

NYSFAAAA Executive Council  
Remote Meeting  
October 25, 2021  
Time: 9:00 AM to 12: PM and 1:00 PM to 4:00 PM

**Call to Order & Roll Call**

**Adrienne King/Anne Sullivan Polino**

President – Adrienne King  
Past President - Howard Leslie  
1<sup>st</sup> Vice President – Renee Swift  
2<sup>nd</sup> Vice President – Brian Smith  
Secretary – Anne Sullivan Polino  
Treasurer – Shalena Clary  
Past Treasurer- Susan Godreau  
Region 1 – Lea Nuwer  
Region 2 – BJ Revill  
Region 3 – Patti Donahue  
Region 4 – Rochelle Filler  
Region 7 – Clair Jacobi  
Region 8 – Stacey Hawkins

Guests:

Taylor Kreutter  
Nicole Griffio  
Lucinda Snyder  
Peg Sterns  
Sean Sherwood  
Lisa Simpson  
Debra Evans  
Jeanne McCarthy  
Sonya Stein

The meeting was called to order at 9:04 AM with a quorum

**Discussion via Email**

**MOTION:** A motion was made by Patti Donahue, seconded by Joe Weglarz to approve the attachment (see exhibits) for submission to Legislators in support of H.R. 4631 "Protecting Our Students by Terminating Graduate Rates that Add to Debt (POST GRAD) Act".

Revised Motion:

A motion was made by Patti Donahue, seconded by Lea Nuwer to approve the attachment ( see exhibit) for submission to Legislators in support of H.R. 4631 "Protecting Our Students by Terminating Graduate

Rates that Add to Debt (POST GRAD) Act" with the addition of the Graduate PLUS loan program language as follows:

Today's employment market demands many more positions be filled by individuals holding advanced graduate and first professional degrees. Students pursuing these advanced degrees have very limited funding options other than student loans. **Currently, the federal student loan programs available are the Direct Unsubsidized Loan Program and the Graduate PLUS Loan Program, both of which accrue interest while the student is still attending school.** This interest accrual costs individual students' tens of thousands of dollars in additional interest and payments over the repayment period of the loan.

Discussion followed where the following points were made:

Lea Newer recommended adding information on Grad PLUS since that program is another funding option for Grad students and include information about the terms and conditions (i.e. higher interest and origination fee rates)that would help to drive home the points already made in the letter.

The motion passed with 14 in favor, no opposition and no abstentions.

**MOTION:** A motion was made by Clair Jacobi, seconded by Rochelle Filler to award Howard Leslie the NYSFAAA Lifetime achievement award.

There was no discussion

A vote was called and the motion passed with 11 in favor, no opposition, and 2 abstentions.

**MOTION:** A motion was made by Patti Donahue, seconded by Joe Weglarz to make a motion to award John Curtice the NYSFAAA Lifetime Achievement Award.

There was no discussion

A vote was called and the motion passed with 11 in favor, no opposition, and 2 abstentions.

**MOTION:** A motion was made by Brian Smith, seconded by Howard Leslie, that the Statewide Training Committee move forward with preparations to do training on the Annual Student Loan Acknowledgment (ASLA) tool to the NYSFAAA membership at the November 12<sup>th</sup> Virtual Regional Meetings.

There was no discussion

A vote was called, and the motion passed with 13 in favor, no opposition, and no abstentions.

<b>Approval of Minutes</b>	<b>King/Polino</b>
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Approval of Minutes

**MOTION:** A motion was made by Lea Nuwer, seconded by Howard Leslie to accept the Minutes of the August 2021 Executive Council Meeting with one minor edit.

A vote was called, and the motion passed with all in favor.

Adrienne King went on to welcome new members of the Executive Council and recent election winners, including:

- President-Elect Patti Donahue
- Treasurer-Elect Taylor Kreutter
- Region 1 Councilperson Nicole Griffo
- Region 2 Councilperson Lucinda Snyder
- Region 3 Councilperson Peg Stearns
- Region 8 Councilperson Sonya Stein

Region 7 is also welcoming a new councilperson Samantha Silva

<b>President's Report</b>	<b>King</b>
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Adrienne King provided the following report.

- EASFAA -Fall Meeting

Adrienne King and Howard Leslie attended the EASFAA Fall Meeting in Baltimore, the venue for the Spring conference to be held from May 15 to May 18, 2022 at the Baltimore Inner Harbor Hilton. The Conference fee will be reduced to \$460.

The 2023 Conference will be held in in Manchester, N.H.

EASFAA recently canceled their social media contract as part of their move back to in person meetings.

A call for presentations will be going out to membership for the upcoming conference.

The EASFAA President-Elect is looking to update the Policy and Procedures and Technology Committee. As part of the Policy and Procedures update, EASFAA is looking to use the relaxed version of Roberts rules

EASFAA also is likely to continue NASFAA Credential training. Other state organizations will be continuing with this training NYSFAAA will not be joining in this initiative. Many state organizations are still concerned with COVID related issues.

EASFAA next date will be sometime in the Spring

- TAP Regulation Working Group

A New York State TAP Regulations Working Group meeting was held virtually on October 13, 2021. This group includes members for NYSED, SUNY, CUNY , non-profit and for-profit Colleges, that include a number of Executive Council members. Guests at this meeting included three members from the Office of Budget Management.

Discussions were held on the timing of students' declaration of a major, foreign college transcript, and COVID 19 impact on NYS aid programs. The topic of vaccine mandates also was discussed.

<b>Past President's Report</b>	<b>Leslie</b>
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**Page 4 of 25**

Howard Leslie began his report by welcoming newly elected members of the Executive Council.

He also announced that he will be conducting a session on ethics in financial aid during this year's NYSFAAA Conference.

- **Governance and Ethics**

Howard provided the following update on the Governance and Ethics Committee

NYSFAAA COMMITTEE REPORTS

Governance and Ethics

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.

- **Elections**

Howard provided the following update on the Elections Committee.

Committee Members

Region 1 - Nicole Griffo, 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

Taylor 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.

Finally, Howard acknowledged that this is his last Executive Council meeting and that he has been a member of the Council for 12 of the last 15 years. He expressed his pleasure and an honor at being a member of this organization and wished the newcomers to the Council only the best. Bon Voyage.

Adrienne King thanked Howard for his service and knows we will see him around NYSFAAA in the future.

<b>First Vice President's Report</b>	<b>Swift</b>
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Renee Swift provided the following report

- **Membership**

Update on membership: 1056 active members per the MemberClicks dashboard; per the EC minutes from October 2020, there were 783 active members. Discovered a small glitch with regard to members being able to subscribe to their regional listserv. An email went out to the membership asking them to look at their profile to confirm enrollment in the statewide listserv and their regional listserv (if they want to opt in). Members were referred to Howard and Lea for assistance.

Membership committee met on September 23. Only two member reps attended. We did discuss plans to review and update the membership application for the 2022-23 cycle. In addition, I sent out lists of lapsed members to each regional rep for them to review the lists. Plan is to remove those that have been confirmed as “out of the business” from receiving future communications. Also emailed the regional chairs their respective lists of members who attended Novice training so that regular communication and engagement can continue with our newest financial aid professionals.

- **Mentorship Committee**

Renee recognized Taylor Kruetter as a committee of one as the remaining member of the committee stepped down due to lack of activity. It is believed that the Novice Conference will be the best option for connecting with individuals. Taylor plans to ask someone to step in as chair of this committee as she is joining the Executive Council as Treasure-Elect.

<b>Second Vice President's Report</b>	<b>Smith</b>
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Brian Smith provided the following Second Vice President's Report.

- **TICC**

- To: NYSFAAA Executive Committee

- From: TICC Social Media Sub-Committee:

- Tanya Patterson-Stanley, NYIT College of Osteopathic Medicine
- Sean Sherwood, Binghamton University
- Sonya Stein, Paul Smith's College

- Date: Tuesday, October 19, 2021

- Re: NYSFAAA's Social Media Presence

TICC has been tasked with increasing NYSFAAA's social media presence. To determine the best method to do so, a sub-committee was formed to analyze the feedback from a recent social media related membership poll and research on industry best-practice. Based on available information and current resources, the TICC sub-committee recommends focusing and building NYSFAAA's Facebook presence through the use of regularly scheduled posts on their public page and implementing a private members-only group.

- Platforms and Audience

- In August 2021, TICC distributed a membership survey to gauge interest in expanding NYSFAAA's social media presence. The majority of respondents (68%) use Facebook regularly. We recommend focusing our increased social-media presence on Facebook to meet members where they are and to expand to other platforms once we're successful on Facebook.
  - Furthermore, national data shows a majority of people between the ages of 18-65 use Facebook which further proves it to be a compelling platform for engaging individuals most likely interested in NYSFAAA (<https://khoros.com/resources/social-media-demographics-guide>).
- The sub-committee recommends we increase the number of announcements shared through our Facebook post. Based on national best-practices, social media marketing for associations is an essential part of digital marketing to boost membership engagement. The rule of thirds is recommended: one third of posts should promote member benefits, one third should be interacting with members, and one third should be sharing industry news, tips, and informative content our members would benefit from. NYSFAAA's social media content should be focused on our membership with the majority of posts applicable to financial aid administrators and the rest focused on interests of our associate members, including but not limited to vendors and other college-access colleagues. Although non-members (ex: students' parents, etc.) may follow our public page, content will be geared toward members. Members may then engage students directly versus NYSFAAA developing content geared toward other audiences. The sub-committee will work on drafting a social media calendar to assist in scheduling posts throughout the year.
- Members-Only Content
    - In the August poll, 81% of respondents wanted access to a members-only platform. Since the majority of respondents are already on Facebook regularly, the sub-committee recommends expanding NYSFAAA's social media presence through the creation and moderation of a private Facebook group. The NYSFAAA members-only Facebook group will be a convenient place for current Facebook users to network, ask questions, and share industry-related content with other members. Unlike NYSFAAA's public Facebook page which is open to both members and non-members (including students, parents, and other community members), NYSFAAA's Facebook group will be private and limited to current members only. This privacy creates a highly targeted environment for increasing member engagement opportunities. It is not meant to replace other NYSFAAA communication methods and will coexist with list-serves, other social media pages, and the Member Clicks community forms if/when implemented. The TICC committee will manage the rules for group members to ensure civil and respectful dialogue but will largely allow members to engage together informally and with minimal moderation of conversation. A Facebook Group can be quickly and easily archived if NYSFAAA or the TICC committee decides to end the group for any future reason.

- In conclusion, the TICC sub-committee plans to immediately increase NYSFAAA's social media

presence through a more consistent and targeted use of its existing Facebook page and the implementation of a private, members-only Facebook group. Content will be tailored with the primary goal of serving NYSFAAA members. Once Facebook is being utilized regularly and successfully, TICC will reconsider expanding to other platforms.

The Committee also brought the following proposal to the Council for consideration

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### NYSFAAA

#### Member Clicks Community Forum (MCCF)

#### Proposal

The survey to the community indicated that they would like NYSFAAA to have a presence in the public platforms, but even more so, the indicator was to have both the public platforms and something on the website.


As co-chair of the TICC, I broke the team into two groups. Some of us are pursuing the public forums and will soon have a proposal. The group I landed in is pursuing MCCF and it is something we can launch almost overnight with EC's approval.

MCCF can be found right on the home page:

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[Manage Your Membership](#) | [My Profile](#) | [Event Calendar](#) | [My Community](#) | [Community Forum](#)  
[Training Registration](#) | [Submit an Event](#) | [Member Search](#) | [EmpireChat](#)

**Community Forum**


Welcome Howard Leslie  
Last visit was 10/14/2021 03:23:11 PM 

Board Index	Latest Posts	Forum Profile	My Posts	Pending Posts
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**Discussion forum**

Forums	Topics	Posts	Last Post
 <a href="#">Discussion Forum</a>	0	0	

**Board Statistics**

 Total Categories: **3** Total Forums: **1** Total Threads: **0** Total Posts: **0**

Members are the only people who can access this, so its purpose is strictly an internal communication tool that is far superior to the e-list/emails.

**Page 8 of 25**

The idea is for people to start Discussion Groups regarding the issues of the day that concern most if not all of us.

Our team met and is making the following recommendations for launching, oversight, and promotion.

1. Set-up of the MCCF will be completed by Howard/Lea with assistance from MC as needed.
  - a. This can be done very quickly with approval from EC.
2. We decided that we would not use High Monitoring – that would stop every post for approval.
  - a. High Monitoring would require every submission to be approved by an administrator.
  - b. Low Monitoring is having an administrator keep an eye on the posts and being able to delete post and remove access should content be extremely inappropriate.
    - i. A policy must be written and distributed.
  - c. In addition, we agreed that we would need multiple people to monitor the MCCF posts
    - i. Several TICC members have already volunteered
3. Launching can be as easy as sending an email communication advising the community as to:
  - a. What MCCF does
  - b. How to use/join/navigate
  - c. Additional, follow-up, communications would likely be needed
  - d. Set an announcement on both home pages
  - e. Committee members have a plethora of ideas of how this can be promoted. This does not have to be discussed here.
4. To get things started we would create conversations for people to join. Recommended conversation discussed:
  - a. Newbies
  - b. Oldies
  - c. Conference
  - d. Training
  - e. Default Management
  - f. FAFSA Simplification/New formulas
5. People who opt in can see their messages on the website and/or receive them in the email box of their liking.
  - a. Unlike the e-list – MCCF will keep a trail of the conversation, and
  - b. Will only be involving members who opt in to the function and the conversations of their choice.



The above is not written in stone and input is desired.

We have a wonderful functionality in MCCF that we are paying for. I move that NYSFAAA Launches Promotes and Maintain/Monitor the Member Clicks Community Forum.

Respectfully submitted,

Howard Leslie

Co-Chair TICC

Howard Leslie and Sonya Stein manage NYSFAAA's social media presence and are looking at best practices for engaging social media to drive engagement. Memo will focus on a private member only, Facebook account.

Patti Donahue asked if this initiative is the same vehicle as the community forum through MemberClicks. Howard indicated that it is a different vehicle and may be in competition with MemberClicks.

Howard indicated that this proposal is not to use high monitoring feature which requires every post to be reviewed prior to posting. This proposal would involve a low monitoring looks at words and will remove things that are deemed inappropriate.

A discussion ensued on the differences in platforms including membership requirements, privacy, rules of behavior, value in helping to drive membership, 501C (3) concerns, solicitation rules, monitoring and cost.

Facebook (FB) is equivalent to MemberClicks Community Forum (MCCF) but can FB have the same subgroups as MCCF. Per Sonya - there is not a way to have subgroups but you can have conversation threads that would be saved.

**MOTION:** a motion was made by Howard Leslie, seconded by Brian Smith to adopt/launch MemberClicks Community Forum as well as Facebook Social Media Platform for the Association as outlined in the submitted proposal.

The motion passed with 11 in favor, no opposition and 1 abstention.

Brian thanked Howard and Sonya for putting this proposal together.

- **SWT**

The following information was reported by the Statewide Training Committee

- 1000+ registrants were made for the FAFSA/TAP Webinar, 950 attended. Additionally, there were 254 hits for FAFSA video.
- Verification and Taxes Part 2 had 250+ registrants and 82 hits on the video.

- The Regional meeting adjunct panel plan will need more time to organize. The panel will discuss movement back into repayment. The Committee would like to include one person from each sector to participate. Howard will volunteer for the panel for the Proprietary Sector.

<b>Secretary's Report</b>
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<b>Polino</b>
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- Annual Report

Anne Sullivan Polino reported that the report is complete and posted to the website for membership to review. She thanked Councilmembers who provided their report sections on time.

<b>HESC Update</b>
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<b>Simpson</b>
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Lisa Simpson reported that she and Mike Turner are scheduled to present an update on HESC Activities at the NYSFAAA Conference on October 26. The following highlights were reported to the Council. Lisa recommends attendance at the NYSFAAA session for the full update.

There are currently 2,223 opened TAP and STEM applications.

The system cannot carry four years of applications at once so 2019 is closed. 2021, 2122, 2223 are open.

TAP information is forthcoming soon

STEM applicants won't be seen until everything is complete and accepted. Private schools have lottery. SUNY and CUNY will be given the information as soon as ready. There is no lottery for these schools.

Certifications and corrections on accounts should be done earlier to avoid errors and penalizing students.

Lisa will also discuss a new platform plan at the Conference. An RFP is going out to a group that is interested in providing a system to streamline applications and processing of state aid in early 2022. HESC is putting together a focus group that includes financial aid, bursars and registrars from all sectors and financial aid processing systems.

Outreach – FAFSA completion events will be held. - one on November 4 in Region 4 for two schools in Albany area and a second session on November 18. Volunteers are needed.

A session was held on October 20 –with 125 registered and a 50% show rate. All FAFSA events are open to all schools. The group hopes to hold two or three more sessions in December through a partnership with HESC and NYSFAAA.

Renee Swift asked Lisa if there has been talk about allowing the TAP application to allow multiple schools. Lisa indicated that this would be problematic because HESC wouldn't know which school to use but agreed to bring it back to the committee for consideration. One issue is that students don't realize that they need to update the school to the final school for processing purposes. It would also likely be an issue with prepayments because all schools would get prepayment.

## NYSFAAA Balances as of 10/24/2021

## Bank Accounts

004 Key Bank	\$237,511.30
006 Key Bank Scholarships	\$33,013.17
<u>007 Key Bank CD</u>	<u>\$52,983.34</u>
Total	\$323,507.81

## Morgan Stanley

	Current Value (10)	January 1, 2021	Difference
Reserve Fund	\$411,292.92	\$392,545.66	(\$18,747.26)
Scholarship	\$309,624.55	\$295,509.66	(\$14,114.89)

September is the first month in 2021 that there was a small loss in both reserve fund and scholarship accounts.

Shalena also reported that we saw a slight drop in our investment account for the first time in September due to market fluctuations.

The following Budget information was also presented.

## NYSFAAA, Inc.

Budget vs. Actuals: 2021-2022 NYSFAAA Final - FY22 P&amp;L

July 2021 - June 2022

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
<b>Income</b>				
102 Dues	72,165.00	77,000.00	-4,835.00	93.72 %
104 Training/Workshop/ProfDev	3,780.00	6,415.00	-2,635.00	58.92 %
106 Annual Conference Inc	13,605.00	12,500.00	1,105.00	108.84 %
107 Novice Workshop Inc	0.00	66,000.00	-66,000.00	0.00 %
110 Interest Income	0.83	80.00	-79.17	1.04 %
304 NYSFAAA Scholarship Inc	5,560.00	4,000.00	1,560.00	139.00 %
<b>Total Income</b>	<b>\$95,110.83</b>	<b>\$165,995.00</b>	<b>\$ -70,884.17</b>	<b>57.30 %</b>
<b>GROSS PROFIT</b>	<b>\$95,110.83</b>	<b>\$165,995.00</b>	<b>\$ -70,884.17</b>	<b>57.30 %</b>
<b>Expenses</b>				
501 Executive Council Administration				
501A Revenue Sharing	520.00	11,000.00	-10,480.00	4.73 %
501B Professional Services	3,878.31	11,000.00	-7,121.69	35.26 %
501C General Executive Council		3,700.00	-3,700.00	
501D Executive Council Meetings		7,500.00	-7,500.00	
501E Special Meetings		9,200.00	-9,200.00	
501F Bank Service Charge	1,901.90	850.00	1,051.90	223.75 %
501G Credit Card Fees		5,000.00	-5,000.00	
<b>Total 501 Executive Council Administration</b>	<b>6,300.21</b>	<b>48,250.00</b>	<b>-41,949.79</b>	<b>13.06 %</b>
504 Awards Committee				
504 Awards Committee		2,150.00	-2,150.00	
507 Communications Committee				
507 Communications Committee	1,283.04	1,200.00	83.04	106.92 %
507A Website		13,655.00	-13,655.00	
<b>Total 507 Communications Committee</b>	<b>1,283.04</b>	<b>14,855.00</b>	<b>-13,571.96</b>	<b>8.64 %</b>
509 Mentoring Committee				
509 Mentoring Committee		1,000.00	-1,000.00	
510 Professional Development				
510A Statewide Training		12,500.00	-12,500.00	
510F Training/Workshop/PD Expenses	7,000.00		7,000.00	
<b>Total 510 Professional Development</b>	<b>7,000.00</b>	<b>12,500.00</b>	<b>-5,500.00</b>	<b>56.00 %</b>
511 Annual Conference				
511 Annual Conference		12,500.00	-12,500.00	
512 Novice Training Exp				
512 Novice Training Exp	416.00	66,000.00	-65,584.00	0.63 %
538 Diversity Committee Expenses				
538 Diversity Committee Expenses		1,140.00	-1,140.00	
700 NYSFAAA Scholarship				
700A Scholarship Committee		7,600.00	-7,600.00	
<b>Total 700 NYSFAAA Scholarship</b>		<b>7,600.00</b>	<b>-7,600.00</b>	
<b>Total Expenses</b>	<b>\$14,999.25</b>	<b>\$165,995.00</b>	<b>\$ -150,995.75</b>	<b>9.04 %</b>
<b>NET OPERATING INCOME</b>	<b>\$80,111.58</b>	<b>\$0.00</b>	<b>\$80,111.58</b>	<b>0.00%</b>
<b>NET INCOME</b>	<b>\$80,111.58</b>	<b>\$0.00</b>	<b>\$80,111.58</b>	<b>0.00%</b>

Highlights include:

- Dues are close to budget.
- Conference income exceeded expectation.
- Loan Bootcamp came in lower than anticipated and effected income on training workshops and professional development.
- Under Professional Services - insurance expense is higher than in the past. A review of options found prices are up in general.

**MOTION:** A motion was made by Rochelle Filler, seconded by Patti Donahue to accept the Treasurer's Report as presented.

A vote was taken, and the motion passed with all in favor. .

<b>Conference 2021</b>	<b>Evans/McCarthy</b>
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Jeanne McCarthy and Debbie Evans indicated that there are 390 attendees. They were hoping for 400+. Forty-nine individuals are attending for free and part of the Novice program, leaving 341 paid registrations. There are fifty-three with outstanding balances.

The conference platforms will be WHOVA and Zoom. Sean Sherwood will review these systems with Council at this meeting.

Capacity should not be an issue as the general sessions have a capacity of 1000 and 100 at breakout sessions All sessions will be recorded.

The Committee thanked Lea Nuwer for getting survey ready to go. The survey will go out on Friday with results reported at the December Executive Council meeting.

Debbie reported that the Scholarship Committee will provide 5 recipients. The Committee had trouble getting applications this year. Regional meetings should provide a mechanism for identifying this opportunity and encouragement to get students to apply. It was also reported that some individuals had an issue with the website allowing a second donation.

At this point, fund raising is dismal as compared to last year. There are 45 raffle tickets and 35 50/50 tickets. Total to date is \$1,900 compared to over \$5,000 last year. Business partners and others helped with last year's numbers.

Howard reported that there are 9 people who donated \$100 each as strictly donations.

Hopefully, next year the conference will be in person and committee will need help with gathering donations. Debbie indicated that she is stepping aside and won't be there to assist. She also reminding the group that there are still cookbooks available for sale.

Adrienne thanked Debbie for her work on the Scholarship Committee

Jeanne and Debbie also provided an update on the outstanding hotel deposit. The Hilton in Long Island is still holding the \$21,450 deposit. Debbie has made several attempts to resolve this issue only to be ignored.

Four options are available to us. .

1. We take no further action and lose the \$21,450 deposit.
2. We attempt to negotiate to use the credit for future meetings (Novice, EC, etc.)
3. We hire an attorney to recover the funds. Debbie's state representative provided some options for free legal advice
4. We engage media to bring this issue to the public's attention and the lack of empathy from Blue Sky given we've been trying to negotiate since last December when we were told it was too soon for them to

make a decision and are now indicating that it should have been done within 6 months. We did try to get a response within that timeframe. Blue Sky indicated that the NYS Attorney General must provide a letter saying that mass gatherings are not allowed. Within two days of getting the letter the Attorney General opened up the state.

The pros and cons of using social media to help resolve this issue was discussed. Debbie will provide Adrienne with a summary of the events for continued follow up.

Sonya Stein and Stacey Hawkins, 2022 Conference Committee Chairs were told that the hotel in Lake Placid will work with them on accommodating changes because of the pandemic. It was agreed that contracts should include language on this topic going forward.

Debbie looking forward to the conference and thanks all for their help and expressed her thanks for support.

Adrienne thanked Jeanne and Debbie for being the only committee for having two conferences in a year and virtual conferences.

Debbie and Jeanne also thanked the technical people for finding the platforms and making them work and being patient and kind with training and making people comfortable with the technology.

<b>Conference 2022</b>	<b>Hawkins/Stein</b>
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Stacey Hawkins and Sonya Stein provided the following update on the 2022 Conference.

The theme and logo are finalized and will be shared through a promotional video, put together by Sonya, at end of this year's conference.

Stacey also added some questions to survey about format of conference – in person or virtual, with the hope that we can make a decision soon on the format.

<b>NYSFAAA Conference - WHOVA</b>	<b>Sherwood</b>
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Sean Sherwood provided a demonstration of the WHOVA conference portal/system and process. Countdown clock will change to "Tech Support" once the conference starts.

Adrienne and Howard thanked Sean for his hard work in organizing this technical side of the conference.

BREAK UNTIL 1 PM      Returned to meeting at 1:08 PM with a quorum

<b>Regional Reports</b>	<b>King</b>
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See Exhibits

<b>Old Business</b>	<b>King</b>
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Adrienne thanked all members leaving the council for their work and hope to see them next year.

<b>New Business</b>	<b>King</b>
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None

<b>Next Meeting</b>	<b>King</b>
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December 13, 2021 – virtual morning meeting

<b>Adjournment</b>	<b>King</b>
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**MOTION:** A motion was made by Howard Leslie, seconded by Susan Godreau to adjourn the meeting at 1:31 PM.

Adrienne thanked all Council members leaving the Executive Council for their service.

A vote was taken with all in favor.

Exhibits

Dear (*Legislator title/ name*),

The New York State Financial Aid Administrators Association (NYSFAAA) expresses its strong support of 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.

Today’s employment market demands many more positions be filled by individuals holding advanced graduate and first professional degrees. Students pursuing these advanced degrees have very limited funding options other than student loans. Currently, the federal student loan programs available are the Unsubsidized Direct Loans that accrue interest while the student is still attending school. This interest accrual costs individual students tens of thousands of dollars in additional interest and payments over the repayment period of the loan.

Some of the highest amount of student loan borrowing occurs in the licensed profession fields, many of which are in the greatest demand, like in healthcare. Sadly, the expense of borrowing alone can be the determining factor as to whether a student ultimately decides to pursue a profession requiring an advanced degree.

The POST GRAD Act would give students some relief by granting access to Subsidized Direct Loan funds, which would lessen the amount of interest accrued over the life of the loan. This proposed legislation is not a new concept. Prior to 2011 graduate and first professional students had access to Subsidized Federal Direct Student Loan funds with their more favorable terms. Students lost their access to these funds as part of Congressional negotiations for passage of the 2011 Budget Control Act.

We applaud Representative Judy Chu for introducing this much needed piece of legislation and hope that you also see the need to support its passage. If you have any questions, please contact Adrienne King, NYSFAAA President. She may be reached at [aking@bankstreet.edu](mailto:aking@bankstreet.edu)

Sincerely,



Regional Reports

Region 1 Report  
NYSFAAA Exec Council Meeting  
10/25/2021

**1. MEETINGS SINCE LAST EXEC COUNCIL MEETING**

Date and Location: September 23, 2021, Virtual, 27 participants

Topics covered: Welcome from President King, Exec Council report, HESC Update, FAFSA Night discussion, Fun with Taxes webinar discussion

**2 Other Training events in which the Region was involved:**

**Example – CGNY, Guidance Counselor workshop?** none

**3 Treasury update:** \$3780.79

**4 Committee Reports:**

Election Committee: looking for a new Secretary, Nicole Griffo will be the new Region 1 Rep

Membership Committee: looking for creative ways to increase membership (see #7 below)

Awards Committee: Nominations have been submitted

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

**6 Upcoming meetings and events:** November 3, 2021

**7 Regional comments/Recommendations (If your region has pressing issues that need to be brought to the attention of Council):** Can members pay for services that they need (such as verification training for only those in the office that perform verification)? Can members pay a conference fee, that would include membership? Welcome back discount for former members? Institutional fee (equal to the cost of 5 memberships when there are 5 or more members)?

Submitted 10/4/21

By Lea Nuwer

Region 2 Report  
NYSFAAA Exec Council Meeting  
Date 10/25/2021

**1. MEETINGS SINCE LAST EXEC COUNCIL MEETING**

Date and Location: 10/15/21

Attendees = 25-ish

Topics and Training details: *Standard Business Meeting, HESC Update, Round Table Discussions (Conference 21, HEERF, ideas for treasury)*

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

Example – CGNY, Guidance Counselor workshop?

**3. Treasury update: \$6,842.41**

**4. Committee Reports: N/A**

**5. Conference news (If your region is involved in Conference planning): N/A**

**6. Upcoming meetings and events: 11/4/21 (NYSFAAA Training)**

**7. Regional comments/Recommendations (If your region has a pressing issue that needs to be brought to the attention of Council): N/A**

# Region 3 Regional 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: 3/12/21 (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:

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.

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.

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 Representative: 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:

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

10/29 - Remote Region 3 meeting to decompress after Conference and discuss what was learned as well as provide any feedback.

December 2021 - Regional members want to plan for an in-person December meeting at a Restaurant for Christmas. TBD

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 (revised 10/25/21)

Region IV Report  
NYSFAAA Exec Council Meeting  
Date 10/25/2021

1 **MEETINGS SINCE LAST EXEC COUNCIL MEETING**

**Date and Location:** None

**Attendees:** N/A

**Topics and Training details:** N/A

2. **Other Training events that Region was involved in :** Numerous HS Financial Aid nights around the region
3. **Treasury update:** Andrea Wedler reports account balance of \$7,633.81 Gift cards for Conference Raffle was the only recent expenditure.
4. **Committee Reports:** Membership Committee - Stacey Block – Contacting members who have let membership lapse and encourage renewal.
5. **Conference news (If your region is involved in Conference planning)** N/A
6. **Upcoming meetings and events:** November 10, 2021 and December 8, 2021
7. **Regional comments/Recommendations** No issues for Executive Council

# 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 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 VIII Report

## NYSFAAA Exec Council Meeting

### Date

**1. MEETINGS SINCE LAST EXEC COUNCIL MEETING- Total of 3 meetings this year**

Date and Location: October 7<sup>th</sup> 2021-Virtual

Attendees =26

Topics and Training details:

- \*Conference theme/logo discussion
- \*Raffle items for 2021 conference
- \*Regional Positions/Committee updates
- \*2022 Conference concerns

**2. Other Training events that Region was involved in : Example – CGNY, Guidance Counselor workshop? N/A**

**3. Treasury update: Nicole Adner reported 4004.02**

**4. Committee Reports: Executive Council update; NOVICE Update; TIC & website Update; SWT Update**

**5. Conference news:**

- \*Theme- “The Best View Comes After The Hardest Climb”
- \*Logo- Design by K. Fuller- SUNY Canton
- \*Video teaser to be presented at the end of the 2021 conference for 2022 in Lake Placid
- \*Added questions to the conference survey for 2021- Concerns regarding schools budgets and interest in an in person event?

**6. Upcoming meetings and events: meeting TBD slated for November for conference planning**

**7. Regional comments/Recommendations (If your region has a pressing issue that needs to be brought to the attention of Council) N/A**