



NYSFAAA

New York State Financial Aid Administrators Association, Inc.

2021-2022 Annual Report



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President's Remarks

NYSFAAA President 2021-2022 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 52nd NYSFAAA Conference. The diversity of our organization gives me hope that I will not be the last.

We are improving our social media presence with our Facebook page *NYSFAAA Discussion Board*. If you haven't checked out the site yet, then please check out the information online. The year of 2021-2022 has been continued to be filled with extraordinary challenges. These challenges have made it impossible for our organization to have meetings, Novice Training, Advocacy Day in person. I am very happy that we can have our 2022 Conference in person at High Peaks Resort and I am looking forward to seeing everyone in Lake Placid.

We have become an organization that meets in a virtual world for everything. I hope in the coming year that our regions will begin having at least two meetings in person. Student Financial Aid professionals do better when we can network. Networking does better in a in person format.

In late Spring 2022 we had elections for the next First Vice President, Second Vice President, Secretary and Treasurer. As Past President, I will look forward to working with President Patti Donahue, First Vice President Amy Thompson, Second Vice President Robert Zasso and Treasurer Joseph Weglarz in the coming year in their new roles.

2021-2022 Executive Council

Adrienne R. King – President – Bank Street College of Education
Patti Donahue – President Elect- Binghamton University
Renee Swift – First Vice President – Nazareth College
Brian Smith – Second Vice President – SUNY at Cobleskill
Shalena Clary – Treasurer – Corning Community College
Joseph Weglarz – Treasurer Elect – Marist College
Anne Sullivan-Polino -Secretary – Bryant and Stratton College
Nicole Griffo – Region 1 – Hilbert College
Lucinda Snyder– Region 2 – University of Rochester
Peg Stearns– Region iii – Syracuse University
Rochelle Filler – Region IV – Rensselaer Polytechnic Institute
Janice Hilbrink – Region V – Pace University
Thomas Zarkos– Region VI – Teachers College
Erica Follick – Region VII – Stony Brook University
Sonya Stein– Region VIII – Paul Smith's College
Lisa Simpson – HESC Liaison

I would like to thank the Council for their hard work and diligence during this challenging year. 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. Lisa continues to provide NYSFAAA with information that we were able to provide to our students and higher education institutions.



Goals and Objectives

- 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, as Past-President I look forward to 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 24, 2022 at High Peaks Resort, Lake Placid, NY.
- NYSFAAA 54th Annual Conference, October 25-27, 2022 High Peaks Resort Lake Placid, NY.
- 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 Albany.

**Please note that the last two bullets will occur if we are allowed to 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 that 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. As I get ready to pass the gavel, I would like to

Respectably submitted,
Adrienne R. King



NYSFAAA 2022 - 2023 Goals and Objectives

Graduate Professional Concerns

Goals and Objectives for 2022-2023:

- Continue to inform and advise NYSFAAA leadership
- Develop and offer training at the 2023 NYSFAAA conference

Development (Fundraising) Committee

Goals and Objectives for 2022-2023

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

Mentorship Committee

Goals and Objectives for 2022-2023 (for future planning):

- 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.

Treasurer; Budget Committee; Investment Committee

Goals and Objectives for 2022-2023:

- The primary short term goal is transition Treasurer Elect into the Treasurer position with the assistance of the Treasurer who transitions to Past Treasurer. Access to accounts and training have been ongoing over the last few months.
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- Discussion has been ongoing in regard to the utilization of a drop box with KeyBank where our accounts are held. We are hoping to conclude the cost analysis and visit the Albany location where the drop box would be located to learn more about what our process would look like.
-
- 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 2022-2023:

- Leverage membership in NASFAA's new State Advocacy Network to share info & resources with the GRC, EC, and as appropriate, the broader NYSFAAA community, regarding new and emerging student aid legislative and policy trends. Utilize NASFAA's State Advocacy Toolkit resources.
- Continue networking with and directly collaborate with EASFAA and NASFAA in their Government Relations outreach efforts.
- 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 possible 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 2023 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 2022-2023:

- Had not discussed upcoming goals and objectives. Will allow the new First Vice President to convene the committee and forge a plan.

Novice Training

The goal is to offer Novice 2023 as an in-person event.

Things to do differently:

- TESTMOZ was great - setup to get emails to send results
 - change question 3 (was in novice handbook)
 - Make all questions multiple choice (not short answer for grading)
 - Maybe make the time longer? 90 minutes might have been too short (105 min)?
 - Have TESTMOZ send results
- Breakout ideas: Athletic Aid, ROTC, institutional aid
- Continue Small Group guide - add more questions
- Continue Campus Based Funds presentation in small group
- Send resources with Pre-Test
- Resources
 - Listservs
 - LG or SG presentation - how to navigate resources.



George Chin Memorial Scholarship Committee

Goals and Objectives for 2022-2023:

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.

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
- Try and get back to a more normal (pre-covid) way to manage outreach
- 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



Committee Reports

2021 Conference Committee

New York State Financial Aid Administrators Association(NYSFAAA)

2021 Conference Report

Submitted by Debbie Evans and Jeanne McCarthy December 2021

2021 has been an unprecedented year given the ongoing COVID 19 pandemic.

In November 2020, Executive Council (EC) decided to move the annual conference to a virtual format once again. We continue to work with Hilton Long Island to facilitate use of the deposits that were initially made for the anticipated EC meeting in June 2020 and the planned 2020 conference. It is hoped that NYSFAAA will be able to use those funds sometime in the future for training, EC meetings etc.

The 2021 conference took place virtually over 3 days – October 26 – 28, 2021 The conference fee was \$50 for all paid members. 2021 Novice attendees were granted a free conference registration. The final number of registrants was 49 Novice, 352 paid, total 402.

Program

Chairs – Howard Leslie, Clair Jacobi and Jeanine Murphy. We had a very robust agenda that allowed attendees to choose sessions based on their level of experience (novice, advanced, everyone, proprietary).

The agenda follows:

General Session - Welcome
Verification
VA Benefits
Making Financial Literacy Stick
Ethics in Financial Aid
COD Update
Developing Your Career
Is social media Worth the Effort?
Forthcoming 90/10 Calculation Changes
VA Benefits Certification and Best Practices
R2T4 Calculation
Networking Lunch
General Session HESC Update
General Session Diversity
Focus Symposium: SAP
Focus Symposium: PJ and Verification



Focus Symposium: Student Communication
Focus Symposium: HEERF
Focus Symposium: Diversity
Virtual Happy Hour
General Session - Having Fun with Taxes - theConference Version
Mistakes You're Making with your P&Ps
TAP Certification and SAP
Financial Aid Advocacy & You: Getting Started!
The Space Between: A Mindful Break forCounselors
Re-Application for School Eligibility
Networking Lunch
General Session - NASFAA Update
Enrollment Management
Customer Service
Changes in FAFSA and the Formula
SSCR Reporting
Professional Judgment
Trivia!
EASFAA Greeting, NYSFAAA Scholarships andBusiness Meeting, Presidents' Panel
Thriving in Change
R2T4 Changes in Regs for Modules
Preparing for the End of COVID-19 Forbearance
HEERF
Empowering Tomorrow's Leaders
Networking Lunch
Federal Update
Award, Raffles - Conference Closing
Trivia!



Business Partners

Chairs – Chris Earnshaw and Stephanie Stock

As this was not an in-person but rather a virtual conference, opportunities for business partners (BP) were limited. We explored the possibility of purchasing the exhibitor add-on within the Whova platform, but it was determined that due to lack of interest from attendees (indicated in the survey responses after the 2020 virtual conference) and overall cost that this was not feasible. As an alternative, business partners were asked to submit a donation to the George Chin Memorial Scholarship (GCMS) Fund. This scholarship program aids high-performing students of need attending schools throughout New York. In exchange for their donation, NYSFAAA posted the business partner's company logo and link on the Whova platform, increasing exposure for that business partner. 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 **14** business partners were able to contribute, resulting in **\$4,400** in donations to the fund.

Publicity

Stephanie Stock, Debbie Evans and Jeanne McCarthy developed a cadence of emails that were sent every two weeks via member clicks communication center that included both information on registration and fundraising for the GCMS. These communications were sent by the webmaster.

Other Resources used to ignite interest were the NYSFAAA.org homepage and Facebook. NYSFAAA's Facebook administrators are:

- Lea Nuwer nicholla@buffalostate.edu
- Sean Sherwood ssherwod@binghamton.edu
- Tanya Patterson-Stanley tpatte01@nyit.edu
- Sonia Stein sstein@paulsmiths.edu

NYSFAAA's webmasters are:

- Howard Leslie hdl@berkeleycollege.edu
- Lea Nuwer nicholla@buffalostate.edu

Recommendations (when back to in-person conferences)

- 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 them 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, addition of photos, addition of other visuals etc.)
- Coordinate any email messaging that is going out to the general listserv with the various conference subcommittee chairs so that timing of messages makes sense and there isn't a deluge of emails with competing messages.
- **We strongly recommend checking** with non-conference committees to ensure they are not planning communications on the same day – we received complaints about too many NYSFAAA emails.



Technology

Chairs – Howard Leslie and Sean Sherwood

The technology used for the NYSFAAA 2021 Conference was two-fold:

1. WHOVA - Whova is a conference agenda/engagement platform that allows conference organizers to build and manage their conference details, attendees, agendas, presentations, etc. as a "one stop shop." The NYSFAAA Conference Committee utilized WHOVA to post the 3-day agenda and manage the many ZOOM links which were assigned to the various sessions. WHOVA also allows the organizers to load in registered attendees, communicate with attendees, and provide interactive engagement within the platform, including an open forum, photo posting, and messaging functions.

2. ZOOM - Zoom was used for the actual presentations. We used both the ZOOM Webinar feature (for the large sessions - 1000-person capacity) and the ZOOM Meeting feature (for the breakout sessions - 100-person capacity). Each breakout session was assigned a different ZOOM room "link" which was managed by a moderator and speaker for each session. The rooms were linked in each agenda session and on the main landing page in WHOVA.

It was decided by EC that each session would be recorded and made available to only registered conferees. This was announced when the conference began. This ended up being a good decision due to the technical difficulties during the first session which prevented recordings. No one can say they registered based on the promise of recordings.

Our zoom license promised 20 Giga Bytes (GB) of cloud memory. Not knowing how much memory we would require we increased our cloud memory by 100 GB for October. We ended up only using 14 GB.

The Technology and Innovation Committee decided to let the recordings continue to be housed on the cloud rather than transfer them to YouTube. The advantages of that were the ability to post the videos to the website quickly at the end of each day, and the view is far more professional. The disadvantages are if storage space may be needed next year, we will have to remove the videos from the website or add/pay for more space or transfer to YouTube and we will lose the ability to count views (until it can be figured out (if at all)).

All in all, we are pleased that we decided to record the sessions. It seems to be very popular.

Fundraising for the NYSFAAA GCMS

Chairs - Crystal Krudis and Janice Hilbrink

Being in a virtual environment for the 2nd year in a row, the NYSFAAA website was enhanced to allow individuals to make donations to the GCMS. It was again suggested to the membership that if a member passed away, a donation could be made in their memory, which would aid in the effort of NYSFAAA's goal of providing support to students attending schools in New York State. This appears to have been well received by the membership as there were donations made, totaling \$785. (An additional donation from the Chin family is pending).

Since there was no "vendor" area where our BP have traditionally paid to have a space where they could meet with members, a recommendation was made to solicit donations to the GCMS (which is allowable under the SLATE Act). The donation allowed the corporations to provide a logo with a link to their company's website which were displayed both before and during the conference on the Whova app. **14** business partners contributed



resulting in **\$4,400** in donations to the fund.

For members to participate in the fundraising process as they would at an in-person conference, the committee proposed virtual and 50/50 raffles. Each region was asked to provide e gift cards for prizes. These prizes ranged from \$100 to \$250. Tickets were sold through the website with all purchases made by credit card with the funds going directly into the scholarship account. There were 184 participants in the raffles with income totaling \$1,805. The virtual 50/50 was handled in the same way. There were 177 participants with income totaling \$1,560 with \$780 going to the winner and \$780 going to the scholarship fund.

The total income for the 2021 going to the NYSFAAA GCMS was \$7,770. This amount fully covered the cost of the 5 scholarships awarded this year at \$1,500 each.

Entertainment

Chairs – Gene Rogers and Amy Thompson

Three entertainment events occurred throughout the three-day virtual conference. A virtual happy hour and two trivia games.

Virtual Happy Hour

- Tuesday October 26, 2021, 3:50-4:30 p.m. (originally scheduled for 3:20-4:00 p.m. agenda was pushed back 30 minutes on the first day).
- Located in the Hudson Valley Room and the Leatherstocking Room
- 34 attendees added to their agenda
-

Financial Aid Themed Trivia

- Wednesday October 27, 2021, 2:15-3:00 p.m.
- Located in the Five Boroughs Room
- 39 attendees added to their agenda
- Approximately 40 people did attend
- 10 teams participated
- First place Team: Robert Weirnerman, Anna Chrissotimos, Josie Edwards, Jeffrey Louis-Jean
 - Each win \$25.00 Amazon Gift Card
- Second Place Team: Sean Sherwood, Robyn Rhyner, Clair Jacobi, Adrienne King
 - Each win \$10.00 Amazon Gift Card

1980's Themed Trivia

- Thursday October 28, 2021, 2:30-3:30 p.m.
- Located in the Five Boroughs Room
- 29 attendees added to their agenda
- Approximately 34 people did attend
- 8 teams participated
- First place Team: Brian Birch, Laura Worley, Howard Leslie, Renee Swift



- Each win \$25.00 Amazon Gift Card
- Second Place Team: Clair Jacobi, Ideta Daniel, Josie Edwards, Linda Jaycox-Thatcher
 - Each Win \$10.00 Amazon gift Card

Total Budget Expended: \$280.00

A survey was conducted, and results are available in a separate document. Whova provided a detailed report, also available in a separate document.

Graduate Professional Concerns Committee

Committee Name: Graduate Professional Concerns

Committee Members:

Chair: Darrin Rooker, Northeast College of Health Sciences
Margaret Christian, University of Rochester School of Medicine & Dentistry
Tanya Patterson-Stanley, MPA, NYIT College of Osteopathic Medicine

Summary of Activities for 2021-2022:

- Advised NYSFAAA leadership on issues related to graduate and professional schools and/or students
- Conducted a Graduate/Professional issues session at the virtual 2021 NYSFAAA Conference.

Goals and Objectives for 2022-2023:

- Continue to inform and advise NYSFAAA leadership
- Develop and offer training at the 2023 NYSFAAA conference

Future Meetings and Events: As needed.

Submitted By: Darrin Rooker

Date: October 05, 2022

Development (Fundraising) Committee

Committee Name: Development Committee

Committee Members:

Tami Gilbeaux, Inceptia
Tom Dalton, EdFinancial

Summary of Activities for 2021-22

Reviewed previous Committee efforts including:

- Contacting philanthropic organizations
- NYSFAAA Store
-



Goals and Objectives for 2022-23

- Offering vendors additional options (additional fee):
 - Webinar to showcase a topic/product/service
 - 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: 10.3.2022

Diversity, Equity and Inclusion Committee

PURPOSE: Is responsible for ensuring the Organization is adhering to their DEI commitment of being a safe space organization for all its members and associates and provide ongoing education on the topic. The Committee will actively work to ensure that NYSFAAA provides a platform that is Diverse, Equitable and Inclusive, so all members feel accepted, empowered and safe.

REPORTS TO: The President

MEMBERSHIP:

1. Chair must be an active member of the Association.
2. One active member from each region, nominated by the region, selected by the President and DEI Chair.

TENURE: Chair – Two-year term coinciding with the terms of the statewide officers (renewable by the new president). Members – one year renewable.

QUALIFICATIONS: Works for the DEI mission of the Association.

DUTIES:

1. Review NYSFAAA DEI statement annually for relevancy.
2. Provide annual action plan, including internal activities and training.
3. Provide presentation on DEI-related topics at the annual conference and any NYSFAAA events.
4. Responsible to maintain the mission of DEI in all NYSFAAA activities.

Mentor Committee

Committee Name: Mentorship; Tayler Kreutter, most-recent chair; currently vacant

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

Summary of Activities for 2021-2022:



There was no activity for this committee during this year. The committee is on hiatus until a new chair is identified.

Prior Goals and Objectives for 2021-2022 (for future planning):

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.

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

Submitted By: Renee Swift

Date: 8/18/2022

Elections Committee

Elections and Nomination Committee

The committee successfully completed the election cycle for 2022 with the slate results as follows:

1st Vice President will be Amy Thompson, St. Joseph's, LI

2nd Vice President will be Rob Zasso, Dutchess CC, Poughkeepsie, NY

Treasurer will be Joe Weglarz, Marist College, Poughkeepsie, NY

Secretary will be Megan Kennerknecht, FLCC, Rochester, NY

All will take on their respective roles at the end of the October 2022 Conference.

Treasurer; Budget and Investment Committee

Committee Members: N/A

Summary of Activities for 2021-2022:

COVID has continued to create an interesting situation for our organization financially. This year's budget creation included conversation and projections moving back to in person meetings and conference, knowing that many schools are still operating under limited budgets. Determining estimated participation at conferences is challenging as we do not have historical data of what our association looks like coming out of a pandemic. Prices of consumer goods and services have also changed significantly since our last in person events, which further complicates the ability to accurately forecast numbers and create an effective budget. Our expenses over the past year have been significantly less with online activities, conferences and training. Overall, our accounts continue to be in good health.



The Treasurer coordinated with committee chairs, executive council leadership and others as appropriate to develop the 2022- 2023 Budget. At that time, the Treasurer was also able to provide current information on the overall financial condition and cash flow status of the organization and to review current NYSFAAA investments. Robert Bell from Morgan Stanley has handled our investment accounts for a very long time, and we are grateful for the guidance he provides. At our August Executive Council meeting, our auditors joined us to share the 2021 year-end reports and financial statements and answer questions. We are fully up to date with audits and anticipate starting and completing the 21-22 audit this fall.

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. The President, President Elect, Treasurer, and Treasurer elect have been meeting to discuss the time commitment needed by the Treasurer and have been discussing possible solutions in addition to discussing how we can create more checks and balances and separation of duties.

Goals and Objectives for 2022-2023:

The primary short term goal is transition Treasurer Elect into the Treasurer position with the assistance of the Treasurer who transitions to Past Treasurer. Access to accounts and training have been ongoing over the last few months.

Discussion has been ongoing in regard to the utilization of a drop box with KeyBank where our accounts are held. We are hoping to conclude the cost analysis and visit the Albany location where the drop box would be located to learn more about what our process would look like.

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:

Current Treasurer Shalena Clary will meet to off-board current projects and responsibilities to Treasurer Elect, Joe Weglarz.

Joe and Shalena will be meeting with Rob Bell from Morgan Stanley about our current investments.

We also will be looking to form a working group/committee discuss our investments, money management, and other financial matters.

Submitted By: Shalena Clary, Treasurer

Date: August 30, 2022



Governance & Ethics Committee

Once Patti Donahue became President-elect, she reached out to the following members, who confirmed their interest in participating in the committee during her Presidency:

- Heather McDonnell
- Darrin Roker
- Scott Atkinson

In addition, the following was completed:

Item #1:

Recommendation from the Governance Committee to change the name of DEI scholarship to the Sherwood Johnson Memorial Diversity, Equity, and Inclusion Award. Forwarded to DEI committee for final updates.

Final draft received from DEI committee, EC voted and passed updates, NYSFAAA website was updated on the following pages:

<https://www.nysfaaa.org/named-service-awards>

<https://www.nysfaaa.org/policies-procedures#nysfaaaawards>

Item #2:

Added DEI committee to the P&P (<https://www.nysfaaa.org/policies-procedures>) with the approved language as follows:

Government Relations Committee

Committee Name: Government Relations

Committee Members:

Christopher E. Barto, LIM College, Co-Chair
Donna Gurnett, Association of Proprietary Colleges (APC), Co-Chair
Clemente (Clem) LaPietra, Monroe College
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 2021-2022:

- Participated in NYSFAAA's virtual 52nd Annual Conference on October 26-28, 2021, where GRC Co-Chair, Christopher Barto, co-presented a joint NYSFAAA/NASFAA session entitled: "Financial Aid Advocacy & You: Getting Started!" with Rachel Gentry, NASFAA's Assistant Director of Federal and State Relations.
- For the Fall 2021 NYSFAAA Regional Training meeting on November 19, 2021, the GRC Co-Chair, Christopher Barto, co-presented another joint NYSFAAA/NASFAA session entitled: "Financial Aid Advocacy and You 2.0: Getting started and where to go from there!"
- The GRC prepared updated 2022 NYSFAAA State Aid Policy Proposals and received the EC's approval for the following NYS legislative advocacy recommendations:
 1. Support Meaningful TAP Awards for New York State Students
 - Increase Minimum TAP Award and Expand Income Eligibility
 2. Eliminate Disparity in Access to TAP Awards



- Standardize Dependent & Independent Student TAP Award Schedules
- 3. Support Opportunity Programs Serving Our Most Vulnerable Students
 - Enhance Funding for Opportunity Programs
- 4. Support HESC and Expand Use of Professional Judgment (PJ) Authority
 - Fund HESC Initiatives and Provide Greater Flexibility for State Aid Professional Adjustments
- 5. Continue to Protect Bundy Aid Funding
- Organized NYSFAAA's virtual participation in the February 1, 2022 Student Aid Alliance Advocacy Day, arranging visits by members of the Executive Council and the Government Relations Committee with key legislators and/or their staff members.
- On Feb. 2, 2022 Christopher Barto participated in a CICU advocacy panel entitled "Moving Forward" and represented NYSFAAA along with president, Adrienne King.
- On Feb. 4, 2022 the GRC Co-Chairs attended a Region 1 meeting and presented on "The Benefits of Advocacy & How to Effectively Engage with Local Legislators" to encourage and offer to support regional advocacy efforts with key local elected officials.
- On Feb. 8, 2022 the GRC Co-Chairs attended a Region 7 meeting and presented on "The Benefits of Advocacy & How to Effectively Engage with Local Legislators" to encourage and offer to support regional advocacy efforts with key local elected officials.
- In early April 2022 the GRC provided detailed feedback on proposed NYS Senate Bill S.5136B per a request from the Charles Silverstein of the Senate Minority Conference. The bill was introduced by Senator Kevin Thomas and contained language that would have significantly expanded the definition of what is considered a private education loan in NY, in particular treating many institutional payment plans as such. The GRC outlined our concerns and several technical considerations and the EC voted unanimously to approve the recommended feedback.
- Throughout spring 2022 the GRC reviewed the text of several other proposed (pending & passed) NYS higher education bills, paying particular attention to the following:
 1. S5924C/A6938B – "Transcript Bill" – sponsored by Sen. Thomas – signed by Gov.
 2. S7699 – Prohibits institutions from implementing any contingencies (i.e. mandatory arbitration agreements, etc.) upon receipt of state funding – sponsored by Sen. Stavisky – signed by Gov
 3. S8484 – "Fair College Admissions Act" – would prohibit Legacy and Early Admissions policies at NYS colleges – sponsored by Sen. Gounardes – pending in Higher Ed Committee
- Continued participation in quarterly NYSFAAA meetings with HESC VP Elsa Magee to assist with communication & collaborations.
- GRC Co-Chair, Christopher Barto, in late fall 2021 was invited to join a newly forming NASFAA State Advocacy Network (with representatives from each state association). The group officially launched in August 2022 with a Charter and the GRC Co-Chair attended the Kick-Off meeting on September 13, 2022. Meetings will be held virtually bi-monthly. The group's charter outlines the following overarching purpose & goals for this new NASFAA initiative:
 1. "Using the advocacy toolkit as the foundation for its state-level work, NASFAA will rely on the State Advocacy Network to spread awareness of this resource among states, provide a forum for leaders in state student aid policy, and monitor additional ways in which NASFAA might support state-level advocacy efforts. Although each state's financial aid system is unique, even states with drastically different student aid landscapes may experience similar policy proposals within their state legislatures. Establishing a network of leaders who are active in monitoring state legislation will help states to be cognizant of emerging issues that may appear in their own state, and to learn best practices that have been effective in other states' advocacy efforts. The network will also allow for NASFAA to gain feedback on additional resources that would be helpful to state-level advocacy efforts and will establish strong communication channels through which states can request additional support from NASFAA on state issues."



Goals and Objectives for 2022-2023:

- Leverage membership in NASFAA's new State Advocacy Network to share info & resources with the GRC, EC, and as appropriate, the broader NYSFAAA community, regarding new and emerging student aid legislative and policy trends. Utilize NASFAA's State Advocacy Toolkit resources.
- Continue networking with and directly collaborate with EASFAA and NASFAA in their Government Relations outreach efforts.
- 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 possible 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 2023 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:

- Schedule monthly meetings for October, November and December 2022 and bi-weekly meetings in January and February 2022. Resume monthly meetings in March 2022.
- 2023 Student Aid Alliance Annual Advocacy Program – tentatively in February 2023.

Submitted By: Christopher E. Barto

Date: October 15, 2022

Membership Committee

Committee Name: Membership Committee

Committee Members:

Lucila A Villaquiran, Chair

Marianne Loper, Region I

Anita Strollo, Region II

Max Flint-Morgan, Region III

Stacey Block, Region IV

Joe Weglarz, Region V

Open, Region VI

Pat Noren, Region VII (has since resigned this role)

Elyse Relyea, Region VIII

Summary of Activities for 2021-2022:

We met a few times in 2021-22. Our major accomplishment was updating the membership application to provide flexibility in answering demographic questions. We conducted a survey of the membership to inquire how this demographic data is used, if at all. We decided to keep the demographic questions and also include



a prefer not answer option. Renee also cleaned up the database to move “non-engaged” members (limited to no interaction with MemberClicks) to Prospect and Pending statuses. In our renewal messaging, we included member testimonials to further demonstrate the value of NYSFAAA.

Goals and Objectives for 2022-2023:

1. Had not discussed upcoming goals and objectives. Will allow the new First Vice President to convene the committee and forge a plan.

Future Meetings and Events:

TBD by new First Vice President

Submitted By: Renee Swift, First Vice President

Date: August 18, 2022

Novice Training Committee

Committee Members:

Sean Sherwood, Binghamton University (co-chair)
Robert Zasso, Dutchess Community College (co-chair)
Josie Edwards, Berkeley College
Scott Khare, Marist College
Courtney Rust, SUNY Canton
Vanessa Diaz, Suffolk County Community College
Denise Reid-Strachan, Onondaga Community College
Nikiya Rodriguez, Hunter Business College
Danielle Emeny, Upstate Medical
LaSonya Griggs, Tompkins Cortland Community College
Howard Leslie, Berkeley College
Kerry Lubold, SUNY Plattsburgh
Dan Robinson, Pace University

Summary of Activities for 2021-2022:

The 2022 Novice training was conducted virtually via the Whova platform from June 13th through June 17th, 2022. We had 118 participants that completed the training and earned their completion certificate.

Despite being virtual, the format of the training was similar to the in-person event. Participants were broken into seven (7) TV-show themed small groups (15-17 participants per). 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 four breakout sessions that included Satisfactory Academic Progress, Modules, Excelsior, and Veteran Benefits.

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

- 135 attendees downloaded the app
- 3,044 messages sent (private and community)
- 128 community board topic posts
- 17 photos taken



- 37 meet-ups created
- 91 personalized agendas set up

The committee offered virtual “fun” events that included the following:

- Tuesday – Meet and Greet
- Wednesday – 2000’s Trivia
- Thursday – Scavenger Hunt

For the Pre-Test and Final Exam, we purchased **TESTMOZ**, an online test creation and grading tool. (testmoz.com). This service allowed us to build the pre-test and final exam, set the timing, point values, etc. This became extremely useful when it came to grading.

Registration fees collected = \$13,590.00

The following includes feedback from the post-event survey:

- Biggest area of improvement is doing NOVICE in person/hybrid model
- Virtual Half-Days are preferred.

The entire survey is included here:

<https://drive.google.com/file/d/1sN3iuzsVDtixPkmPa16KphgEBqUuloqm/view?usp=sharing>

Goals and Objectives for 2022-2023:

The goal is to offer Novice 2023 as an in-person event.

Things to do differently:

- TESTMOZ was great - setup to get emails to send results
 - change question 3 (was in novice handbook)
 - Make all questions multiple choice (not short answer for grading)
 - Maybe make the time longer? 90 minutes might have been too short (105 min)?
 - Have TESTMOZ send results
- Breakout ideas: Athletic Aid, ROTC, institutional aid
- Continue **Small Group guide** - add more questions
- Continue **Campus Based Funds** presentation in small group
- Send resources with Pre-Test
- Resources
 - Listservs
 - LG or SG presentation - how to navigate resources.

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.

For 2022-23 NOVICE:

- Finding additional people (chairs, large group/small group leaders) if going in-person.
- Find storage shed of NOVICE materials
- Finding location for NOVICE for June 2023.

Submitted By: Sean Sherwood and Robert Zasso

Date: 9/8/2022



George Chin Memorial Scholarship Committee

Committee Name: NYSFAAA George Chin Memorial Scholarship Committee

Committee Members:

Co-Chairs: Daniella Steuer - Region VII; JDale Berner Region II
Heather Allen; Scott Atkinson (retired) – Region II Kimberly Radcliff-Loor – Region III Mary Lou Kutchma –
Region V Theresa Donnell, Erica Follick – Region VII Stacey Hawkins – Region VIII

Summary of Activities :

Applications became available for the 21-22 award year. The committee reviewed all candidates and selected recipients (\$1,500 each). The recipients were announced during the virtual conference in October 2021. 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 2022, preparations began to release the 22-23 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. Raffle tickets once again will be sold to help with fundraising efforts.

Goals and Objectives for 2022-2023:

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 at the 2022 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: Daniella Steuer Co-Chair and J'Dale Berner, Co-Chair

Date: October 12, 2022

School Outreach and Early Awareness Committee

Committee Name: School Outreach

Committee Membership:

Gene Rogers
Amy Thompson
Patrick Ziegler
Lisa Simpson
Jeanne McCarthy
Sonya Griggs
Mike Turner

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
- Try and get back to a more normal (pre-covid) way to manage outreach
- 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

Summary of Activities:

FAFSA completion events

NYSFAAA members participated in a number of virtual FAFSA Completion events that were hosted by HESC during Fall 2021/Spring 2022 - using Zoom technology, many of these events allowed NYSFAAA volunteers to assist families complete the FAFSA. HESC hosted events almost monthly. NYSFAAA members across the state continued to provide presentations to local high schools' populations, the majority of them virtual, but a number of them had been done in person. HESC continues to host videos and information via their www.startheregetthere.org website and the ability to register for future events.

The plan for 22/23 includes NYSFAAA assisting HESC in virtual FAFSA completion events along with certain regions going back in person to local high schools that can use the more conventional way (meeting in computer labs, etc.). There is also going to be a few hybrid sessions as well. FA high school 101 nights are certainly coming back to be more "in person" again, but many NYSFAAA members have embraced technology, by recording information sessions that local high schools can use at their convenience.

Guidance Counselor Workshops

We are excited to announce that we will be hosting a Statewide Guidance Counselor workshop this coming November 4th. This will be open to all guidance counselors across the state. The event will be hosted by NYSFAAA/HESC and include NYSFAAA members as presenters on informative topics such as Professional Judgement and Understanding Offer letters.

We are also launching a "hotline" event for a few Fridays in Oct 22. Between 2pm-3pm, NYSFAAA members will be available via zoom to answer questions from guidance counselors as they assist students.

NYGEARUP

NYSFAAA continues to partner with HESC and the NYGEARUP schools.

Upcoming Meetings and Events:

As a committee, we have every other month zoom meetings.

Recommendations:

Submitted By Gene Rogers

Statewide Training Committee

Committee Members:

Linda Athearn-Forster, Kelly Kelly, Brian Smith, Robert Zasso, Perry Brown, Hali (Skaggs) Conrad, Emmett Cooper, Abby DeCastro, Maximo Flint-Morgan, Brian (Calvin) Ghanoo, Tristia AC. Kayser, Lea Nuwer, Lynn Sabulski, Robert Weinerman, Rockey Weintrob

Summary of Activities:

- The addition of the Communication sub committee has been a great success
- We have a very full slate of fall presentations

FALL 2022

September 22 – Having Fun with Taxes 1-What's new fore 23/24, and What Isn't?



Presenter: Robert Weinerman

Moderator: Brian Smith / Q&A: Robert Weinerman

Attended:

October 4 – Debt Relief and Fresh Start Initiative

Presenter: Christopher McCaghren

Moderator: Howard Leslie / Q&A: Linda Athearn-Forster

Attended:

October 7 – 2023-2024 FAFSA and TAP Application Training Annual Community Webinar

Presenter: LaSonya Griggs & Michael Tuner

Moderator: Lynn Sabulski / Q&A: Perry Brown & Emmett Cooper

Attended:

October 25-27 – NYSFAAA Conference

Registration:

November 3 – Having Fun with Taxes 2-Filing Status, Amended Returns, and Rollovers

Presenter: Robert Weinerman

Moderator: Lynn Sabulski / Q&A: Robert Weinerman

Attended:

November 18 – (SWTCTYR) FAFSA/Need Analysis changes coming in 24-25

Presenter: Christopher McCaghren

Moderator: Howard Leslie / Q&A: Linda Athearn-Forster

Attended:

November 29 – Conflicting Information, PJ, Citizenship, other eligible criteria

Presenter: JoEllen Soucier

Moderator: Trista Kayser / Q&A: Abby DeCastro

Attended:

Upcoming Projects:

- Meeting with SWT committee for future presentations
- Continue to work with other committees to request, set up, and/or any other support we can provide to continue to offer a quality education to our membership.

Future Meetings and Events:

TBA



Submitted By: Brian Smith

Date: 10/10/2022

Technology, Innovation, and Communication Committee

Committee Members:

Sean Sherwood, Sonya Stein, Joli Patel, Tanya Patterson-Stanley, Andrea Damar, Tristia Kayser, Brian Smith, Calette Fagan-Murdock, Diedre Strutz

Summary of Activities:

- Continued upkeep and posting on Facebook message board
- Successful launch of NYSFAAA Community Forum
- Training of Sean Sherwood on website administration
- Website updates

Upcoming Projects:

- Website Survey
- Continuous updates to BOT knowledge
- Continued support of SWT
- Continued updates to website

Assistance Requested from Executive Council:

- Continual update of names for committees and regional leadership, minutes, and calendar events

Future Meetings and Events:

TBA

Submitted By: Brian Smith

Date: 10/10/2022



Regional Reports

Region 1 Report

Region I Annual Report

2021-2022

1. Meetings held this year
 - September 23, 2021 via zoom
Attendees: 26
Topics and Training details: Presentation from NYSFAAA's president Adrienne King; HESC Update; Executive Council report; discussion of FAFSA nights and Fun with taxes webinar

 - November 3, 2021 via zoom
Attendees: 9
Topics and Training details: Return to repayment from Elena Lubimstev of EdFinancial; Executive Council update

 - December 16, 2021 via zoom
Attendees: 16
Topics and Training details: HESC update; Executive Council Update; FSA conference Discussion

 - February 4, 2022 via zoom
Attendees: 15
Topics and Training details: HESC update; Presentation from Government Relations committee regarding Advocacy

 - May 5, 2022 at Scoob's restaurant, Lancaster NY
Attendees Topics and Training details: 8
Topics and Training details: HESC update; Discussion of update to Federal methodology and FAFSA changes for 2024-2025

2. Other training events that Region was involved in: FSA federal updates

3. Treasury update: As of June 9,2022: \$3,940.85
4. Committee reports: N/A

5. Conference news (if your Region is involved in Conference planning) Conference 2024

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: Nicole Griffo

DATE: August 8 ,2022

Region 2 Report

Region 3 Report

Region III Annual Report

2021-2022

1. Meetings held this year

Date and Location: 10/29/2021 (remote)

Attendees: 23

Topics and Training details:

EC update, discussion of 2021 NYSFAAA virtual conference, postulation/discussion regarding membership shrinkage (membership due dates related to institution budget cycles along with traditional concurrent pay along with October conference registration), request for volunteers for upcoming FAFSA completion events. Discussed and approved providing LaSonya Griggs with ability to distribute \$10 gift cards to FAFSA completion event volunteers, not to exceed \$300.00 overall. Opened consideration of holding December meeting in-person again, at Sherwood Inn. Survey to be sent to members.

Date and Location: 12/3/2021

Attendees: 13

Topics and Training details:

Discussion of recently completed FSA virtual conference, particularly federal update regarding announced FAFSA simplification. Various specifics covered in substantial depth, example # in college not impacting SAI (formerly EFC).

Discussion of FAFSA completion events, great participation by Region III appreciated. Possible enhancement would be to offer high school counselor workshop/s. Further discussion needed, including with EC.

Date and Location: 5/4/2022 (remote)

Requested by EC rep following April EC meeting where 2023 Annual Conference topic surfaced

Attendees: 3 (Region III officers - Chair Max, Secretary Janet, EC rep Peg – Treasurer unable to attend)

Topics and Training details: Exec Council learned Region 2 unable to host 2023 Annual Conference. Requested regions to determine if they could assume host duty or partner with other region/s.



Survey sent to Region III members soliciting volunteers. 5 volunteers came forward and reported to EC at June EC meeting.

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

3. Treasury update: As of Fourth Quarter (June 2022) \$6,347.20 end of period balance.

4. Committee reports: N/A

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

Five (5) Region III individuals volunteered to support next year's (2023) conference; names and contact info referred to partner Region IV representatives

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):

Region III Treasurer retired, creating a vacancy. Replacement needed prior to customary nomination/election cycle.

SUBMITTED BY: Peg Stearns

DATE: September 14, 2022

Region 4 Report

Region IV Annual Report

NYSFAAA Exec Council Meeting

10/24/2022

1. MEETINGS held this year:

Date and Location: 2/9/22 Virtual

Attendees = 8

Topics and Training details: NYS HESC update and training

Date and Location: 3/9/22 Virtual



Attendees = 6

Date and Location: 5/25/22 Bellinis in Latham

Attendees = 12

Topics and Training details: NYS HESC update

- 2 **Other Training events that Region was involved in :** Virtual FAFSA filing workshops and High Financial Aid School Nights
- 3 **Treasury update:** Andrea Wedler reports our account balance is \$7,388.81 The only expenses this year were gift cards for the Conference Raffle and lunch meeting at Bellinis in Latham
- 4 **Committee Reports:** No committee reports
- 5 **Conference news (If your region is involved in Conference planning):** N/A
- 6 **Upcoming meetings and events:** TBD
- 7 **Regional comments/Recommendations (If your region has a pressing issue that needs to be brought to the attention of Council)** N/A

SUBMITTED BY: Rochelle Filler

DATE: 8/18/2022

Region 5 Report

Region V Annual Report

2021/22

1. Meetings held this year:

Date and Location: November 10, 2022, held viz Zoom

Topics and Training details: Two presenters from Vassar College, Michelle Quock and Erika Pappas, presented A Holistic Culturally Sensitive Based Approach to Financial Aid Counseling. They helped to break down how to be more culturally sensitive when counseling students and families.

Attendees: 14

Date and Location: December 9, 2022, held via Zoom

Topics and Training Details: Expenditure vote on cost of holiday luncheon

Attendees: 4

Date and Location: December 10, 2022, held at Buon Amici Italian Restaurant, 238 Central Ave, White Plains, NY 10606



Topics and Training Details: Holiday luncheon and discussion on helping to grow regional participation.

Attendees: 6

Date and Location: April 7, 2022, at The College of Westchester, 325 Central Ave, White Plains, NY 10606

Topics and Training Details: Kathleen Roebuck, Cognition Financial presented Confidence, Conflict and Escalation. She had some tips on how to calm stress and be confident in the workplace. Anne Traverso, SoFi, presented Effective Communication when Engaging Students. She reviewed different tactics to get students more engaged in the communications your office sends.

Attendees: 14

Date and Location: June 9, 2022, held via Zoom

Topics and Training Details: HESC update with Lisa Simpson and Michael Turner. Discussion on putting together a Tri-Regional Meeting with Regions 6 and 7 in Manhattan in the coming 2022-2023 academic year.

Attendees: 21

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

3. Treasury update:

As of October 5, 2022: \$8,854.18

New Treasurer – Ben Loya, Earnest

4. Committee reports: N/A

5. Conference news:

We are helping with next year's Conference in Albany, NY. Lisa Simpson (HESC) is helping secure the hotel and also helping with planning.

6. Upcoming meetings and events:

We are planning on having a meeting before the end of the Fall semester and may combine it with a holiday luncheon. We're also working to put together a Tri-Regional meeting in Spring 2023 with Regions 6 and 7 in Manhattan.

7. Regional comments/recommendations:

New Region V, Executive Council Representative – Janice Hilbrink, Pace

We're working to send out a survey to help understand how we can better serve our region and get more participation from existing and potential new members.

SUBMITTED BY: Janice Hilbrink

DATE: 10/5/22



Region V Annual Report

2021/22

1. Meetings held this year:

Date and Location: November 10, 2022, held viz Zoom

Topics and Training details: Two presenters from Vassar College, Michelle Quock and Erika Pappas, presented A Holistic Culturally Sensitive Based Approach to Financial Aid Counseling. They helped to break down how to be more culturally sensitive when counseling students and families.

Attendees: 14

Date and Location: December 9, 2022, held via Zoom

Topics and Training Details: Expenditure vote on cost of holiday luncheon

Attendees: 4

Date and Location: December 10, 2022, held at Buon Amici Italian Restaurant, 238 Central Ave, White Plains, NY 10606

Topics and Training Details: Holiday luncheon and discussion on helping to grow regional participation.

Attendees: 6

Date and Location: April 7, 2022, at The College of Westchester, 325 Central Ave, White Plains, NY 10606

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Attendees: 14

Date and Location: June 9, 2022, held via Zoom

Topics and Training Details: HESC update with Lisa Simpson and Michael Turner. Discussion on putting together a Tri-Regional Meeting with Regions 6 and 7 in Manhattan in the coming 2022-2023 academic year.

Attendees: 21

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

3. Treasury update:

As of October 5, 2022: \$8,854.18



New Treasurer – Ben Loya, Earnest

4. Committee reports: N/A

5. Conference news:

We are helping with next year's Conference in Albany, NY. Lisa Simpson (HESC) is helping secure the hotel and also helping with planning.

6. Upcoming meetings and events:

We are planning on having a meeting before the end of the Fall semester and may combine it with a holiday luncheon. We're also working to put together a Tri-Regional meeting in Spring 2023 with Regions 6 and 7 in Manhattan.

7. Regional comments/recommendations:

New Region V, Executive Council Representative – Janice Hilbrink, Pace

We're working to send out a survey to help understand how we can better serve our region and get more participation from existing and potential new members.

SUBMITTED BY: Janice Hilbrink

DATE: 10/5/22

Region 7 Report

Region VII Annual Report

2021-2022

1. Meetings held this year

Date and Location: 10/26-10/28 Fall Conference

11/19/21 State Wide Training and Regional Meeting (ZOOM)

Topic: Advocacy

2/8/22 Region VII Meeting (ZOOM) 17 Attendees

Topic: Executive Council Update, HESC Update and Info about Fall Conference

2/25/22 State Wide Training and Regional Meeting (ZOOM)

Topic: Scholarship Strategies

3/23/22 Region VII Meeting (ZOOM) 37 Attendees

Topic: HESC Update with Michael Turner and Lisa Simpson, Round Table Discussion how institutions are serving students

Working on planning a Tri-Regional Meeting with regions 5 and 6 for September



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

3. Treasury update: As of September 9th, 2021, \$4775.26,
As of June 2022, \$5,205.26.
4. Committee reports: N/A

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

6. Upcoming meetings and events: Working on planning a Tri-Regional Meeting with regions 5 and 6 for September

7. Regional comments/recommendations : N/A

SUBMITTED BY: Erica Follick

DATE: Jun 3, 2022

Region 8 Report

Region VIII Annual Report

2021-2022

1. Meetings held this year:

Date and Location: June 10, 2022 (High Peaks Resort, Lake Placid)

Attendees = 20: 12 (in person) + 8 (virtual)

Topics and Training details: HESC update & Conference planning

Date and Location: March 22, 2022 (Virtual)

Attendees = 22

Topics and Training details: Conference planning overview; HESC updates and Q&A

Date and Location: January 20, 2022, virtual

Attendees = ~15

Topics and Training details: Conference planning: chair updates & budget review

Date and Location: December 14, 2021; hybrid meeting (High Peaks Resort, Lake Placid)

Attendees = 18

Topics and Training details: Conference site tour; HESC Update from Mike Turner

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

3. Treasury update: As of August 1, 2022: \$3,461.68



4. Committee reports: N/A

5. Conference news: Region 8 is hosting the 2022 NYSFAAA Conference at the High Peaks Resort in Lake Placid on October 25-27. A robust and diverse program has been planned. Registration opened in early July and as of August 25th, 84 registrants have signed up. The Entertainment committee is working on fun events to make the conference personally satisfying, in addition to professionally rewarding.

6. Upcoming meetings and events: The next region meeting is scheduled for September 16, 2022 at the High Peaks Resort, Lake Placid.

7. Regional comments/recommendations: N/A

SUBMITTED BY: Sonya Stein

DATE: August 31, 2022



*New York State Financial Aid
Administrators Association*