Greetings & Introductions

Members Present:
Heather Allen, SUNY Brockport; Scott Atkinson, SUNY Brockport; Joseph Bailey, GCC; Myles Baker, Jr, EBI; Nora Bell-Owens, SUNY Brockport; J’Dale Berner, ProEducation Solutions; Katherine Brown, GCC; Melissa Casselman, Nazareth College; Margaret Christian, University of Rochester; Cynthia Davis, Nazareth College; Corinne Franklin, RIT; Michael Friedman, ASA; Laura George, SUNY Alfred; Jane Gilliland, SUNY Alfred; Colleen Hathaway, Keuka College; Jonathan Heininger, SUNY Geneseo; Derek Hudson, Nazareth College; Laura Knowles, EBI; Sandra Killeen, Nazareth; Cindy Kohlman, Inceptia; Marcie Krause, Roberts Wesleyan College; Sylvia Mendez, MCC; B.J. Revill, University of Rochester; Vince Scalise, ASA; Tonia Risse, SUNY Brockport; Janice Scheutzow, Nazareth College; Deidre Strutz, RIT; Jon VanBlargan, FLCC; Christian Vernam, SUNY Alfred; Hannah Ward, St. John Fisher College; Brittany Zeager, St. John Fisher College

State of the Association address (Kerrie Cooper)

Legislative Activity - Kerrie told us that there has been a lot since our last meeting in November. We have seen the Perkins loan program extended by two years after it had been terminated by Congress in late summer thanks to NASFAA advocacy. The Exec Council met with members of the State Legislature to discuss the impact of Prior Prior Year (PPY) on the FAFSA and what it means for TAP. We are the only state in the union which has state aid bound by legislative statute to the most recently completed tax year. In order to change it to reflect PPY as FAFSA will now be, it requires legislative action. In the meetings they had with legislators, most did not know about this. As a result, just about all of them have promised to introduce legislation soon to address this problem. Two of the legislators they met with were Glick and Lavelle. Glick has said she is drafting legislation at this time.

Exec Council is budget planning for 1617. The 1415 audit has been completed so the taxes will be completed on time.

They are watching the Pennsylvania state association to see what results they get from their study of institutional membership and will see how this can be used to help our state organization.

Volunteerism - They are encouraging volunteerism and are happy that 7 of the 8 members on Exec Council are new volunteers.

EASFAA and NASFAA – They will be celebrating their 50th anniversaries this year. Please consider attending their annual conferences. EASFAA conference will be in Atlantic City from May 22nd to May 25th. This will be a nice tune-up for the gambling folk who also plan to attend our NYSFAAA conference in Turning Stone in October. The NASFAA conference will be in Washington DC from July 10th to the 13th. This is a great city to visit and a chance to visit do-nothing Congress-people so as to twist their ears and arms to get them to expand financial aid programs.

Statewide Training (Jim Briggs: The Tax Detective)
Highlights:

- Taxable scholarships are considered earned income.
- Net earnings from self-employment that exceed $400 require a tax return to be done. This is catching a lot of students who are issued 1099s by entities such as construction companies and country clubs who are avoiding having to pay FICA and benefits by treating them as contract workers. Therefore they are considered self-employed so they need to account for their expenses and do a schedule C.
- Lot of discussion about undocumented aliens and when they need to file a tax return (refer to publication 519). Jim Briggs told us the IRS does not share data they collect from aliens requesting an ITIN for tax return purposes. Therefore they can be assured they are not going to be reported to Department of Homeland Security or other federal agencies. Since aliens requesting ITIN do not have SSNs, they cannot do IRS DRT but they can request transcript.
- Only 0.08% of people are audited so no one should be concerned that doing the IRS DRT will increase their chance of being audited.
- We should wait until June 15th before relying on IRS Statement of Non-Tax Filer.
- Since IRS DRT and requesting transcripts require the EXACT street address to be used, be aware that if a person is using an address that doesn’t match the US postal service’s address associated with that residence, the IRS will likely not recognize it and will not proceed with the IRS DRT or the release of transcript. Direct your students to go to www.USPS.com and enter their address to see what USPS lists for them and then use that to request the tax data.

Request for Assistance - Jim Briggs is asking for assistance to help a colleague who is working on the tax return transcript conversion key to assist financial aid folks with using the transcripts to find the data they need for verification. These used to be the USA Funds templates that helped connect the FAFSA data elements with the corresponding line items on the tax return transcript. They are looking for copies of 2015 tax returns and transcripts with the personal info redacted. Please contact him if you can assist with this worthy endeavor.

Business meeting (followed our “working” lunch)

Secretary Report – no secretary here due to family sick

Treasury Report – our Region has a balance of $2247.61 which includes a revenue sharing check of $650 received in January

Membership Report – we now have 116 paid members which is an increase since our last meeting. There are 1259 in NYSFAAA currently which is comparable to last year. We are working on outreach to grow our membership as we are down compared to historical averages. We have 15 affiliate members.

Vendor Update – Only SallieMae has something to report and it’s a doozy. They are putting out a private parent loan in mid-April. It will be for both undergrad and grad. They will send updates and notify us of a webinar about it.

Exec Council Report – February meeting in Albany. Goal for membership is 1325. Jan told us our budget goal is $84000 (currently it is $77000). NYSFAAA conference in 2017 will be downstate in Tarrytown.
After Exec Council went to the state legislators to advocate for PPY update to TAP processing, Kerrie received an email the following day from the Higher Ed Committee chair to make her aware that they are working on this so progress is being made.

**NYSFAAAA conference 2016 Update**

**Speakers** - We have locked in our speakers for the most part.

- Dr. Guadalupe Quintinella who is an Associate Professor at the University of Houston and who presented to NYSFAAA back in the late 1990s before will be coming. She tells her story of her struggle with learning English and then goes on to college. She owes her success to a financial aid advisor who didn’t give up on her.
- The keynote speaker for our luncheon will be Pam Sherman who is a writer for the Democrat & Chronicle who has a weekly Saturday column titled “Urban Outlaw”. She encourages engagement and getting excited about leadership regardless of your level in the organization.

**Facilities** – The biggest complaint we had about our conference the last time it was hosted at Turning Stone was the overwhelming smoke from the casino which could knock out a horse. This should be better this time as smoking has been restricted at the casino. They also have added more nightlife options with “Exit 33” which has multiple bars in one location. There is also the possibility of a mall opening at the casino. A question was asked about who to direct **AV requests** – those should go to the Program Committee, not Facilities.

**Program** – We are working with our affiliates to support the theme “All in for Student Success”

**Graduate/Professional Symposium** – BJ Revill is working on getting this together. Adrienne King will be leading this. It will be 8am to 12pm on Tuesday, the first day of the conference.

**Photographer** – After there were efforts to meet the request for pictures at this past year’s conference, we are asking for a Region II member, spouse of a member, or a student to volunteer to be our **photographer**. We would prefer to get someone from within our region before going outside since we are the hosts for this conference. Contact BJ if you know of someone.

**Other Regional Business**

**Next Meetings** - We have our next meeting on 3/11 scheduled to be at RIT. Ramon Rodriguez will be our guest speaker presenting the Alpha Effect for Financial Aid Administrators. In April, we are scheduled to be in Alfred on the 22nd.

**Joint meeting proposal with Region I** – We are hoping to have this in May but Region I is hoping for April. Likely to have this at GCC. **BJ is looking for ideas for a topic or speaker**. One proposal is to set up a Webinar with HESC to discuss TAP and state scholarships. Another proposal is to discuss PPY and how the other region is handling it. We could possibly to both. Any other ideas are welcomed, please let BJ know.
Novice Training (Jan Scheutzow) – This will be at St. Mary’s College in Newburgh from Sunday 6/5 to Thursday 6/9. Registration starts at 10am Sunday and training starts at noon. Cost is $625 which includes membership dues, lodging, meals, and training. It’s a great deal! If flying in on Saturday helps someone to obtain better flight pricing, they will be able to be housed at no extra cost.