Webinar prior to Boot Camp

Presenter: Betsy Mayotte

Moderator: Howard Leslie / Q&A: Robert Weinerman

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July 22 – Boot Camp

July 29 – Boot Camp

August 5 – Boot Camp

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**Goals and Objectives for 2021-2022:**

1. Address the continuous educational needs of our membership with valuable and timely trainings
2. Work with other committees to grow our membership
3. Continue to grow the committee to increase the knowledge base

**Future Meetings and Events:**

September 21 – Having Fun with Taxes-part 1

Presenter: Robert Weinerman

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October 8 – 2022-2023 FAFSA and TAP Application Training Annual Community Webinar

Presenter: LaSonya Griggs & Michael Turner

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October 26-28 – NYSFAAA Virtual Conference

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November 11 or 12 – Regional Meeting **NEED TOPIC**

Presenter: Round Table

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November 16 – Having Fun with Taxes-part 2

Presenter: Robert Weinerman

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November **WAITING ON DATE** – Verification 2022/2023

Presenter: JoEllen Soucier

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**Submitted By:** Linda Athearn-Forster & Kelly Kelly – Statewide Training Co-Chairs

Brian Smith – Second Vice President

**Date:** October 10, 2021

# Technology, Innovation, and Communication Committee

**Committee Members:** Andrea Damar, Calette Fagan-Murdock, Tristia Kayser, Howard Leslie, Lea Nuwer, Joli Patel, Tanya Patterson-Stanley, Sean Sherwood, Brian Smith, Sonya Stein, and Deidre Strutz

## **Summary of Activities for 2020-2021:**

- Supported SWT with surveying and website postings
- Ongoing Website maintenance
- Researched platforms for virtual Conference and Novice
- Build-out Whova platform
- Developing a social media communication plan and calendar
- Ballot creation/deletion
- Membership invoicing
- Conference support with Whova and Zoom
- Recruitment of new members
- Social media survey
- Boot Camp Survey
- GRC Survey
- NYSFAAA/NASFAA Survey
- Communications Support for EC Members, Committee Chairs and Regions
- Investigation of cloud service for conference
- Investigation of data exchange service for conference
- BOT Maintenance
- Respond to AskRory emails

## **Goals and Objectives for 2021-2022:**

- Determine needs of the membership, to include website training as appropriate
- Continuous updates to BOT knowledge
- Continued support of SWT
- Continued updates to website
- Bring up virtual platform for Conference
- Assist rebooted Diversity & Inclusion Committee, as requested
- Restructuring of TICC committee
- Call for Team of Techies for the Conference
- Continue effort to Increase social media presence and investigate MemberClicks options

## **Future Meetings and Events:**

9/23/21

**Submitted By:** Lea Nuwer & Howard Leslie

## Regional Reports

### Region 1 Report

# Region 1 Annual Report 2021-2022

#### 1. Meetings held this year

November 12, 2020 Virtual Meeting

Attendees: 24

Topics and Training details: Presentation from NYSFAAA's new President, Adrienne King. Executive Council report, and NYSHESC report. Discussion of virtual conference.

Date and Location: 2/11/21 held virtually on Zoom

Attendees: 25

Topics and Training details: Executive Counsel Report, discussion on sharing CARES applications, and a presentation by Special Agents Brian Murphy and Howard Nance from US DOE Office of Inspector General, Investigation Services.

Date and Location: 3/18/21 held virtually on Zoom

Attendees: 23

Topics and Training details: HESC Update, Administrative Forbearance, CARES Act, and Default Rate presentation by Tom Dalton, and a Roundtable discussion about HEERF.

Date and Location: 5/6/21 held virtually on Zoom

Attendees: 16

Topics and Training details: HESC Update with Mike Turner, Executive Council Report, discussions on COVID recovery funds and the change to SAI.

2. Other training events that Region was involved in: none

3. Treasury update: \$3829.84

4. Committee reports: none

5. Conference news (if your Region is involved in Conference planning) none

6. Upcoming meetings and events: TBD, after Executive Council meetings and as needed

7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council): Would like to start having hybrid meetings

**SUBMITTED BY:** Lea Nuwer

**DATE:** 8/27/2021

# Region 2 Annual Report 2020-2021

### 1. Meetings held this year

Date and Location: May 21, 2021 – Virtual Meeting

Attendees: 20-ish

Topics and Training details: Round Table Discussion including the following Topics:

- HEERF spending
- FAFSA Completion
- TAP/Excelsior COVID Flag processing
- Conference 2023 in Region 2? Distinct possibility. Will start the exploratory process in the fall.

Date and Location: March 12, 2021 – Virtual (Joint meeting with Region 3)

Attendees: Approximately 40 (between both Regions)

Topics and Training details: "Identifying Inequity from a Financial Aid Lens" Workshop

Herb Alexander, Chief Diversity Officer at Roberts Wesleyan College

Date and Location: February 19, 2021 - Virtual

Attendees: ?

Topics and Training details: Standard Business meeting a HESC Update, and Round Table Discussions

Date and Location: October 9, 2020 - Virtual

Attendees: Approximately 35

Topics and Training details: Standard Business meeting a HESC Update, and new regional officers.

### 2. Other training events that Region was involved in:

FAFSA-thon:

From Renee Swift - For comparison, our regional FAFSA Fests/FAFSAthons decreased from 2019 compared to 2020 in terms of percentage of FAFSAs filed: 51.24% (2019) to 39.06% (2020). This can be explained mostly by COVID in that our events were held virtually.

In 2020-2021, we held three FAFSAthons monthly in November, December and January. These were 12-hour virtual events held on Saturdays.

3. Treasury update: *Account balance: \$7,092.41.*

4. Committee reports: N/A

5. Conference news (if your Region is involved in Conference planning): Region 2 is considering putting in a bid for the 2023 conference.

6. Upcoming meetings and events: October Meeting - TBD

7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council): N/A

SUBMITTED BY: BJ Revill

DATE: 9/15/21

# Region 3 Annual Report 2020-2021

### 1. Meetings held this year

Date and Location: 10/30 (remote)

Attendees - 22

Topics and Training details:

Recap and discussion of Virtual NYSFAAA Conference, announcement of the Region 3 award recipients, Max has NYSFAAA pins if anyone wants them, discussed training to be offered at next meeting in December.

Date and Location: 12/9 (remote)

Attendees – 34

Topics and Training details:

Custody v. Guardianship v. Ward of the Court v Dependency Overrides; Regional meeting followed.

Regional business/questions:

- How should we be managing our Region's membership, which is down by 79 compared to last year? Is there outreach already planned or should this be done by the Region?
- Can we offer a membership discount for say, X amount of webinars, or just training? Need other options during COVID and school budget cuts. A few members are reporting that they have to pay membership costs on their own.
- We'd like to offer scholarships for Region 3 members that will be attending Novice this year, but need to know the costs before we can make any final decisions. We usually have 10-15 in our region that attend.

Date and Location: 1/14/21 (remote)

Attendees – 23

Topics and Training details: EC update, membership, Regional scholarships, and the following:

- Request from membership chair for access to download membership data/reports via the website. It was believed this would be temporary when the new website came up, but it's still not working.
- Request that we revisit Institutional Membership (like EASFAA did) vs Individual to help increase membership. Might be easier to sell during a time of budget constraints.

Date and Location: 3/12 (remote)



Attendees: For training (joint with Rochester Region) 40; for the business meeting 13

Topics and training: Novice Scholarships discussion, allow for 10 recipients to be paid for in full for virtual novice, discussion on institutional membership and impact on revenue. Discussion about Facebook being a place for discussion of financial aid ideas. Member Clicks format, and CARES funding/CRRSAAA topic of interest.

2. Other training events that Region was involved in:

October 18, NYC iSchool, Rocky Weintrob will present at a virtual workshop to instruct families through the process of their FAFSA application, provide tips and tricks, answer FAQ and have a portion for Q+A.

November 14, FAFSA completion event, LaSonya Griggs

November 19, FAFSA completion event, LaSonya Griggs

December 9, FAFSA completion event, LaSonya Griggs

December 15, FAFSA completion event, LaSonya Griggs

June 23; NYC iSchool, LaSonya Griggs presented to juniors and their parents about the college going culture and applying for financial aid.

3. Treasury update:

Provided by Cynthia Roach, the current balance is \$6,631.

4. Committee reports:

Nancy Teodecki and Darrin Rooker led a committee to facilitate the confirmation of regional officers to serve our region for the next two years. In June a solicitation for candidates was sent to region members. The following individuals stepped forward and have committed to serve in their respective offices as follows:

Regional Chairperson: Maximo Flint-Morgan

Secretary: Janet Ippolito Lafata

Treasurer: Cynthia Roach

Executive Council Rep: Margaret (Peg) Stearns

Note: Maximo is also interim Membership representative for Region 3.

5. Conference news (if Region is involved in Conference planning): N/A

6. Upcoming meetings and events:

Remote Region 3 meeting in September, TBD.

10/18 – LaSonya Griggs to help with 2022-23 FAFSA event.

7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council):

A complete review of the webpage is needed so that information is up to date, including Regional reps, Council members, Org charts, etc.

SUBMITTED BY: Patricia Donahue

DATE: 9/15/21

## Region 4 Report

# Region IV Annual Report 2020-2021

### 1. Meetings held this year

Date and Location: 12/9/20, 2/10/2021, and 4/14/21 all held virtually

Attendees: Number ranged from 8 - 16

Topics and Training details: SAP, Status of Loan Forbearance of the CARES Act, and HESC update

### 2. Other training events that Region was involved in: NASFAA and NYSFAA Statewide trainings

### 3. Treasury update: Current balance is \$7,633.81 only activity was purchase of Gift cards for the Conference

### 4. Committee reports: from Stacey Block, Membership committee

Goals for Membership –

- Update the membership application for 2022-23. Our window to do that would be after the first of the year. I can recreate what it looks like now so we can discuss how we want it to look.
- In addition, review our lapsed members. Renee pulled the lapsed members from MemberClicks and have separated them by region. Goal is to “clean up” the database so we engage with those who are still in the business and try to encourage their membership renewal.

### 5. Conference news (if your Region is involved in Conference planning) N/A

### 6. Upcoming meetings and events: None scheduled as of today's date

### 7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council): None

SUBMITTED BY: Rochelle Filler

DATE: 10/13/2021

# Region 05 Annual Report 2020-2021

### 1. Meetings held this year

Date and Location: 11/5/2020, 12/16/2020, 2/10/2021, 8/11/2001 Meetings were held via WebEx.

Attendees 11/5 – 24

12/16- 19

2/10- 16

8/11-9

### Topics and Training details:

11/5 – Panel discussion to gain insight on where colleges are now and how things are going on campuses in the wake of COVID 19.

12/16- Topics included executive council update, FSA discussion, NYS HESC Update, Student Loan Repayment Strategies Panel, and virtual happy hour.

2/10- Presentation by Mariesa-Tillery Ph.D. on financial aid counseling in troubled times. Also, discussion on strategies to assist your students during the unprecedented time of unrest while managing personal needs and responsibilities. The meeting also included NYSFAA updates.

8/11- Discussion of schools fall plans for return to office and campus. Presentation by Jada Hebra, SVP of the Diversity and Inclusion office at SNHU. The topic was Promoting Financial Wellness for Diverse Populations.

### 2. Other training events that Region was involved in:

### 3. Treasury update: September 30, 2021 balance - \$ 9438.00

### 4. Committee reports:

### 5. Conference news (if your Region is involved in Conference planning)

Region 5 is planning a recruitment communication during the fall semester. Also, a new treasurer will need to be appointed as Perry Brown will be retiring in the near future.

6. Upcoming meetings and events: Despite our efforts in planning a in person meeting in October, logistics for outside space and finding a speaker has made this difficult. Thus, our next meeting will be in conjunction with the upcoming statewide training in November.

7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council):

SUBMITTED BY: Joe Weglarz

DATE: 9/30/2021

## Region 6 Report

# Region VI Annual Report 2020-2021

1. Meetings held this year No meeting was held this year

Date and Location: N/A

Attendees

Topics and Training details:

2. Other training events that Region was involved in: N/A

3. Treasury update: As of September 30th, \$12,310.

4. Committee reports: N/A

5. Conference news (if your Region is involved in Conference planning) N/A

6. Upcoming meetings and events: To be determined

7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council): N/A

SUBMITTED BY: Michelle Bolton

DATE: October 15, 2021

# Region 7 Annual Report

## 2020-2021

1. Meetings held this year – Due to COVID, Region VII did not have any meeting during the 2020-2021 year

**Date and Location:**

Attendees

Topics and Training details:

2. Other training events that Region was involved in:

3. Treasury update: \$ 4775.26

4. Committee reports:

5. Conference news (if your Region is involved in Conference planning) – Region 7 host the 2021-2022 conference.

6. Upcoming meetings and events:

7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council):

Samantha Silvia from Stony Brook is now the regional Executive Council person. Erica Follick also from Stony Brook will be our Regional Chair.

**SUBMITTED BY:** Clair Jacobi

# Region 8 Annual Report 2020-2021

### 1. Meetings held this year

**Date and Location: December 11, 2020- Virtual**

**Attendees=19**

**Topics and Training details:**

- \*Ben Loya from Earnest provided the region with an update on their current status and available scholarships.
- \*Update from Current NYSFAAA President
- \*Executive Council update
- \*Novice training update
- \*SWT Credentials
- \*Several Region 8 members will be retiring in the coming months so we are look for new members to step up into different roles.
- \*Round table discussion on: NYS Funding status, concerns; Cares reporting; what other institutions do in regards to follow up of paperwork; tracking of COVID related withdrawals

**Date and Location: March 24, 2021- Virtual**

**Attendees=22**

**Topics and Training details**

- \*Discussion with local HS Counselors on the current state of HS, Student needs, and how the Region may be able to assist.
- \*Open positions in the Region. Will need a new Secretary and also we need a Rep for: Exec. Council, Awards, and Mentoring
- \*NASFAA Credentials and the opportunity to participate at a very low cost.
- \* Federal Funding discussion roundtable

### 2. Other training events that Region was involved in: N/A

### 3. Treasury update: \$4004.02 as of 8/31/2021

### 4. Committee reports: Throughout the year multiple reports from in regards to Membership, the TICC committee, SWT, and Novice provided to members.

### 5. Conference news (if your Region is involved in Conference planning)- Conference 2022- High Peaks- Lake Placid.

- \*Outreach to High Peaks to see what accommodations could be made in preparations for either a smaller attendance and/or virtual event if needed. Very willing to work with us at this time.
- \*Co-Chairs will be making a video to be played at the 2021 conference to promote attendance.
- \*Numerous themes and logos have been discussed at this time.

### 6. Upcoming meetings and events: October 7, 2021- Virtual Meeting

7. Regional comments/recommendations (if your Region has pressing issues that needs to be brought to the attention of Executive Council):

**SUBMITTED BY:** Stacey M. Hawkins

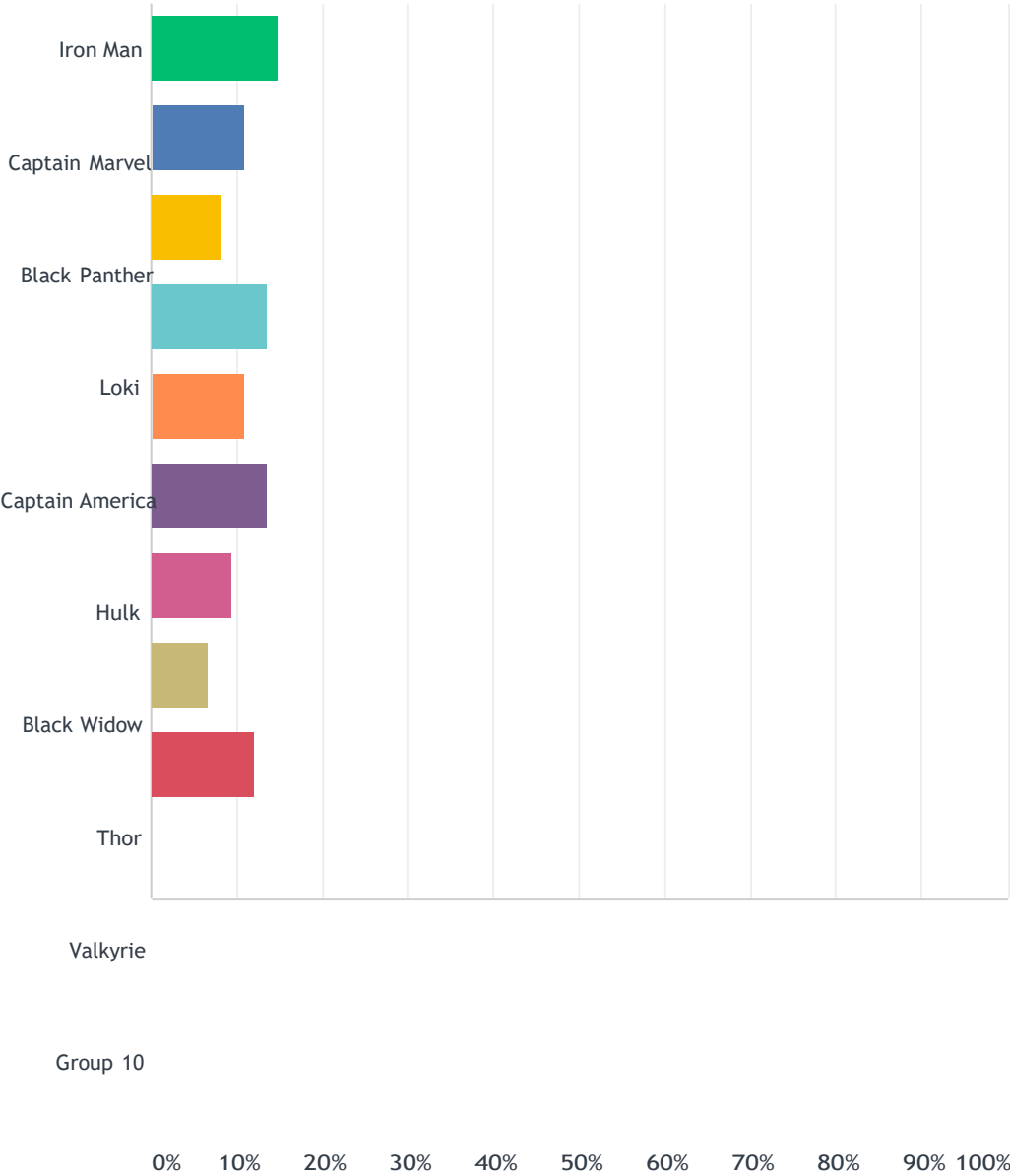
**DATE:** 9/15/2021

Exhibits

Novice Survey Results

Q1 Please check your group name

Answered: 74      Skipped: 0



ANSWER CHOICES	RESPONSES	
Iron Man	14.86%	11
Captain Marvel	10.81%	8
Black Panther	8.11%	6
Loki	13.51%	10
Captain America	10.81%	8



Hulk	13.51%	10
Black Widow	9.46%	7
Thor	6.76%	5
Valkyrie	12.16%	9
Group 10	0.00%	0
Total Respondents: 74		

## Q2 Enter your name and school (optional) Last Name, First Name

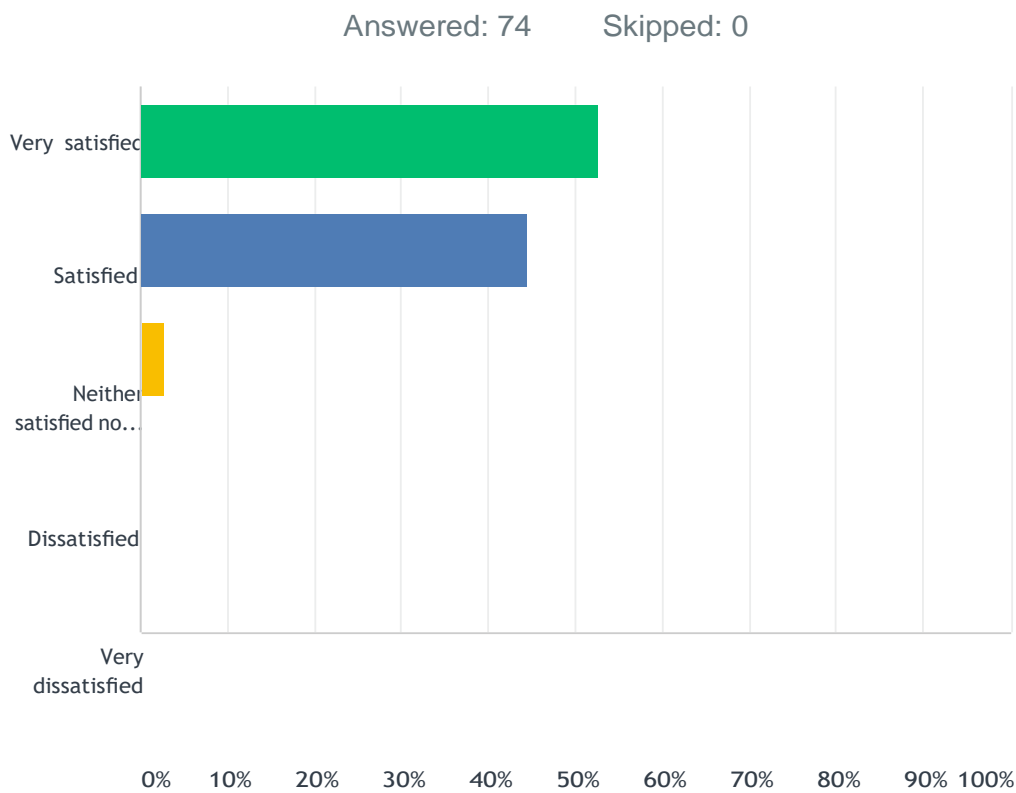
Answered: 59

Skipped: 15

#	RESPONSES	DATE
1	Kerns, Margot (Lisa)	6/30/2021 4:38 PM
2	Ledra, Cindy Vaughn College of Aeronautics	6/29/2021 10:17 AM
3	Fitzgerald, Kathleen The Culinary Institute of America	6/29/2021 9:20 AM
4	Wratten, Kristiann Utica College	6/29/2021 8:25 AM
5	Villanti,Michelle Apex Technical School	6/28/2021 4:20 PM
6	Patti Nocco	6/28/2021 3:43 PM
7	Morales, Valeria The College of Westchester	6/28/2021 2:56 PM
8	Catania, Joey	6/28/2021 12:36 PM
9	Giraldo, Ilona Vaughn College of Aeronautics and Technology	6/25/2021 1:30 PM
10	Mussen, Melissa SUNY Canton	6/22/2021 8:38 AM
11	Vice, Kimberly SUNY Canton	6/21/2021 5:04 PM
12	Wiese, Heather Cornell University	6/21/2021 4:11 PM
13	Potter, Bill - SUNY Orange	6/21/2021 4:11 PM
14	Johnston, Brea A.	6/21/2021 2:27 PM
15	Williams, Staci Genesee Community College	6/21/2021 1:26 PM
16	Tammie Robinson Kingsborough Community College	6/21/2021 12:56 PM
17	Spanierman, Sam (UVM)	6/21/2021 12:22 PM
18	Arias, Claudia. Kingsborough Community College	6/21/2021 11:58 AM
19	Mailloux, Sacha University of Vermont	6/21/2021 9:43 AM
20	Altreche, Irene - Kingsborough Community College - CUNY	6/21/2021 9:10 AM
21	Shatraw, Angela Clarkson University	6/18/2021 10:51 AM
22	Fogarty, Susan -Sallie Mae	6/18/2021 9:22 AM
23	Caitlyn DeMasi / St. Joseph's College	6/18/2021 9:14 AM
24	Kingsborough Community College	6/17/2021 5:15 PM
25	Oropallo, MaryBrooke	6/17/2021 4:45 PM
26	Callaway, Sean Pace Center for Urban Education	6/17/2021 2:57 PM
27	Onondaga Community College, DelFuoco, Matthew	6/17/2021 2:38 PM
28	Ghulsoom Awan Excelsior College	6/17/2021 1:56 PM
29	Nellie Capellan Pace University	6/17/2021 1:16 PM
30	Studer, Brielle	6/17/2021 12:56 PM
31	Gillespie, Mia Bank Street College of Education	6/17/2021 12:38 PM
32	Velazquez, Arlene Baruch College-City University of New York	6/17/2021 12:22 PM
33	Petsching, Anna SUNY Delhi	6/17/2021 11:30 AM

34	Preteroti, Tara- Rochester Institute of Technology	6/17/2021 11:28 AM
35	Melzer, Heidi SUNY Broome Community College	6/17/2021 10:59 AM
36	Bundy, Brittney Daemen College	6/17/2021 10:38 AM
37	Martin, Cassandra St. John Fisher College	6/17/2021 10:37 AM
38	Martin, Alexandra SUNY Potsdam	6/17/2021 10:37 AM
39	Schofield, Emily Fairfield University	6/17/2021 10:36 AM
40	Culinary Institute of America	6/17/2021 10:32 AM
41	Visbeck, Michael SUNY Orange	6/17/2021 10:30 AM
42	Willis, Kimberley	6/17/2021 10:29 AM
43	Conner, Erin - SUNY Potsdam	6/17/2021 10:28 AM
44	Ruiz-Meneses, Katherine	6/17/2021 10:24 AM
45	Fox, Wendy	6/17/2021 10:17 AM
46	Saposnick, Erin	6/17/2021 10:17 AM
47	Roberts, Jennifer Nazareth College	6/17/2021 10:14 AM
48	Paola Santos Baruch College	6/17/2021 10:13 AM
49	Apex Technical School - Jarvis, Sherisa	6/17/2021 10:09 AM
50	Tracy Bocchi-WSWHE BOCES	6/17/2021 10:07 AM
51	Carlton, Audrey- Union College	6/17/2021 10:07 AM
52	Schmidt, Maynard - SUNY Orange	6/17/2021 10:07 AM
53	Campbell, Cheryl SUNY Broome Community College	6/17/2021 10:04 AM
54	Bhakta, Caroline Cornell University	6/17/2021 10:02 AM
55	Cambridge, Taswya	6/17/2021 9:59 AM
56	Ayrassian, Jessica - SUNY Canton	6/17/2021 9:59 AM
57	O'Boyle, Michael, Onondaga Community College	6/17/2021 9:58 AM
58	Driscoll, Alexandria - Russell Sage College	6/17/2021 9:58 AM
59	Korb, Dawn Suffolk County Community College-RIVERHEAD Campus	6/17/2021 9:56 AM

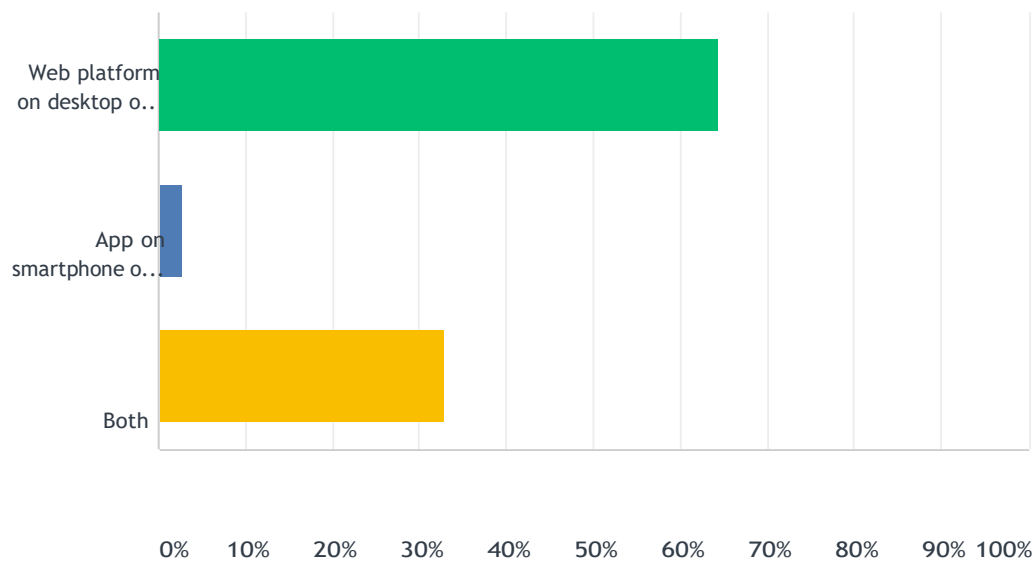
### Q3 How satisfied were you with the virtual event?



ANSWER CHOICES	RESPONSES	
Very satisfied	52.70%	39
Satisfied	44.59%	33
Neither satisfied nor dissatisfied	2.70%	2
Dissatisfied	0.00%	0
Very dissatisfied	0.00%	0
TOTAL		74

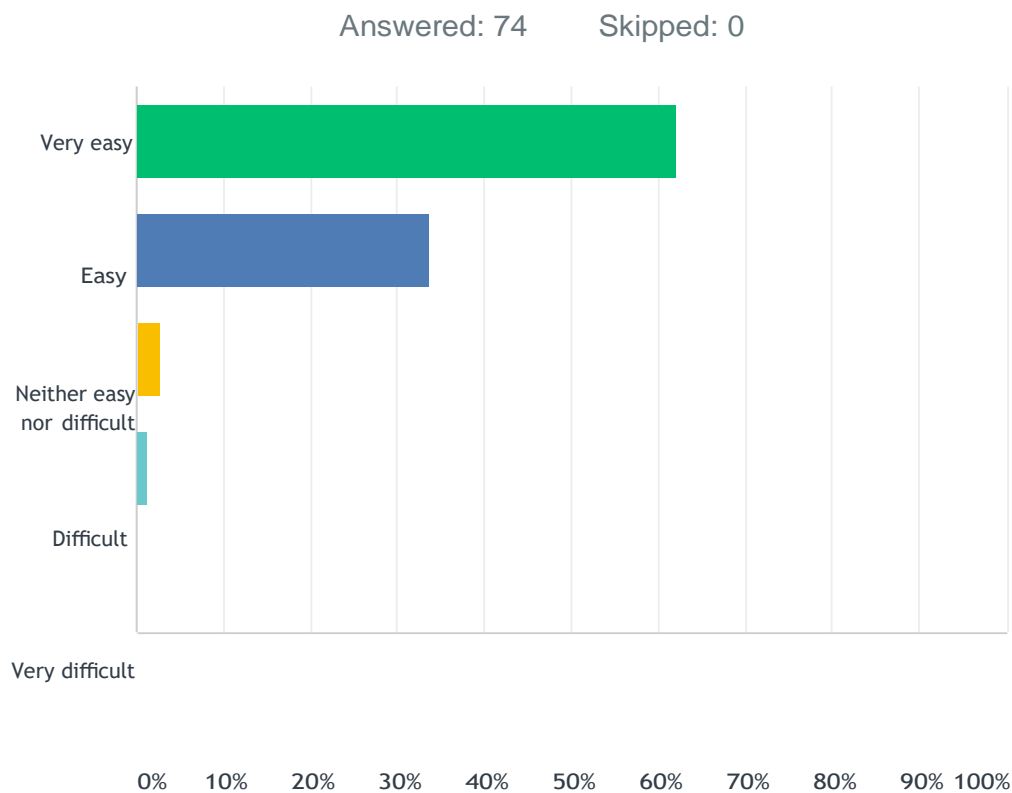
## Q4 When accessing Whova, how did you access the platform?

Answered: 73      Skipped: 1



ANSWER CHOICES		RESPONSES	
Web platform on desktop or laptop		64.38%	47
App on smartphone or tablet		2.74%	2
Both		32.88%	24
TOTAL			73

## Q5 How easy was it to navigate the virtual event platform?



ANSWER CHOICES		RESPONSES	
Very easy		62.16%	46
Easy		33.78%	25
Neither easy nor difficult		2.70%	2
Difficult		1.35%	1
Very difficult		0.00%	0
TOTAL			74

## Q6 How can we improve our next virtual event?

Answered: 51

Skipped: 23

#	RESPONSES	DATE
1	Maybe giving more time between sessions. There were times where a session ran over and it gave no time to take a small break before sessions. Also, there were times we got locked out or booted out of sessions (in my case it was specifically small groups)...not sure if this was a tech issue or something else.	6/29/2021 9:20 AM
2	Trivia events/ quizzes in the small/ large groups	6/29/2021 8:25 AM
3	Clock Hour Examples would be greatly appreciated	6/28/2021 4:20 PM
4	Just a little more of a break between sessions. I felt a little rushed.	6/28/2021 3:43 PM
5	I thought it was very well done. Maybe doing a lunch time activity instead of doing the night events. I think when you are at a conference it is easier to do the nightly events but when you are home its harder to sign back in when you have some time in between	6/28/2021 3:22 PM
6	Make the sessions a bit longer some of them felt a little rushed.	6/24/2021 10:34 AM
7	It would be really helpful to go over examples in the small group sessions as the presentations in the large group sessions are very detailed. We did for some presentations but didn't seem to always have time. Also, would be helpful to be able to answer some questions during the large group presentations.	6/23/2021 10:29 AM
8	N/A	6/22/2021 8:38 AM
9	n/a	6/21/2021 6:28 PM
10	I can't think of anything as there wasn't anything that I did not like about it.	6/21/2021 5:04 PM
11	Trivia during the work day. Karaoke during the work hours. it was great!	6/21/2021 4:11 PM
12	Less time on PowerPoint presentations and more group work in the small group presentations/discussions.	6/21/2021 2:27 PM
13	Notification of all participants should be verified in a sufficient amount of time so the participant clearly understands what to do.	6/21/2021 12:56 PM
14	It was really great, and Brian from Loki was really nice and egaging!	6/21/2021 12:22 PM
15	Anticipate the event by sending emails	6/21/2021 11:58 AM
16	MORE TIME!!!!!!	6/21/2021 9:10 AM
17	In particular, I found the EFC calculation small group session frustrating, as I was on a laptop and could not jump from page to page easy enough to follow along. It could have worked if I was told to print some of the items ahead of time. Otherwise, the training was very good. I feel strongly that this training would be better in person to allow for more easy-flowing question and answer periods, but I enjoyed it as a whole.	6/18/2021 10:51 AM
18	Thought the Virtual Novice Event was outstanding! Brian Smith was excellent!! Didn't care for Howard coming into the small groups, detouring.	6/18/2021 9:42 AM
19	I missed day 1 because I didn't get (or missed) an initial communication with instructions/ link. But once I got that from our group leader it was easy!	6/18/2021 9:22 AM
20	I hope virtual/hybrid events continue to be an option and priority going forward, even once in-person sessions resume again. This event ran pretty smoothly. I would hope this option continues for those who cannot always travel for these types of events.	6/18/2021 9:14 AM
21	Confirming that all attendees receive information prior to the event from the coordinators and small group leaders.	6/17/2021 5:15 PM

22	Continue to have one day that has a choice of sessions to attend, such as on Friday of this year's event.	6/17/2021 4:45 PM
23	No Clue	6/17/2021 2:57 PM
24	N/A	6/17/2021 2:38 PM
25	Remove the "gotcha" questions from the exam :-)	6/17/2021 2:22 PM
26	Take more time to go over slideshow info, it seemed rushed and overwhelming for someone who is new to financial aid.	6/17/2021 1:56 PM
27	I believe that it was so well run I really have no comment. I was very impressed.	6/17/2021 1:16 PM
28	Hopefully the next one can be in person!	6/17/2021 12:56 PM
29	The Novice Training was well organized.	6/17/2021 12:22 PM
30	It would be helpful if we had access to other participants emails. Some of the presenters included contact information in their presentations but not all. And while the participant profiles had a lot of info it didn't include contact information (perhaps this could be something participants add in voluntarily if it can't be done automatically?)	6/17/2021 11:30 AM
31	Virtual is tough, and big props to all who took the endeavor on. I would look for more ways to build connections. Information is good, but knowing connections and resources are priceless.	6/17/2021 11:28 AM
32	Longer breaks between events. Some breaks were only 5 minutes. That's not long enough for a bathroom break and getting coffee, not to mention a brain break. It's a huge amount of information delivered in a very short amount of time. A real break between would help with assimilating the info. Also, the test was purposely difficult with obscure and "trick" questions. Why? Is the intention to make people feel they have less knowledge than they think and undermine their confidence? This is stressful for no reason. A straightforward exam with questions actually ALL based on the information covered would be a more accurate measure of what was learned.	6/17/2021 10:59 AM
33	Somehow making the small groups a bit more interactive or giving the option to record the large group sessions for back reference	6/17/2021 10:37 AM
34	I like the large group sessions, but would enjoy if the small group sessions could have a different content than the large groups. For example, I liked my small group leader, but we would go over the same presentation in small groups for most of the hour that we just heard from the large group.	6/17/2021 10:36 AM
35	incentives and SWAG!	6/17/2021 10:33 AM
36	You did an excellent job, I just wish more people had participated in the fun events, but we will be in-person next year so this is a moot point.	6/17/2021 10:29 AM
37	You did a great job setting up a virtual event, however a in person event would be preferable. Working from home while attending an event made it difficult to really focus and gain the most from the event.	6/17/2021 10:24 AM
38	I think this event was well planned and very informative. I liked the format with large group webinar followed by small group discussion.	6/17/2021 10:17 AM
39	I really can't see where improvement is needed. I was really impressed with the organization and work that was put into NOVICE training.	6/17/2021 10:14 AM
40	Group similar institutions in the same small group. ex. Clock hour schools vs term semesters.	6/17/2021 10:07 AM
41	More time in small group sessions	6/17/2021 10:07 AM
42	Please keep the virtual option even when COVID is over. It is cost effective for universities and for those of us that don't like to travel or can't due to personal responsibilities.	6/17/2021 10:07 AM
43	1. Review the volume of material for each session. Some large group sessions were a good length. Others had a lot of excellent material that was skipped or rushed because there was not ample time. 2. If no questions from the small group, then challenging topics related to the large group discussion should be expanded.	6/17/2021 10:04 AM
44	I thought it was great all round and very engaging. Make sure that pretest questions are up to	6/17/2021 10:02 AM



date (Perkins loan)

45	I would have loved more break out sessions similar to the last day with SAP and NY grants. I really loved Julia as my leader, but I think time would have been better spent in smaller break out sessions to learn about other topics.	6/17/2021 10:01 AM
46	More time for meet and greets or coffee break sessions to meet with others.	6/17/2021 10:01 AM
47	no recommendations	6/17/2021 9:59 AM
48	Everything was user friendly and easy to navigate.	6/17/2021 9:59 AM
49	The interface was a little clunky but otherwise it was good.	6/17/2021 9:58 AM
50	N/A	6/17/2021 9:58 AM
51	In-person (understood under the circumstances it couldn't be this year)	6/17/2021 9:56 AM

## Q7 How did you feel about the schedule for the event? For example, did you like the half day program or would you prefer longer days?

Answered: 70      Skipped: 4

#	RESPONSES	DATE
1	It was okay.	6/30/2021 4:38 PM
2	Half day program was perfect.	6/29/2021 10:17 AM
3	Both formats have their benefits but for a virtual event, half day programs are more doable in my opinion.	6/29/2021 9:20 AM
4	Half day	6/29/2021 8:25 AM
5	The hours were resonable.	6/28/2021 4:20 PM
6	I think the half day sessions were perfect. A full day of zoom may have been tough.	6/28/2021 3:43 PM
7	I thought the half days were good. Its hard to be virtual all day long. I liked that we went from big groups to small	6/28/2021 3:22 PM
8	Liked the half days	6/28/2021 2:56 PM
9	Half day was perfect	6/28/2021 12:36 PM
10	The half day program worked very well.	6/25/2021 1:30 PM
11	The half day program was nice but I don't think it left enough time for the large group and small groups.	6/24/2021 10:34 AM
12	Liked the half day program	6/23/2021 10:29 AM
13	Half Days I prefer	6/22/2021 8:38 AM
14	The 1/2 day schedule worked well for me.	6/21/2021 6:28 PM
15	I loved the half days. It broke up the day with getting NOVICE learning done and tackled some work too!	6/21/2021 5:04 PM
16	I would prefer full days and less of them. It was great!	6/21/2021 4:11 PM
17	Half Days were OK... could have done full days with more detailed content.	6/21/2021 4:11 PM
18	I preferred the half-day program. It gave me more time to think, relax, and study notes from presentations. It allowed more time for communication during our small group gathering and virtual events after hours. Sometimes, less is better because if it was regular longer days, the virtual event would have felt like it dragged.	6/21/2021 2:27 PM
19	I thought the schedule of classes were detailed in the large group but in the small group you almost worked one on one with a person who could answer your questions from the large group session. Each person was knowledgeable in the topics and they had a back up person who helped out to include more details on the questions asked or included examples from work experience. If the team leader was not sure of the correct answer they would make notes and confirm the correct answer with the person who instructed the large group session and address the unanswered question in the next small group. Thanks, I enjoyed this training a lot!!!	6/21/2021 12:56 PM
20	Half day was fine, it's so much info so I feel that stretching it across a week, with half days is more accessible.	6/21/2021 12:22 PM
21	I like the half day program.	6/21/2021 11:58 AM
22	The half day program was great!	6/21/2021 9:43 AM

# NYSFAAA Virtual Novice 2021 Survey

23	Longer days for sure. So much information and PELL alone could take hours	6/21/2021 9:10 AM
24	I thought that it was just right for a virtual event. I would not want to sit and listen for longer than that, unless in person.	6/18/2021 10:51 AM
25	Half day program was perfect!	6/18/2021 9:42 AM
26	Half day was perfect	6/18/2021 9:22 AM
27	I think the half day program worked out well. A longer day stuck in front of a screen for the large and small groups would not have been as worthwhile, in my opinion. The shorter program helped to break up the day and keep me focused and engaged during each session.	6/18/2021 9:14 AM
28	The have day program was great because it allowed me to still get my office work done remote learning for my child.	6/17/2021 5:15 PM
29	I did not mind it but I also worked in my office for the other half of the day so it was sometimes difficult to switch gears between the two. That said, if it was full day sessions, I may not have been able to attend as our office coverage would have been more impacted.	6/17/2021 4:45 PM
30	Yes half days	6/17/2021 2:57 PM
31	I thought the half day program worked great. Very informative but also gave you time in the day to practice some of what was taught.	6/17/2021 2:38 PM
32	It might be better to do fewer, longer days - I had trouble not being able to work with students in the morning for almost an entire week	6/17/2021 2:22 PM
33	longer days to take time discussing info	6/17/2021 1:56 PM
34	half days if virtual for sure! Full days in person for sure!	6/17/2021 1:16 PM
35	I feel like longer days would be better. Presenters seemed to have to rush to fit the presentation into the time frame they were given or cut out portions of their slides.	6/17/2021 12:56 PM
36	1/2 day was perfect	6/17/2021 12:38 PM
37	The half day program worked out for me.	6/17/2021 12:22 PM
38	Great! The half days were awesome and allowed me to still proceed with much of my daily work in the office in the afternoons	6/17/2021 11:30 AM
39	Half days were good, but I might have scheduled it later in the day to bump up to the social events in the evening. That way you may have received more participation.	6/17/2021 11:28 AM
40	For a virtual event, it would make more sense to spread out the events more. When you leave the office to go to an in person event, you can immerse in it and give it your full focus. When it's virtual, you are in the office and there are expectations.	6/17/2021 10:59 AM
41	Half day programs worked well for me because I was in my office working and training at the same time.	6/17/2021 10:38 AM
42	Half day was great especially with it being virtual!	6/17/2021 10:37 AM
43	I think the half days were plenty, especially being virtual!	6/17/2021 10:37 AM
44	I liked the half day program	6/17/2021 10:36 AM
45	I liked the half days	6/17/2021 10:33 AM
46	I think I would have preferred longer days, I feel that the large group sessions were rushed. While the small group was very helpful, a slower pace through the large group presentations would have helped comprehension even more.	6/17/2021 10:32 AM
47	I like half day program. Not overwhelming	6/17/2021 10:32 AM
48	For a virtual setting, I think the half day sessions worked well. This is a relatively busy period in the finaid calendar, so I think a week's worth full day sessions for an event that requires active and prolonged participation without the benefit of in person attendance would be a pretty big ask for individual attendees, and their employers.	6/17/2021 10:30 AM

49	I prefer the half day program as it enabled me to do other work or to review my notes.	6/17/2021 10:29 AM
50	I felt like, even though we only did half days, that the days still seemed long. I attended as an	6/17/2021 10:28 AM

## NYSFAAA Virtual Novice 2021 Survey

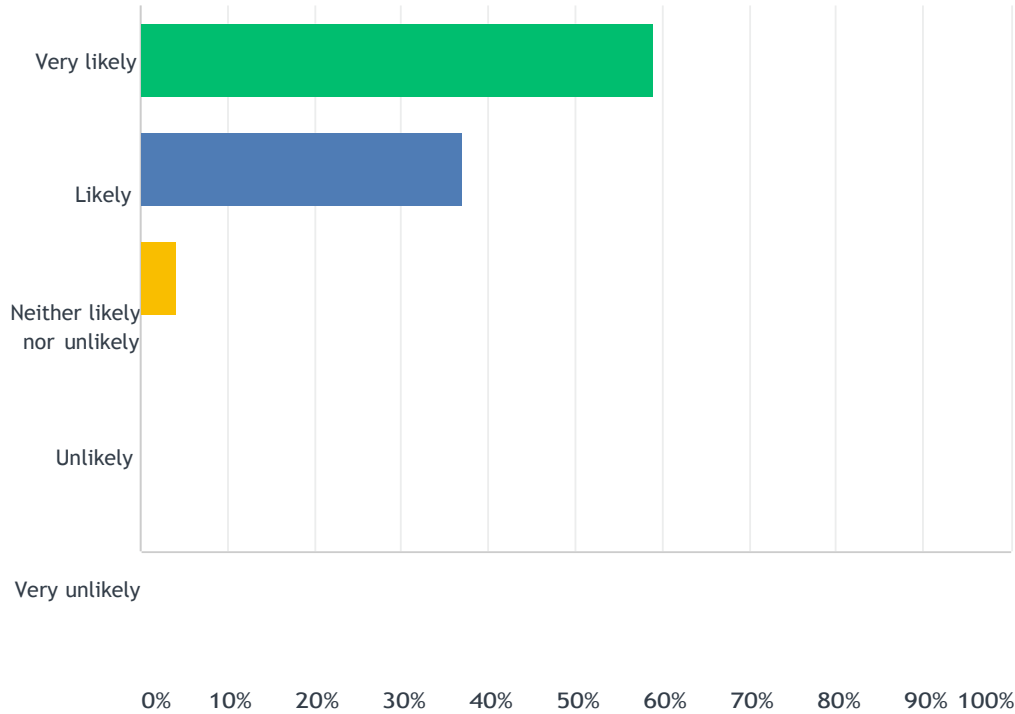
Admissions representative & sometimes would get lost in the weeds with the in depth financial aid information. Perhaps doing something to guide those who are not in financial aid like a group that allows further explanation & maybe a bit more "dumbed down," for lack of a better way to put it. I did take away a lot of good information that I hadn't known previously, but sometimes I just felt I got lost with stuff. Or, maybe having a separate event that focuses more on what Admissions folks should know about financial aid to help their students up to a certain point.

51	Would prefer a whole day at in person. I feel given the circumstances virtual provided the information but I did not gain as much as I would have liked to. Working from home or the office and attending the event was not the best use of the time and required that I multitask on various occasions. I feel separating from the office setting completely to focus on the event would have been a better approach for gaining the most from the event and networking. In the future I'd prefer in person events.	6/17/2021 10:24 AM
52	I think a half day was sufficient,, but I also knew nothing about Financial Aid so I felt a little overwhelmed with all the information.	6/17/2021 10:17 AM
53	The half-day format worked well for me personally, but if you were to switch to longer days maybe only meeting 3 days rather than 5 could be helpful to those having to keep appointments in their FA offices.	6/17/2021 10:17 AM
54	The 1/2 day program was perfect for an on-line setting. It was enough to learn info from the training and was able to complete work in financial aid. Longer days may work if it is in-person.	6/17/2021 10:14 AM
55	I prefer longer days with more content but break for lunch	6/17/2021 10:13 AM
56	Half day program was great!	6/17/2021 10:09 AM
57	I thought the platform was very easy to follow and have to say it was probably the best virtual platform I have used since the pandemic. Half day program is better for me.	6/17/2021 10:07 AM
58	Half day program was great. I think covering more than 2 topics a day could be a bit overwhelming!	6/17/2021 10:07 AM
59	I would have preferred longer days with more options to attend NYS aid/scholarships as that is my job. Federal is good to know, but isn't my focus. The NYS aid training was good, but we ran out of time. He could have been a whole day event. I also didn't feel it was fair that there were a lot of questions on the post test that were not covered.	6/17/2021 10:07 AM
60	Loved the half-day program format	6/17/2021 10:07 AM
61	I liked the half day program. As noted above, some sessions needed to be longer. I am grateful for the handouts as references.	6/17/2021 10:04 AM
62	Half day is fine, with a virtual event our offices still had us working with expectations production wise to meet. It allows us to check morning emails and stay in sync with the office. It is probably allowing more attendees since most schools cannot afford to have multiple people out of production or phone shifts.	6/17/2021 10:02 AM
63	Longer days so we could fit more topics in - breakout sessions about more specific topics instead of the broad topics we had throughout the week.	6/17/2021 10:01 AM
64	My preference would have been for longer days to shorten the span of the event.	6/17/2021 10:01 AM
65	I like the half-day programs but prefer afternoon sessions	6/17/2021 9:59 AM
66	Half day program was great. It is a lot of information throw at you at once so break it down into shorter days allowed for less "burn out"	6/17/2021 9:59 AM
67	I appreciated the half days. Allowed me to complete work in the second half of the day.	6/17/2021 9:58 AM
68	Half day program is good so you can continue to get office work done for the other half of the day	6/17/2021 9:58 AM
69	I liked the half day program but it seemed like the shorter presentations were in the morning and the longer presentation was the later session. For future events maybe consider swapping those.	6/17/2021 9:58 AM
70	Half day was good	6/17/2021 9:56 AM

## Q8 How likely are you to recommend this event to a friend or colleague?

Answered: 73

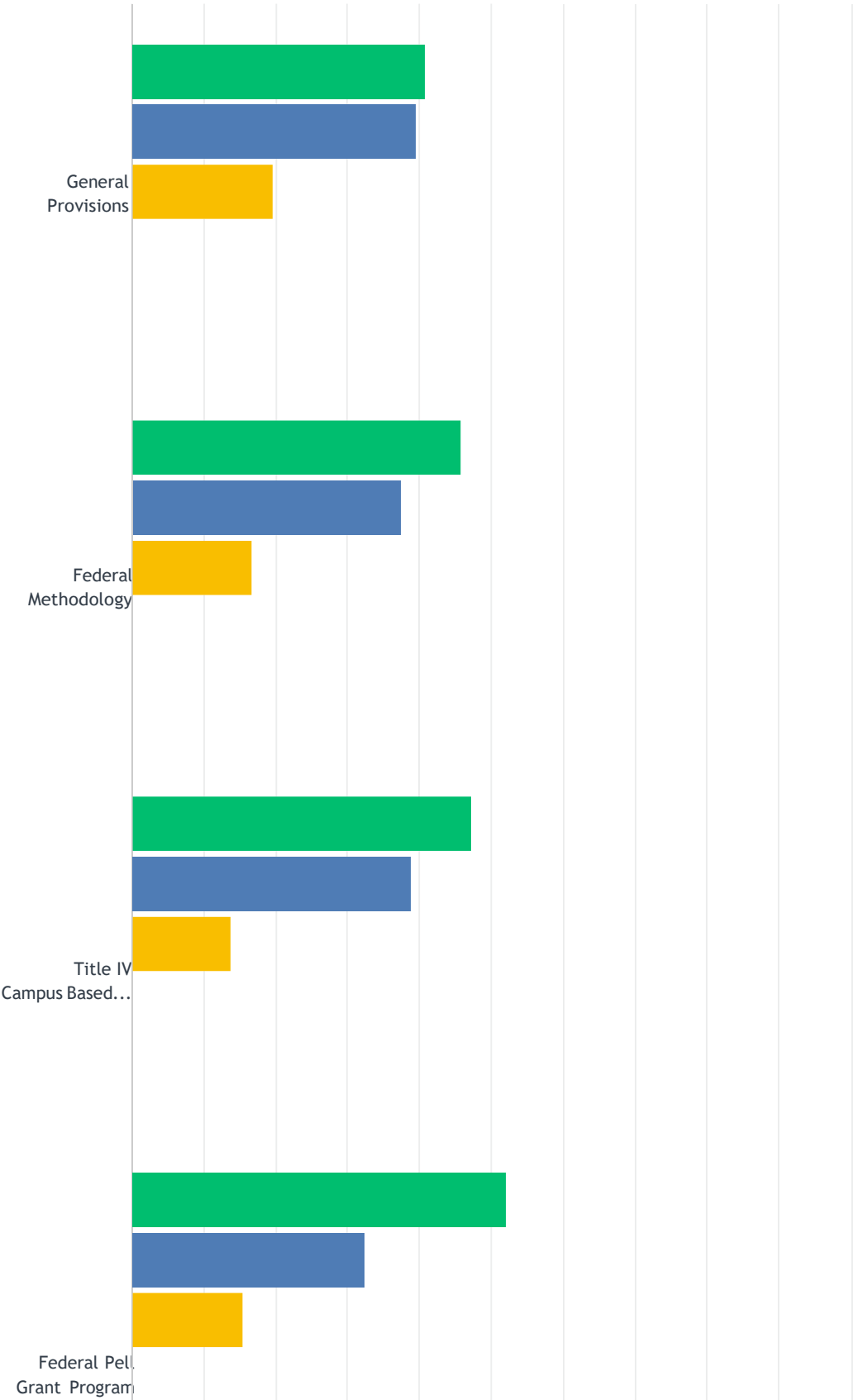
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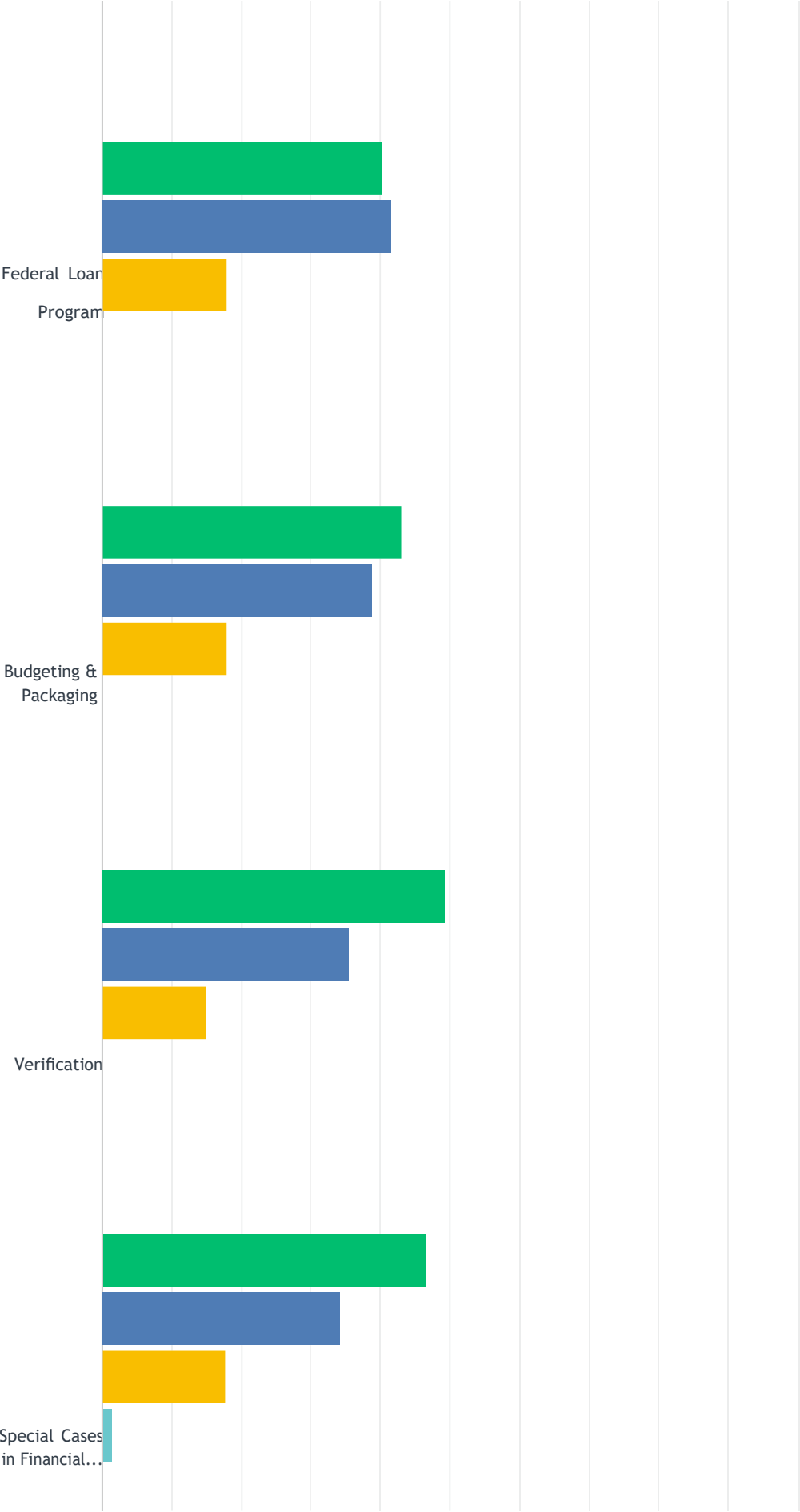


ANSWER CHOICES	RESPONSES	
Very likely	58.90%	43
Likely	36.99%	27
Neither likely nor unlikely	4.11%	3
Unlikely	0.00%	0
Very unlikely	0.00%	0
<b>TOTAL</b>		<b>73</b>

Q9 Please indicate how you rate the following large group sessions:

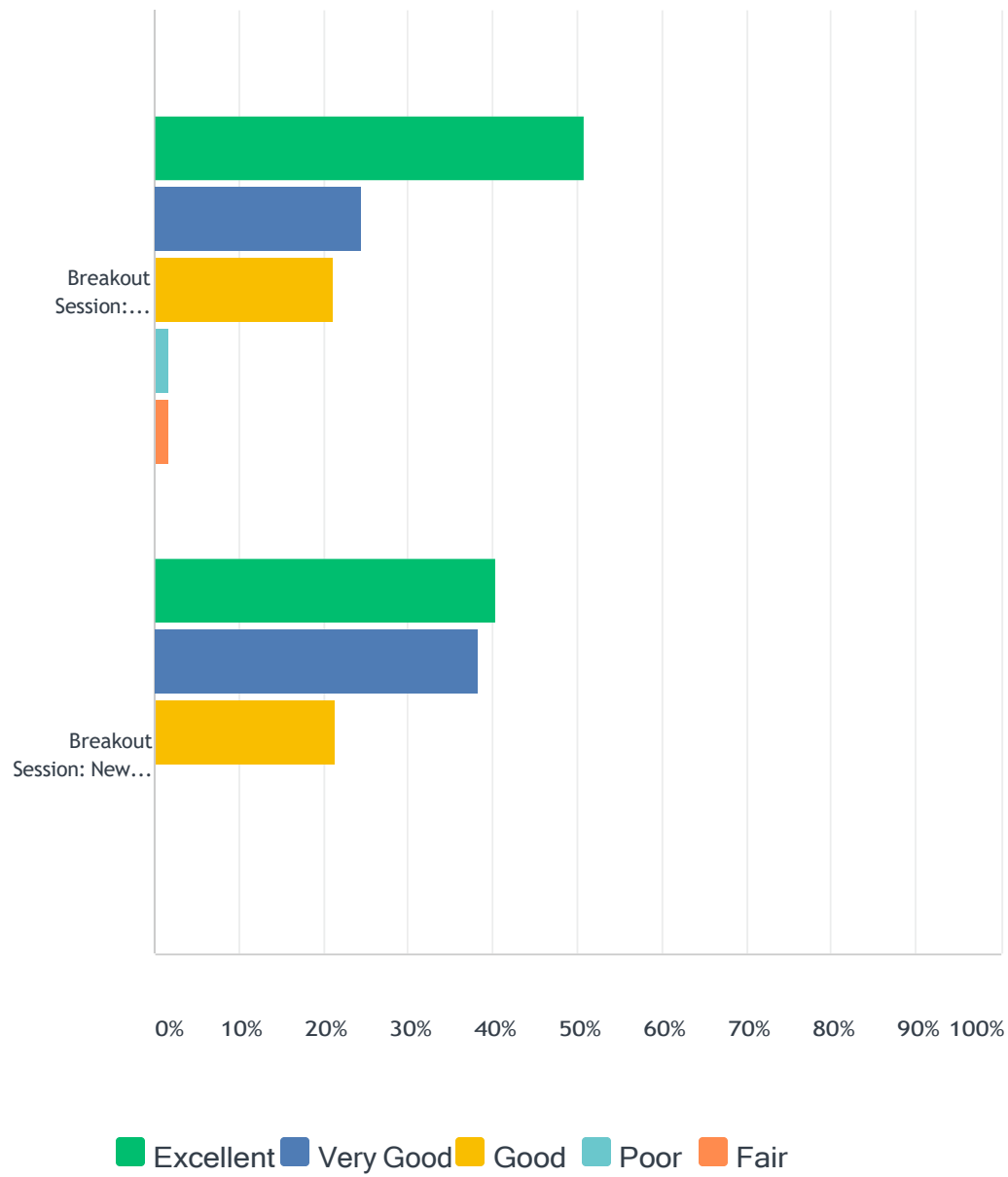
Answered: 73      Skipped: 1







# NYSFAAA Virtual Novice 2021 Survey



# NYSFAAA Virtual Novice 2021 Survey

	EXCELLENT	VERY GOOD	GOOD	POOR	FAIR	TOTAL
General Provisions	40.85% 29	39.44% 28	19.72% 14	0.00% 0	0.00% 0	71
Federal Methodology	45.83% 33	37.50% 27	16.67% 12	0.00% 0	0.00% 0	72
Title IV Campus Based Federal Programs	47.22% 34	38.89% 28	13.89% 10	0.00% 0	0.00% 0	72
Federal Pell Grant Program	52.11% 37	32.39% 23	15.49% 11	0.00% 0	0.00% 0	71
Federal Loan Program	40.28% 29	41.67% 30	18.06% 13	0.00% 0	0.00% 0	72
Budgeting & Packaging	43.06% 31	38.89% 28	18.06% 13	0.00% 0	0.00% 0	72
Verification	49.32% 36	35.62% 26	15.07% 11	0.00% 0	0.00% 0	73
Special Cases in Financial Aid (Professional Judgement)	46.58% 34	34.25% 25	17.81% 13	1.37% 1	0.00% 0	73
Breakout Session: Satisfactory Academic Progress	50.88% 29	24.56% 14	21.05% 12	1.75% 1	1.75% 1	57
Breakout Session: New York State Aid Programs	40.43% 19	38.30% 18	21.28% 10	0.00% 0	0.00% 0	47

#	COMMENTS	DATE
1	I had computer trouble and was not able to enter into the breakout sessions. I was hoping to catch the New York State Aid Programs training.	6/22/2021 8:39 AM
2	I did not attend TAP but got lots of info from others that were able to attend.	6/21/2021 4:13 PM
3	Learning Financial Aid is a very detailed subject to become knowledgeable in and it takes time and experience to learn it. In the large group sessions I feel I got a lot of useful information and powerpoints to help me with my learning.	6/21/2021 1:07 PM
4	MORE TIME. All were great but not enough time. We are newbies and definitely need more time. Full day session instead of half days would have been better	6/21/2021 9:13 AM
5	Would have liked more information on the 'packaging and Budgeting' session. Excellent program!	6/18/2021 9:48 AM
6	The large group sessions were all great! The presenters were all obviously prepared and experienced. My only complaint is that there were a few questions on the final exam that were not covered in the large groups. Since they were not mentioned during these sessions, there were no further questions/comments on these topics that were naturally carried through to the small groups to really get the concepts across. For this reason, I don't think this is a fault of my small group leader, but rather, just a missed opportunity of the large group sessions.	6/18/2021 9:21 AM
7	Any sessions that I did not rate were those I was unable to or did not attend.	6/17/2021 4:50 PM
8	I was not able to attend the NYS or the SAP sessions but I am confident that it was very well presented.	6/17/2021 1:18 PM
9	All sessions were great. I am wondering if there could be a session with a graduate school focus	6/17/2021 12:40 PM
10	Oftentimes there were slides that the presenter would say "no longer applied" so they were skipping them (particularly in regards to perkins) and while that was fine during the presentation, when re-reviewing the slides after the event I found it confusing. It would be helpful if the slides that no longer applied were removed.	6/17/2021 11:32 AM
11	I was not a huge fan of the large group sessions. Did not like that we could not interact. I can	6/17/2021 11:31 AM

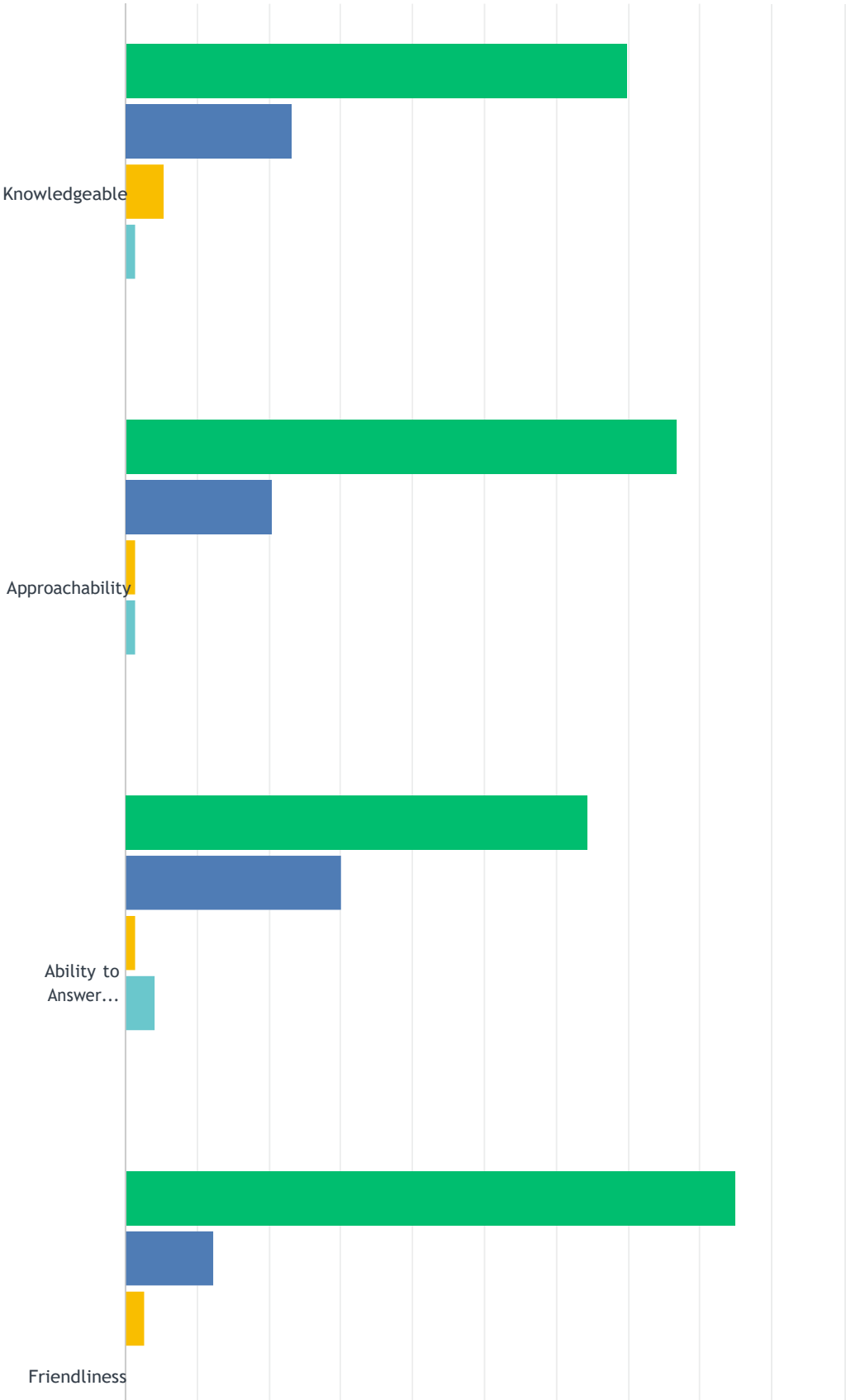
# NYSFAAA Virtual Novice 2021 Survey

read materials on my own.

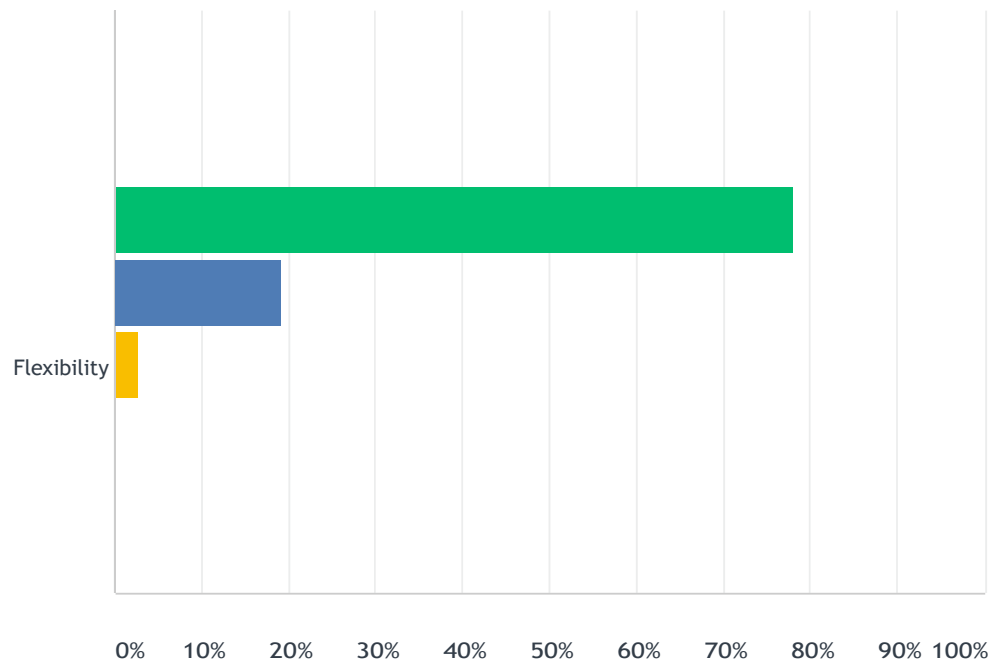
12	I felt like the Campus Based Federal program session focused too much on Perkins.	6/17/2021 10:43 AM
13	I wish I could attend both breakout session.	6/17/2021 10:32 AM
14	Everyone did a great job teaching. It was just a lot of information in a short amount of time.	6/17/2021 10:21 AM
15	Each webinar was very information and packed with great information.	6/17/2021 10:19 AM
16	I did not attend the SAP session	6/17/2021 10:09 AM
17	Did not attend SAP -- it was held at the same time as TAP. I wish more time was scheduled for the NYS TAP presentation. Very good information, but very rushed and we didn't get through it.	6/17/2021 10:02 AM
18	Everyone was fantastic and made the training very fun and worth every second!	6/17/2021 10:01 AM
19	I was not in the NYS Aid Breakout session	6/17/2021 9:59 AM

Q10 Please rate the small group leader on the following:

Answered: 73      Skipped: 1



# NYSFAAA Virtual Novice 2021 Survey



■ Excellent 
 ■ Very Good 
 ■ Good 
 ■ Fair 
 ■ Poor

	EXCELLENT	VERY GOOD	GOOD	FAIR	POOR	TOTAL
Knowledgeable	69.86% 51	23.29% 17	5.48% 4	1.37% 1	0.00% 0	73
Approachability	76.71% 56	20.55% 15	1.37% 1	1.37% 1	0.00% 0	73
Ability to Answer Questions	64.38% 47	30.14% 22	1.37% 1	4.11% 3	0.00% 0	73
Friendliness	84.93% 62	12.33% 9	2.74% 2	0.00% 0	0.00% 0	73
Flexibility	78.08% 57	19.18% 14	2.74% 2	0.00% 0	0.00% 0	73

#	COMMENTS	DATE
1	Brian was great!	6/29/2021 9:23 AM
2	Ray was great. May be helpful to keep answers a little shorter so more questions could be addressed.	6/23/2021 10:32 AM
3	Courtney went above and beyond to make everyone feel comfortable at everything... asking questions, socializing, learning... she is very approachable. I have social anxiety and she is definitely an asset to NOVICE.	6/21/2021 5:11 PM
4	RAY was amazing and really knew his stuff. Not only was very knowledgeable but also gave us great tips and tricks to really improve our knowledge base and make our jobs more efficient.	6/21/2021 4:13 PM
5	I really loved my small group leader. He was very nice and welcoming from the beginning of the training until the very last day. It was an excellent experience. He said it was his first time as a group leader, but I could not tell since he was so friendly and engaging. He always looked so comfortable speaking with us and helping us break out of our silence shells.	6/21/2021 2:29 PM
6	He was so easy to understand and if we had questions he was very knowledgeable	6/21/2021 9:13 AM
7	Great group leader	6/18/2021 10:53 AM

8 Brian Smith was outstanding, knowledgeable and if he had an outstanding question he would  
6/18/2021 9:48 AM

# NYSFAAA Virtual Novice 2021 Survey

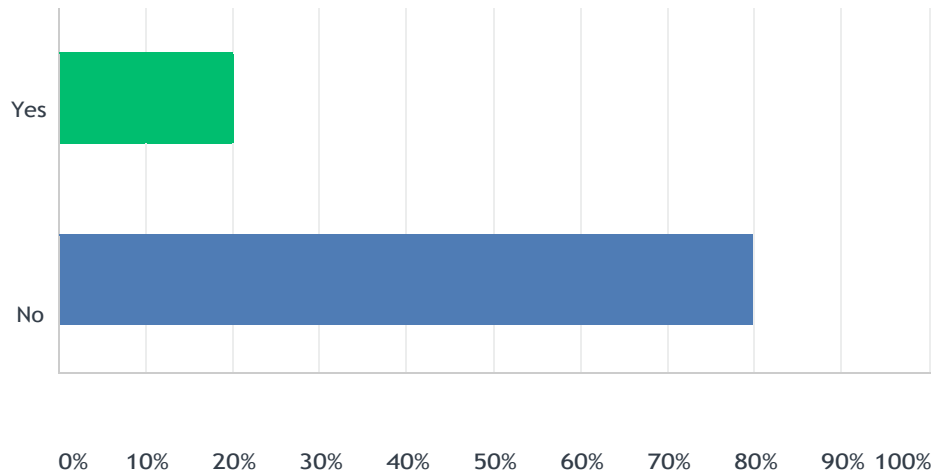
obtain the information and share with the group. So knowledgeable and respectful! Thank you Brian!!

9	Could not have been better.. excellent. Thank you.	6/18/2021 9:23 AM
10	Scott was great! Very knowledgeable and willing to help.	6/18/2021 9:21 AM
11	Courtney was FANTASTIC!!!! So approachable and enthusiastic about the material and the event. She was very encouraging and supportive and if she didn't know an answer (which was nearly never) she got it and reported back.	6/17/2021 4:50 PM
12	I thought that Scott was so warm and welcoming and I hit it off with him almost instantly because he is in Veteran Affairs which I have an affinity for having spent over a decade working in this area. I have so much respect for him and his professional ethics and values. He was extremely knowledgeable and was able to bring a balance to the group that was needed at times. I thought that he made us all feel important and appreciated and addressed everyone with the utmost level of respect and patience.	6/17/2021 1:18 PM
13	Sean was a great group leader! He was really engaging and answered our questions thoroughly!	6/17/2021 12:57 PM
14	Both Vanessa Diaz and Josie Edwards were excellent! They had great knowledge of the sessions being covered, had great communication skills, personable. Each session that we had was very interesting and they were very helpful. Thank you!	6/17/2021 12:30 PM
15	Brian was awesome! Thank you Brian for sharing your time with us and answering our questions.	6/17/2021 11:32 AM
16	I loved Perry's energy and he is very knowledgeable.	6/17/2021 10:31 AM
17	I did not realize that this was Sean's first year as a small group leader. He was very knowledgeable and was very thorough making sure we understood the information for each topic learned in our large group setting. It felt as though Sean was a tenured leader in NOVICE training.	6/17/2021 10:23 AM
18	Brian Smith was a wonderful small group leader! He was able to answer all of our questions and if he was unsure he always consulted with other members to provide the information we asked for. I truly enjoyed learning from him!	6/17/2021 10:19 AM
19	Our leader was enthused and obviously loves financial aid. The first 2 or 3 days, most of our small group time was spent re-reading the handouts. By the end of the week, we had more discussion on trickier topics, and that was great! She gave us some useful files and links that expanded on the large group sessions. I think this was her first time as a leader, and she grew into the role as the week progressed. She made everyone feel welcome and was very approachable.	6/17/2021 10:10 AM
20	Again, would recommend similar schools to be put together in the small groups for better networking and questions pertaining to participants school.	6/17/2021 10:09 AM
21	Ray was great! Eager to help, really emphasized networking and reaching out to one another in the future	6/17/2021 10:09 AM
22	The group leader was fantastic. Engaging and informative throughout the training.	6/17/2021 10:07 AM
23	Courtney was excellent and engaging.	6/17/2021 10:03 AM
24	I wasn't crazy about our group leader. I'm not sure she understood the questions being asked because I don't think she responded appropriately. Her enthusiasm seemed forced and the stock answer to any question was "ask your school."	6/17/2021 10:02 AM
25	Ray was fabulous, a joy really. He brought fun along with learning. He made everyone feel comfortable to talk and ask questions. I am not typically a volunteer to chat as I'd rather sit back and absorb everything but he made me feel comfortable in being able to open up and ask questions.	6/17/2021 10:01 AM

## Q11 Did you participate in the evening activities?

Answered: 73

Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	20.55%	15
No	79.45%	58
TOTAL		73



## Q12 Which evening activities did you find most engaging?

Answered: 14      Skipped: 60

#	RESPONSES	DATE
1	Trivia	6/30/2021 4:46 PM
2	Karaoke was super fun!	6/29/2021 9:29 AM
3	The first night happy hour and the last night event	6/28/2021 3:26 PM
4	The virtual event I felt was most engaging was happy hour. I attended the very last happy hour event on Thursday I believe.	6/21/2021 2:34 PM
5	The final night wrap up party	6/17/2021 5:17 PM
6	Loved Trivia Night-very fun, enjoyed partnering with another participant.	6/17/2021 5:00 PM
7	Trivia	6/17/2021 4:47 PM
8	I only participated in trivia, time constraints wouldn't let me participate in the others.	6/17/2021 2:40 PM
9	I did one of the happy hours and trivia. Both were good.	6/17/2021 11:33 AM
10	The trivia night and karaoke. Our team won trivia night and I was not planning on singing because I am tone deaf, but Ray pulled me out of my comfort zone and I sang anyways. Sorry to the rest of the participants!	6/17/2021 10:47 AM
11	The happy hours were very nice for being virtual	6/17/2021 10:39 AM
12	Karaoke was a blast!	6/17/2021 10:34 AM
13	Trivia	6/17/2021 10:08 AM
14	I only participated in the last happy hour, and I really enjoyed it!	6/17/2021 10:04 AM

## Q13 Why didn't you participate in evening activities (timing, interest level,etc.)?

Answered: 67      Skipped: 7

#	RESPONSES	DATE
1	timing and interest level	6/30/2021 4:46 PM
2	I had to go to my 2nd job which is in the evening.	6/29/2021 10:19 AM
3	I didn't get to go to all of them, mainly because I had other things I needed to do in the evening.	6/29/2021 9:29 AM
4	Timing	6/29/2021 8:26 AM
5	Timing I would be on the subway on my way home from work.	6/28/2021 4:21 PM
6	Timing, too many responsibilities at home.	6/28/2021 3:45 PM
7	had a few things going on that I wasn't able to miss	6/28/2021 3:26 PM
8	Timing	6/25/2021 1:32 PM
9	Timing.	6/24/2021 10:37 AM
10	Had family obligations.	6/23/2021 10:34 AM
11	The timing. From getting home and dinner, maybe if they were later in the evening after home life is settled.	6/22/2021 8:42 AM
12	timing	6/21/2021 6:30 PM
13	Social Anxiety	6/21/2021 5:15 PM
14	spending time with family was my priority... most nights could not get free.	6/21/2021 4:41 PM
15	Timing	6/21/2021 4:17 PM
16	Some events I could not attend because of timing.	6/21/2021 2:34 PM
17	Timing	6/21/2021 1:27 PM
18	After signing out for work I care for my elderly mother so the timing for the events could not be included in my schedule.	6/21/2021 1:20 PM
19	Timing, dinners, family, etc.	6/21/2021 12:25 PM
20	Timing and also interest level.	6/21/2021 12:03 PM
21	I would have liked to participated but was not able to because of responsibilities at home.	6/21/2021 9:45 AM
22	I wasn't aware of evening activities until the sessions began. I have a family to tend to - if I was aware of them before the sessions began - meaning when we signed up I could have made arrangements	6/21/2021 9:16 AM
23	Virtual format seemed weird to me. Knew no one else. Timing not great when I'm at home, since I have a large busy family.	6/18/2021 10:59 AM
24	Timing. Had to complete my work after the Training, late days and eve.	6/18/2021 9:54 AM
25	I had a time conflict most evenings due to personal commitments.	6/18/2021 9:26 AM
26	Timing, family commitments	6/18/2021 9:24 AM
27	I have an autistic son that requires my evenings	6/17/2021 5:17 PM

# NYSFAAA Virtual Novice 2021 Survey

28	Timing and conflicts with other personal activities	6/17/2021 4:47 PM
29	Personal Difficulties and timing	6/17/2021 3:01 PM
30	Timing	6/17/2021 2:40 PM
31	Timing	6/17/2021 2:24 PM
32	Timing conflicted outside work schedule and interfered with personal life obligations	6/17/2021 1:59 PM
33	I can be a bit awkward at times and I felt very weird not really knowing anyone. In person, I would have one hundred percent participated. Also having my boss there did not make it any easier because I don't really know him that well to just let loose!!	6/17/2021 1:30 PM
34	Being virtual, I didn't want to spend all day on my computer and then come home and spend more time on the computer. I also don't feel like its as social and interactive. I prefer in person interactions. If the event was able to be in person I would have participated in the evening events.	6/17/2021 1:03 PM
35	Timing	6/17/2021 12:40 PM
36	Timing.	6/17/2021 12:38 PM
37	Being virtual was great in that it enabled me to have time to do daily tasks at work but also because it meant I was home. Being home in June means I spend most evenings doing other work because the weather permits it at this time of year (home improvement, gardening, and other homesteading things). There was just never time to log back in after starting in on those projects	6/17/2021 11:44 AM
38	timing	6/17/2021 11:33 AM
39	Didn't have time	6/17/2021 11:20 AM
40	Other things going on in the evening, also once I'm home and away from work, didn't think about it.	6/17/2021 11:15 AM
41	timing and not interested in participating virtually	6/17/2021 10:49 AM
42	I did except I for Monday night because I had prior plans.	6/17/2021 10:47 AM
43	Timing.	6/17/2021 10:39 AM
44	The timing of the events did make attending all of them difficult especially after working all day and having them in the middle of the evening	6/17/2021 10:39 AM
45	timing, I had other obligations in the evening	6/17/2021 10:38 AM
46	Timing	6/17/2021 10:38 AM
47	Timing	6/17/2021 10:37 AM
48	Timing	6/17/2021 10:35 AM
49	I work a part-time job in the evenings so a couple nights I was scheduled to work. Then the other evenings I had other obligations that prevented me from logging in.	6/17/2021 10:35 AM
50	Timing and the fact it was virtual	6/17/2021 10:34 AM
51	One evening I was unable to participate due to a conflict (prior dinner plans).	6/17/2021 10:34 AM
52	Power outage for trivia night Internet outage for Karaoke	6/17/2021 10:32 AM
53	I already had plans.	6/17/2021 10:26 AM
54	The evening events were difficult for me to participate in due to family obligations. If this were an in-person training I may have been more likely to attend some of the evening activities.	6/17/2021 10:25 AM
55	Attended conference from work and because I didn't have anyone in my small group it was harder to network therefore less interested in evening activities without knowing anyone	6/17/2021 10:25 AM
56	I have 3 kids in sports. That keeps me very busy in the evenings.	6/17/2021 10:23 AM

# NYSFAAA Virtual Novice 2021 Survey

57	Travel time from work to home did not allow for participation.	6/17/2021 10:12 AM
58	Toddler at home and baby on the way...evenings are my only time to get things done!	6/17/2021 10:11 AM
59	I work a PT job in the evenings.	6/17/2021 10:11 AM
60	Not a super social person. Also, that is my time with my family.	6/17/2021 10:09 AM
61	Timing	6/17/2021 10:08 AM
62	I have a 2 year old and 4 year old. I would if it were an in person conference.	6/17/2021 10:06 AM
63	I couldn't go to the others because I already had plans those evenings	6/17/2021 10:04 AM
64	timing	6/17/2021 10:03 AM
65	Had things I needed to do in the evening	6/17/2021 10:03 AM
66	It was 7pm and I had worked a full day. I was tired by the evening	6/17/2021 10:00 AM
67	Timing, family, 2 toddlers.	6/17/2021 9:59 AM

## Q14 What would you suggest for an evening activity?

Answered: 44      Skipped: 30

#	RESPONSES	DATE
1	Virtual evening activities are tough. Trivia works the best.	6/30/2021 4:46 PM
2	I'm not sure how doable this would be, but maybe a gaming night. To go with the theme of super heroes, maybe we could have done a fighting game like Marvel vs Capcom. A button mashing game anyone could play.	6/29/2021 9:29 AM
3	N/A	6/28/2021 4:21 PM
4	Not sure	6/24/2021 10:37 AM
5	Bingo, trivia, socializing	6/22/2021 8:42 AM
6	na	6/21/2021 6:30 PM
7	Not sure... I just feel like zoom limits networking ability. But at the same time... I'm not sure I'd leave my family for 5 days if it was in person.	6/21/2021 4:41 PM
8	During the day. :)	6/21/2021 4:17 PM
9	Bingo and more Trivia games.	6/21/2021 2:34 PM
10	Network	6/21/2021 1:27 PM
11	In my opinion the events sounded great and if I knew prior to taking the training we would have after hour events, I would have planned to participate.	6/21/2021 1:20 PM
12	I think the offerings were totally satisfactory and fun, I just couldn't attend them.	6/21/2021 12:25 PM
13	nothing other than the ones you already have	6/21/2021 12:03 PM
14	Happy hour- after those sessions we all need a drink :)	6/21/2021 9:16 AM
15	I would only participate in evening activities in person.	6/18/2021 10:59 AM
16	In person	6/18/2021 9:54 AM
17	Trivia nights or maybe virtual bingo	6/18/2021 9:26 AM
18	I liked the mix of evening activities-a game-type activity should always be in the mix as it brings people together.	6/17/2021 5:00 PM
19	Trivia and karaoke were good options. Activities over zoom are challenging.	6/17/2021 4:47 PM
20	If it is remote, possibly like a watch party of a new popular show.	6/17/2021 2:40 PM
21	We had a magician/mentalists at a staff meeting yesterday and surprisingly even though it was virtual it was very entertaining!! I was floored at how he could guess what we were thinking even through the computer screens.	6/17/2021 1:30 PM
22	ice cream social, movie night, board games.	6/17/2021 1:03 PM
23	No suggestion	6/17/2021 12:38 PM
24	I would suggest an "afternoon" activity one day. Or even a virtual lunch where we could "eat" together via zoom after our meetings.	6/17/2021 11:44 AM
25	Ice breaker types of activities.	6/17/2021 11:33 AM
26	I like the ideas that y'all had, just not enough time for me	6/17/2021 11:20 AM

27      The activities looked great and interesting. What if you varied when the      social

opportunities were? Such as a lunchtime meeting? This would be great for blowing off steam in the middle of a heavy day. Or meet earlier - like right after the last afternoon presentation? That way people's

6/17/2021 11:15 AM

## NYSFAAA Virtual Novice 2021 Survey

mind is still on work or you can catch them as soon as they get home instead of getting home then switching gears back to work again.

28	Games that can be played with large groups like bingo.	6/17/2021 10:49 AM
29	Bingo.	6/17/2021 10:39 AM
30	A NYSFAA scavenger hunt	6/17/2021 10:39 AM
31	I think all the evening activities that NYSFAAA were great. But I just don't have time.	6/17/2021 10:37 AM
32	I thought the trivia night was a great idea and I am sad I missed it	6/17/2021 10:35 AM
33	I love the happy hour and playing games...	6/17/2021 10:34 AM
34	n/a	6/17/2021 10:26 AM
35	Round table discussions based on school location, personal interests. Also pairing several new members with mentors could also be positive for long term connections.	6/17/2021 10:25 AM
36	BINGO with prizes. Maybe make it fun with FA topics so you are also learning as you are playing?	6/17/2021 10:25 AM
37	Virtual games in addition to trivia?	6/17/2021 10:11 AM
38	none	6/17/2021 10:09 AM
39	Games, fun to work together in teams... adds in competition and fun!	6/17/2021 10:08 AM
40	Trivia sounded fun, more game options.	6/17/2021 10:06 AM
41	I think the ones you offered were the best for a virtual setting	6/17/2021 10:04 AM
42	watch together	6/17/2021 10:03 AM
43	N/A	6/17/2021 10:00 AM
44	n/a	6/17/2021 9:59 AM

## Q15 What was your favorite part of our virtual event?

Answered: 54      Skipped: 20

#	RESPONSES	DATE
1	small group sessions	6/30/2021 4:46 PM
2	How welcoming and friendly everyone was.	6/29/2021 9:29 AM
3	Small groups	6/29/2021 8:26 AM
4	Learning the basics.	6/28/2021 4:21 PM
5	Learning new things and reinforcing what I already know.	6/28/2021 3:45 PM
6	I am not sure I had a favorite I thought all of it was done very well	6/28/2021 3:26 PM
7	flexibility	6/25/2021 1:32 PM
8	Meet new people	6/24/2021 10:37 AM
9	Small groups.	6/23/2021 10:34 AM
10	I enjoyed the sessions	6/22/2021 8:42 AM
11	The small group sessions	6/21/2021 6:30 PM
12	Getting to learn more about my job duties and meet others.	6/21/2021 5:15 PM
13	I enjoyed the combination of the large and small groups. Felt the topics covered were very relevant and helpful.	6/21/2021 4:41 PM
14	The small group discussions.	6/21/2021 2:34 PM
15	My favorite part of this virtual event was the small group because it was intimate.	6/21/2021 1:20 PM
16	The humorous portion of the answers we get to questions.	6/21/2021 12:25 PM
17	The small group to answer specific questions.	6/21/2021 12:03 PM
18	The small group sessions made it easy to ask questions and converse with other group members.	6/21/2021 9:45 AM
19	Small groups.	6/21/2021 9:16 AM
20	Listening to the large group speakers.	6/18/2021 10:59 AM
21	Outstanding educational event - Brian Smith focused in on all of the training components.	6/18/2021 9:54 AM
22	I liked the large group sessions. They were very informative.	6/18/2021 9:26 AM
23	The small group	6/17/2021 5:17 PM
24	Meeting my peers in other colleges and developing contacts.	6/17/2021 5:00 PM
25	The ability to have small group discussions.	6/17/2021 4:47 PM
26	The classes and the discussion in small group	6/17/2021 3:01 PM
27	Trivia	6/17/2021 2:40 PM
28	I loved the break out sessions.	6/17/2021 1:30 PM
29	Meeting some new people.	6/17/2021 1:03 PM
30	The large group sessions.	6/17/2021 12:38 PM

31 It afforded me the ability to keep up with other things while still

participati



ng in all the training. I also like the organization of the materials in an online format. Made things easy to find and

6/17/2021 11:44 AM

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more importantly, easy to return to when I want to reference them in the future.

32	Meeting others.	6/17/2021 11:33 AM
33	Small group discussion, when it really got going and a lot of people were involved, was great.	6/17/2021 11:15 AM
34	being able to have small group sessions to discuss and ask any questions. Having a SAP session	6/17/2021 10:49 AM
35	Obviously, the large group setting learning new material and refreshing me with topics I already knew. Anything online is more difficult than having an in-person training, but I felt like we were still engaged and able to network through different avenues.	6/17/2021 10:47 AM
36	Small groups.	6/17/2021 10:39 AM
37	Having the small groups right after the large group sessions	6/17/2021 10:39 AM
38	Large group info sessions	6/17/2021 10:38 AM
39	Large Groups	6/17/2021 10:38 AM
40	well if I have time to join, I believe Karaoke is the best. even I don't know how to sing but I do enjoy people singing.	6/17/2021 10:37 AM
41	small group	6/17/2021 10:35 AM
42	I liked the Whova app. It really provides a lot of opportunities to learn more about fellow attendees & create discussions about various topics.	6/17/2021 10:35 AM
43	Putting faces to names!	6/17/2021 10:34 AM
44	n/a	6/17/2021 10:26 AM
45	The small groups.	6/17/2021 10:25 AM
46	The small group interaction	6/17/2021 10:25 AM
47	Small group sessions	6/17/2021 10:11 AM
48	Getting to know everyone and being able to create connections. The Financial Aid Community is really so very friendly and helpful!	6/17/2021 10:08 AM
49	small group	6/17/2021 10:06 AM
50	Getting to meet people, especially the leadership team, was really great.	6/17/2021 10:04 AM
51	meeting new people and sharing experiences	6/17/2021 10:03 AM
52	the fact that I could save all of the material so I can reference it whenever I need was very appreciated.	6/17/2021 10:03 AM
53	I liked meeting people from other schools	6/17/2021 10:00 AM
54	Interaction	6/17/2021 9:59 AM

## Q16 What, if anything, did you dislike about our virtual event?

Answered: 39

Skipped: 35

#	RESPONSES	DATE
1	That it was virtual. I would have loved to meet everyone in person.	6/29/2021 9:29 AM
2	Not as many Clock hour examples	6/28/2021 4:21 PM
3	maybe that at times I couldn't put my whole thought process in it. I think if you actually go away for it . that's all you can do but when at home things get in the way	6/28/2021 3:26 PM
4	N/A	6/24/2021 10:37 AM
5	Lots of information on the slides which is great for when I review later but sometimes not enough time to read them all before presenter moved onto next slide.	6/23/2021 10:34 AM
6	In small groups if we went into further information than the large groups. At times I felt like it was just the same as we heard in large groups.	6/22/2021 8:42 AM
7	n/a	6/21/2021 6:30 PM
8	i couldn't attend them.	6/21/2021 4:17 PM
9	Long/multiple presentations.	6/21/2021 2:34 PM
10	I was not informed prior to the event on how to log in or about evening activities that I was not able to attend because of my obligations.	6/21/2021 1:20 PM
11	Nothing.	6/21/2021 12:25 PM
12	I prefer 100% in person, the virtual event is it what it is.	6/21/2021 12:03 PM
13	NOT ENOUGH TIME	6/21/2021 9:16 AM
14	Calculating EFC required multiple screens/pages and jumping back and forth, which I was unable to do (small slow laptop), so maybe just watching someone else do it would be better, or printing papers ahead of time, so jumping around on screen isn't needed.	6/18/2021 10:59 AM
15	Looking forward to an in person event. Enjoyed entire event!	6/18/2021 9:54 AM
16	Not being in person-seems obvious but it so makes a difference. I also prefer the 24-7 nature of in-person events; more immersive, deeper bonds and knowledge formed when your with peers all the time. It was difficult to keep up with some of the Community topics-there was so much good info being shared but I know I missed some of it. Limit the number of topics?	6/17/2021 5:00 PM
17	I think everyone did a great job with the limitations of a virtual event.	6/17/2021 4:47 PM
18	Nah. All ok	6/17/2021 3:01 PM
19	n/a	6/17/2021 2:40 PM
20	lack of networking opportunities, getting to know attendees	6/17/2021 1:59 PM
21	I was not able to see anyone except the speakers. I am not sure if the hosts set it up that way or if it was my own set up but I like seeing other people aside from the group leaders.	6/17/2021 1:30 PM
22	That the event was virtual.	6/17/2021 1:03 PM
23	N/A	6/17/2021 11:44 AM
24	Not as much opportunity to spend time with and talk to others. Was not a fan of the large group sessions.	6/17/2021 11:33 AM
25	The exam!	6/17/2021 11:15 AM

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26	felt to short. I wished there were more large group sessions	6/17/2021 10:49 AM
27	Timing.	6/17/2021 10:39 AM
28	Not being able to make connections in person :(	6/17/2021 10:39 AM
29	Actually, I don't have anything I dislike. except some sessions have a little too much information and the time is running short for the presenter so they couldn't go over all stuff they want to share and they have to cut it out.	6/17/2021 10:37 AM
30	no being able to participate and ask questions during large group	6/17/2021 10:35 AM
31	The sound (could be due to me not having headphones) was not always the greatest.	6/17/2021 10:34 AM
32	Would prefer to be in person.	6/17/2021 10:26 AM
33	The final felt a little stressful as there was so much information covered, but it did help to have materials from throughout the week to help.	6/17/2021 10:25 AM
34	I enjoyed having this as a virtual event.	6/17/2021 10:25 AM
35	Nothing.	6/17/2021 10:08 AM
36	It was well run, no complaints	6/17/2021 10:06 AM
37	technical issues	6/17/2021 10:03 AM
38	It felt like the small groups just went over the same presentation as the large group	6/17/2021 10:00 AM
39	Wish others put their cameras on zoom, felt like only 3 or 4 of us in small group had them on	6/17/2021 9:59 AM

## Q17 What topics would you like to see covered in future conferences/trainings?

Answered: 34      Skipped: 40

#	RESPONSES	DATE
1	have the test after all the sessions	6/30/2021 4:46 PM
2	Maybe do a run through of some of the federal sites that FA professionals need to use? As a newbie, I sometimes find it hard to keep track!	6/29/2021 9:29 AM
3	Clock Hour Examples and scenarios.	6/28/2021 4:21 PM
4	maybe more verification processing.	6/28/2021 3:26 PM
5	Return title 4, verification, State aid.	6/24/2021 10:37 AM
6	All the things, as I am newer to Financial Aid.	6/22/2021 8:42 AM
7	Same topics... all relevant.	6/21/2021 4:41 PM
8	-NYS awards again -Any updates on the FAFSA or changes to be aware of for the upcoming AY. -Federal Verification again -PELL again	6/21/2021 4:17 PM
9	I felt that everything was discussed, but there could be more information on other grants and scholarship programs in financial aid.	6/21/2021 2:34 PM
10	Everything covered was great.	6/21/2021 12:25 PM
11	I would say samples of case scenarios, for example Verification.	6/21/2021 12:03 PM
12	same topics just more time	6/21/2021 9:16 AM
13	I would like to not have to choose between the break-out sessions. I really wanted to watch both, since I am brand new to this field.	6/18/2021 10:59 AM
14	Look forward to other educational events - TAP, PELL, updates, Need calculations, etc.	6/18/2021 9:54 AM
15	More about NYS-specific financial aid programs	6/18/2021 9:26 AM
16	More hands on options-loved doing the EFC manual calculations.	6/17/2021 5:00 PM
17	All NASFAA credential topics are good ones!	6/17/2021 4:47 PM
18	No Clue. I am really, really, a rookie	6/17/2021 3:01 PM
19	More time for NYS aid - the breakout session was vital, but not enough time was allotted	6/17/2021 2:24 PM
20	Working with challenging parents, students working through tough situations veterans - how to handle professional judgements, loan defaults while on active duty, NYSVTA	6/17/2021 1:30 PM
21	Graduate school fin. aid	6/17/2021 12:40 PM
22	More about loans.	6/17/2021 12:38 PM
23	More detail in the verification training (i.e. tax transcript decoder etc). A presentation on resources of where to find answers to your questions (handbook, askregs, etc)	6/17/2021 11:44 AM
24	verification is the good topic, I would love to see it again but with real sample. R2T4 is also another topic I would like to learn more about and how Cuny and private institutions handle it.	6/17/2021 10:37 AM
25	Maybe tying in Admissions a bit more because it did seem like there were a fair number of Admissions representatives that were in attendance	6/17/2021 10:35 AM
26	You covered everything and then some, I typed 40 pages of notes!	6/17/2021 10:34 AM
27	n/a	6/17/2021 10:26 AM

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28	"Things I wish I knew when starting out as a FA counselor" or "Tips for the 1st year" panel discussions.	6/17/2021 10:25 AM
29	Policies and Procedures Class. I find that a lot of things in FA are determined by your institutions policies and procedures so knowing them or helping to create them would give you a better understanding of how to stay in compliance with them.	6/17/2021 10:25 AM
30	NYS specific topics - Excelsior, scholarships, NYS SAP, etc.	6/17/2021 10:09 AM
31	More TAP!	6/17/2021 10:06 AM
32	I think it would be helpful to learn about more specific topics, relating to the more general sessions.	6/17/2021 10:04 AM
33	R2T4 and Covid Updates/Regulations	6/17/2021 10:00 AM
34	Summer applications and APTS more detailed	6/17/2021 9:59 AM

## Q18 Do you have any other suggestions or feedback you would like to share?

Answered: 26      Skipped: 48

#	RESPONSES	DATE
1	a few of the questions came from information not reviewed - maybe more time spent on the review of the actual documents where we would need to search for information on the test. I found that a few of the test questions were difficult to search for the correct answer.	6/30/2021 4:46 PM
2	Thank you for being so welcoming!	6/29/2021 9:29 AM
3	Just wanted to thank everyone that put this together. You did an excellent job	6/28/2021 3:26 PM
4	Make large and small groups a little longer so they don't feel rushed.	6/24/2021 10:37 AM
5	More of a break down in the small sessions and maybe longer time in them to go into details more.	6/22/2021 8:42 AM
6	If in person, I would try to condense into 3 days... only because with a family, 5 days away would be more than I'd care to spend... and I would end up passing. Perhaps it could be virtual for people like me. Would also like to go deeper into the weeds on certain topics... maybe we didn't have enough time to really ask the extra questions... I'm being very picky, because I'm thinking of the unique cases I encounter that I need to research. All in all... it was a great conference.	6/21/2021 4:41 PM
7	I cannot wait to attend in person! I am not a virtual event participant. The Conference was great!	6/21/2021 4:17 PM
8	Everything was fine. Could not have been better.	6/21/2021 2:34 PM
9	N/A	6/21/2021 12:03 PM
10	I want to thank you all for hosting this and providing a platform for us newbies to ask questions and LEARN. I appreciated this so very much. Thank you for hosting this and all the work involved in it	6/21/2021 9:16 AM
11	I think I covered it.	6/18/2021 10:59 AM
12	Thank you!	6/18/2021 9:54 AM
13	I hope to see virtual event options continue in the future, even if it is a modified option of an in-person event, once those resume.	6/18/2021 9:26 AM
14	The Whova platform was great! Easy to navigate, the ability to click on the large or small group boxes and be directed right into the session was a time saver. The My Profile part was a little clunky to use.	6/17/2021 5:00 PM
15	I would say that University Directors should be encouraged to invite true novices so that there is not such a disparity in the knowledge base of the group. There was one or two others that were in my group that were there more than 4 years so when questions were asked in small group naturally there was a natural instinct to answer and also ask more advanced level questions. I thought at times that may have have led to individuals that were true novices to not participate as much. I personally think that persons that have been in FA for more than 3 years should attend conferences but not the novice. I think that there are so many trainings out there that are designed to give us a refresher that we can take advantage of if our supervisors feel that we need more training or if we ourselves feel inclined to learn more. That being said, I was incredibly pleased to see the energy amongst the group leaders and the presenters and it was nice to see the newcomers to FA come in at an exciting time of changes in the industry.	6/17/2021 1:30 PM
16	The event was a success! It provided us with lots of knowledge and all the presenters, leaders and staff were excellent!	6/17/2021 12:38 PM

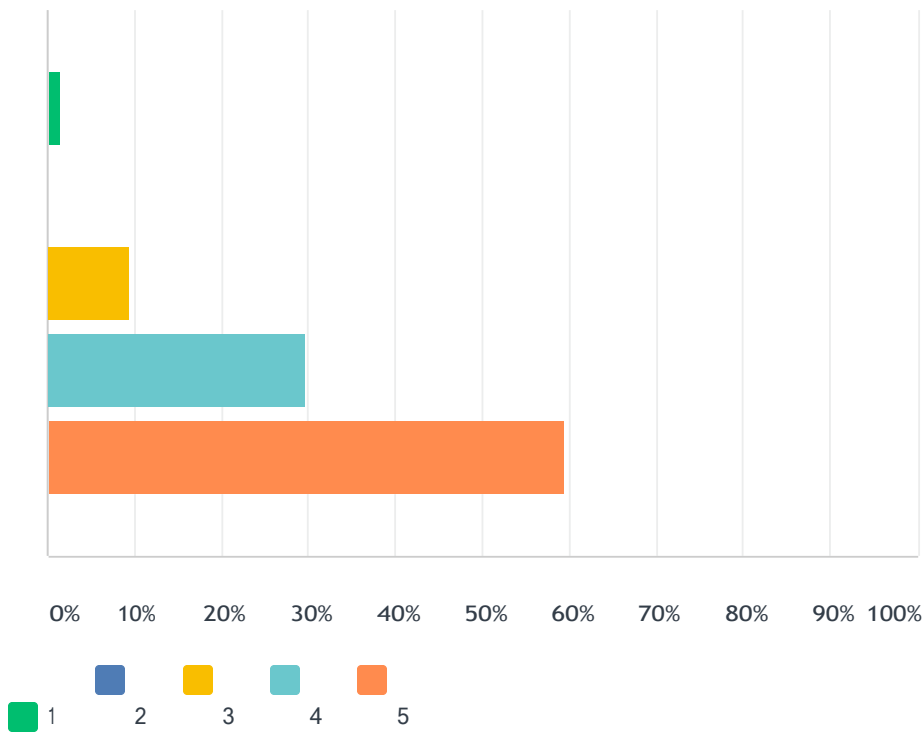
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17	You obviously had some very experienced people who really know their stuff giving these presentations. That was great!	6/17/2021 11:15 AM
18	At some point, when in-person events can happen, it will be nice to meet everyone face-to-face. Thank you to the organizers & presenters who made this a great training. Even in my short year and a half in financial aid I have taken part in other trainings, and this training was by far the most beneficial and was an excellent learning experience for me.	6/17/2021 10:47 AM
19	N/A	6/17/2021 10:39 AM
20	For the small group session: It would be better if there a list of questions that we have to go through after each session because a lot of people are new to Financial Aid and after listen to the presenter sometime they still have no clue what it is. Note: I do like the small group session. we all can get to know other people from different college and networking with them.	6/17/2021 10:37 AM
21	Not at this time.	6/17/2021 10:34 AM
22	n/a	6/17/2021 10:26 AM
23	Thank you to all members who worked so hard to put this program together. I appreciate all of the seen and unseen effort that went into make this event a success!	6/17/2021 10:25 AM
24	Great training, great leaders! I have attended many trainings and this by far was my favorite. I wish I was able to attend in person, it would have been a blast. Thank you all for welcoming me into the Financial Aid Sector!!!	6/17/2021 10:08 AM
25	Every presenter was very knowledgeable. My small group was very friendly.	6/17/2021 10:00 AM
26	Liked the event. Wish I could've experienced it when it was hosted at a college dorm. It was fun though. Wish activities were maybe done in the afternoon vs the night option. It is very difficult to attend at 7pm or even 8pm when you have a family and working all day long. Post test seemed a bit hard and tricky questions even though I got an 82 on it. Maybe next time it can be "group" tests and see which group scores highest. Thank you for letting me be a part of this virtual experience :)	6/17/2021 9:59 AM



# Q19 Did this event meet your expectations?

Answered: 64      Skipped: 10



	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
S	1.56% 1	0.00% 0	9.38% 6	29.69% 19	59.38% 38	64	4.45