



**NYSFAAA**

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

**2012-2013 Annual Report**



*New York State Financial Aid  
Administrators Association*

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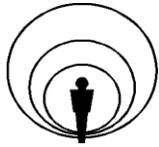
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*New York State Financial Aid  
Administrators Association*

## **President's Remarks**

I have worked in financial aid for so many years so the fact that time seems to fly by should be no surprise to me but when I realize that I am already at the midpoint of my tenure as NYSFAAA President, I am amazed. It has been a whirlwind this past year in the financial aid profession with the many new regulatory requirements, resource challenges, workload issues, etc., but you all are more than aware of this. At the same time, it has also been a most challenging and I feel, successful year for NYSFAAA. Much has been accomplished due to the efforts of our Executive Council, our statewide committees and the membership in general. We have an amazing organization, the largest and most active in the nation. We are often used as a benchmark by other states and even regional associations. It is remarkable that a group of volunteers are able to do so much and offer so many services in New York State to our students and other interested parties. As I look through this annual report, it is remarkable to note all the different activities and undertakings that have been accomplished this last year. My remarks can in no way cover all the myriad achievements that have taken place. I encourage you to review the various reports contained in this document as they do detail our outstanding work.

First, I would like to acknowledge the efforts of our NYSFAAA Officers. They have effectively managed and guided the association and its many committees over this past year despite my constant emails, telephone calls and frequent meetings or retreats. They have been a great team that has worked so well together in both planning and executing the past year's activities so I do want to acknowledge them:

Janice Scheutzow, First Vice President – Nazareth College  
Jane Gilliland, Second Vice President – Alfred State  
Kathleen Flaherty, Secretary – SUNY Oswego  
Patricia Johnson, Treasurer – Syracuse University

I also wanted to acknowledge Dan Tramuta and Steve Dwire as Past President and Past Treasurer for their continued support and advice over the past year.

Working with them have been the other members of our Executive Council, our regional chairpersons:

Michelle Rizzo – Region 1  
Lisa Papke – Region 2  
Dawn Langdon – Region 3  
Kristina Delbridge – Region 4  
Dan Robinson – Region 5  
Lou Palefsky – Region 6  
Gene Rogers – Region 7  
Shalena Duprey – Region 8  
Lisa Simpson – HESC liaison

I have been exposed to and worked with many such councils over my career in financial aid but I have never seen an Executive Council that has worked together better than this one. This is not to say that there has not been differing opinions and active debate but I appreciate their dedication and collegiality in conducting their administrative duties, serving as liaisons to the NYSFAAA regions and planning and guiding the Association through innovative and exciting ventures in our profession. Finally, I must also give an official recognition to our committee chairs and members where so much of what we do is accomplished.

As I said in my address at the last conference, there were some broad areas that I wanted to concentrate on while serving as your President. They were Communication, Advocacy, Mentoring and Planning or CAMP. I am so pleased that we have made some significant progress and major accomplishments in each of these areas over the past year.

### **Communication**

Under Past President Dan Tramuta and his administration, there was a massive reorganization and improvements made to our Association's website which resulted in a much more appealing and user friendly product which provides timely and useful information to our membership.

As part of this process, the NYSFAAA blog, *Empire Chat*, was implemented providing a platform for disseminating, debating and commenting on those issues facing or impacting our financial aid profession. As of October 1, our blog has had over 18,000 hits mostly from our members but it has also been accessed from Sweden, China, France and 46 other foreign countries searching for information on our association. The latest most common searches the day I checked was of course, our NYSFAAA Conference and Cohort Default Rates. The blog does reflect the pulse of our Association. Postings have been made on subjects ranging from our training and webinars, conference reactions and comments, notes from Council meetings and reactions to proposed legislation.

I think it is a great and useful tool but it is also being underutilized. Only a small portion of our membership has subscribed to or are posting topics or comments on the blog. I encourage you all to subscribe to the *Empire Chat* at our website and get in on the conversations.

Based on the work of our Technology, Innovation and Communications Committee or TIC Committee, NYSFAAA nominated our redesigned website and blog for a NASFAA Gold Star Award. I would place the quality and usefulness of this valuable tool above any other state association's I have seen. In fact, EASFAA has been monitoring our development and modeling much of their new site based on what we have done. Again, acknowledgement needs to be given to the entire TICC, Howard Leslie and Gina Soliz who were heavily involved.

Another great advancement in our communication efforts has been the creation of our new affiliate membership. Presented at our last annual conference and subsequently approved by an overwhelming majority, this new non-dues paying, non-voting membership was made available to those individuals whose duties are indirectly related to the financial aid profession in order to directly serve a student clientele. This category includes school counselors or other such persons that do not qualify for any other NYSFAAA membership classifications.

It was felt that by inviting this group into our association, allowing them to attend our meetings and training as well as obtaining their input and expertise, it would enhance our communication and networking capabilities, increasing our effectiveness and outreach to all New York State students.

## **Advocacy**

This is an area where we have been quite active. I have been trying to blog some of the different activities we have been involved in as they occur. Our strategies this year related to advocacy have included to:

- Provide input to the regulatory and other processes wherever and whenever we can
- Reach out to our area legislative representatives and educate them and explain the needs of our students
- Respond to NPRMS and other proposed regulations or requirements and offer our extensive expertise
- Visit our legislators and invite them into our meetings

Our NYSFAAA Government Relations Committee has been very busy. Monthly conference calls have been held between myself and the chairs of the federal and state sub-committees.

There is now a real need to get the regions more actively involved in the process. We have asked to have a representative from each region for each sub-committee and have government relations become a regular agenda topic at each regional meeting. We need to actively gather input from our members, develop position papers, provide data and input to lawmakers and regulators and discuss and debate the various aspects of financial aid administration.

## **State Relations**

You have previously received a copy of the TAP Reform White Paper from Sue Mead, our state relations chair, and it is posted on our website in the resource section. It has also been sent to the state senate and assembly's higher education committees. I believe it is an excellent piece that was drawn up by the prior state relations committee. Committee members then included Sue Mead, Bill Cavin, Mike Williams, Dan Sistarenik and Shirley Clark. We must now take it on to the next step and enlist the help of the regions in contacting legislators. Our primary proposals include:

- The need for transparency and equity in reducing the multiple TAP schedules and different standards.
- The use of the federal AGI in place of the NYS net taxable income which would simplify the application, create a standard needs analysis and eliminate administrative burden, including the Income Verification Process.
- Adapting the federal standards and definitions of an independent student including the use of professional judgment where applicable.

To this end, Sue Mead has been meeting with a number of other organizations and agencies that are also advocating TAP reform including the State Education Interagency Task Force, the New York State TAP Coalition and the New York Public Interest Research Group (NYPIRG).

This is an area that I would really like to concentrate on this next year. Sue Mead and I are working on a unified campaign with other organizations to promote change in this area. It will require a concerted push from all of our regions and members to make this happen. More information on this drive will be coming to you shortly.

## **Federal Relations**

Co-chairs Maria DeInnocentiis and John View have also been hard at work. A briefing paper was drafted and approved by the Executive Council. Its basic tenants include topics such as:

- Preserving and protecting funding for the campus based programs.
- Proposed changes to the needs analysis system, including the particular use of prior, prior year data.
- Promoting financial literacy
- More effective student consumer information disclosures and regulatory relief.

As we proceed to the Reauthorization of the Higher Education Act, the work of this committee and the entire membership will be crucial in providing input and feedback to that process.

## **Mentoring**

This is an area where NYSFAAA has always excelled, particularly in the training of our novices over the years. I have had the pleasure of working with our neophytes for the past few years. This is yet another activity where NYSFAAA serves as a national model of excellence. Thank you once again to the Lisa's (Simpson and Papke) and all of our trainers for the excellent work with our new financial aid professionals.

We now need to get our new members involved with committees and projects at both the state and regional levels. They need to be able to attend area meetings and events. One of the things I charged all our committee chairs with is enlisting our newer members to serve on committees and also as co-chairs-in-training. We encourage your cooperation in making this happen.

I also feel that our organization does an excellent job in mentoring through training. I believe that here again we lead the other state associations, be it via our excellent training opportunities provided by our Professional Development Committee co-chaired by Kristina Delbridge and Howard Leslie, to our regional meetings where we help train not only each other but our support staffs and high school counselors. I do not know of any other state or even regional association that can offer the varied and in depth opportunities that NYSFAAA provides. A personal thank you to all those involved for your contributions in this area.

Another significant accomplishment in the mentoring area has been the re-initiation of the NYSFAAA Intermediate Workshop. This is a crucial activity in helping to prepare the next generation of senior leaders and directors for our profession. A task force under 2<sup>nd</sup> Vice President Jane Gilliland met to investigate and implement this much needed event which will concentrate on office management and higher level functions such as budgeting, personnel management and completing the FISAP and other required reporting. This event is scheduled to take place this November.

Under the umbrella of mentoring, I would also include all of our outreach activities. Once again, with the co-sponsorship of HESC, we have held a series of High School Counselor Workshops across the state that were widely attended and well received. Our multiple College Goal New York events were attended by hundreds of students of which 84% were in the low income range that we were targeting. One hundred percent of those attending were able to submit or at least save their FAFSA online. Please review the Outreach Committee's report in detail for more information on this project which has now become a national model. Chairs Rachel Barker, LaSonya Griggs, and Gene Rogers with project leader Wayne Howard are to be congratulated.

## **Planning (Organization)**

Much of the efforts of myself, the other officer's and the Executive Council this year have been spent in planning and administrative activities. Again, I think one of the most significant changes has been the creation of the new affiliate membership category.

I sent an email to the High School Counselors of New York as soon as our website and materials were revised to accommodate them. I was actually at an EASFAA Executive Council at the time it occurred. EASFAA was quite interested in this and asked what the response had been. I queried our database not knowing what I would find as it had been less than 24 hours since the notice went out. Just in that time, we picked up 79 new associate members. I was surprised and the EASFAA Executive Council was impressed. NYSFAAA now has over 200 affiliate members. The next step is to reach out to those persons and invite them to our meetings and events. Again, Councilpersons have been charged with this task.

Our strategic plan has also undergone an extensive review and rewrite. A task force chaired by Anne Barton, was charged with converting it from a five year into a three year plan to more accurately reflect our volatile and ever changing profession. Bearing in mind that NYSFAAA is a volunteer organization, we also needed to base the reporting requirements accordingly. We must now begin to use this document as a blueprint and assessment tool for our association and its activities. All Executive Council and Committee Chairs should review it in light of their responsibilities and use it as a guide. The Governance Committee under President Elect, Kerrie Cooper, will be utilizing it as an assessment guide throughout the next year.

We have reviewed all the committees and contacted current chairs or enlisted new chairs where necessary. The 2013-14 committee organizational chart will soon be posted on the website. I encourage you to view the chart under *History/Governing Documents* and contact the chair of any committee you might be interested in working with.

A new operational calendar has also been developed based on a review of our Constitution and By Laws, policies and procedures and practices. A list of tasks, projects, deadlines, etc., by month has been compiled to help guide the Executive Committee and our standing committees and members to ensure that our business is done in a timely fashion. This too has now been posted to our NYSFAAA website under *History/Governing Documents*.

We have doubled the number of Executive Council meetings to better accomplish the association's business and to enable us to respond to time sensitive matters. In order to minimize the burden on Executive Council members and the budget, these meetings are held electronically using our GoToMeeting software between our regularly scheduled in person meetings.

Another significant reinitiation this past year has been the revitalization of the Development Committee under the leadership of Theresa Chaastain. The committee will be assisting the various standing committees and the Executive Council to secure funding and resources for desired projects and events through fund raising, grant proposals and other means. Please reach out to her to volunteer for this committee as she convenes this group or with your specific funding needs.

In regards to the future, I am so pleased that we were able to again have a full ballot for our NYSFAAA elections. I wish to acknowledge and thank everyone that ran for NYSFAAA President Elect and Treasurer Elect as well as for regional councilpersons. I am so pleased to officially announce that Kerrie Cooper is our new President Elect and that Kerry Lubold is Treasurer Elect. I have known and worked with them both for many years. They have already been hard at work attending our officers' retreat, working with the Executive Council, and learning their new duties.

They will both be great assets to our organization. I am also pleased with our regional elections that took place this last year. Councilpersons for the 2013-15 term have been elected:

Sean Hudson – Region 1  
Melissa Casselman – Region 2  
Darrin Rooker – Region 3  
Kristina Delbridge – Region 4  
Roberta Daskin – Region 5  
Lucy Villaquerin – Region 6  
Eugene Rogers – Region 7  
Todd Moravec – Region 8

By now, they have attended their first Executive Council meeting and I look forward to working with them as you should be too. These are your elected representatives to the Executive Council. You should use them as a conduit for the flow of information and feedback to and from the Executive Council.

Over the next year, we will need to elect our other officers for the 2014-16 term. I hope to again have a full ballot for your consideration. As always, please feel free to contact me if you have any questions regarding these positions or if you would consider running in the elections this spring.

Finally, as in any planning there must also be an evaluation or assessment of the process. This annual report provided by our officers and committee chairs, serves as an excellent review and assessment of NYSFAAA's activities and accomplishments over the past year. They are something to be proud of. I know that I am and always relate the good things that are happening in New York when I am talking to the other state association presidents or regional and national officers. I hope that it is something you are proud of too. I encourage you to become an active part of it all by being involved in a state or regional committee or activity.

As I have always said, I must also have fun in anything that I do. I have indeed had a great deal of fun CAMPing across New York State. This is not to say that there have not been issues or difficulties that we have not had to contend with but with such an engaging and cooperative group of individuals as our Executive Council and a talented and dedicated membership, nothing has been impossible or unable to be resolved or enhanced. By always keeping in mind our mission and purpose to make higher education affordable and accessible to all, we will always be successful and productive.

It has been a true honor and humbling experience to serve as our President over the past year and I look forward to the things we can do together over this next one.

Respectfully submitted,

J. Scott Atkinson  
President

## **NYSFAAA Awards Committee**

The NYSFAAA Awards Committee continues to enjoy its work. The Committee is currently in the process of collecting nominations, printing plaques and programs for the 2013 awards. Nominations have been low in number this year. We are hopeful that in the future members will take the time to nominate a deserving colleague.

This year our long-time Chair, Kathleen Flaherty, has resigned to take over the NYSFAAA Secretary position. Luckily, Kathy has been an excellent mentor and has been willing to share her comments and suggestions over this past year.

After the 2013 conference, we plan to find a volunteers to replace Robert Zasso as our Region V representative and Robyn Rhyner from Region VIII who has to step down.

Respectfully Submitted by: Troy Martin & Robert Zasso, Awards Committee Co-Chairs

Troy Martin	Co-Chair
Robert Zasso	Co-Chair
Mary Koehneke	Region I
Susan Romano	Region II
Dawn Langdon	Region III
Bryan Kelly-Austin	Region IV
Rob Zasso	Region V
Maria Deinnocentiis	Region VI
Debra Evans	Region VII
Robyn Rhyner	Region VIII

Conference 2012

**NYSFAAA 44 Final Conference Report**

**“On Track for Excellence”**

**Saratoga Hilton, Saratoga, NY**

**October 9-11, 2012**



## Co-Chair Report:

NYSFAAA Conference 2012 Co-Chairs:

Kelley Robinson, Sage Colleges

Lisa Simpson, HESC

The site for the NYSFAAA 44 conference was the Saratoga Hilton in Saratoga NY. The conference had been held there several times in the past (under several different hotel brands) and always received high ratings. The location, ease of travel from all regions of New York, and the charm of the town make for a good conference site. Although registration started off slow, we ended up with 317 participants and 24 vendors. Of the 317 participants, 188 completed the conference survey. The hotel, including accommodations, registration process, meals, and conference facilities rated very high with 86% to 96% rating the hotel from "Good" to "Excellent".

The goal of the conference was to provide strong informative sessions as well as to allow time for colleagues to network. The enthusiasm and dedication of the Region 4 Conference Committee definitely accomplished these objectives. The conference provided federal and state updates, experienced keynote-speakers who are leaders in our industry, current, in-demand training topics, and professional networking opportunities. Of the 188 conference survey respondents, 83% rated the overall conference "Very Good" to "Excellent"; 97% indicated the conference content was "Good" to "Excellent"; and 92% rated the network opportunities as "Very Good" to "Excellent".

Registration started off very slow but by the first day of the conference there were 252 Full time registrants, 7 Retirees, 24 two day registrants, 34 one day registrants, and 24 vendors. This generated an income of \$112,250.00.

Total conference expenses were \$68,483.85 and are outlined below. Conference 44 generated a profit of \$43,766.15 for NYSFAAA.

Here is a summary of the expenses for the conference:

Website Update	\$ 725.00
Best Practices winner awards	\$ 75.00
Hotel Meals and Technology	\$57,515.31
Thursday bag lunch	\$ 1,573.10
Travel for conference speakers	\$ 1,392.11
Speaker Fee- Jeff Selingo	\$ 1,500.00
Pocket Program	\$ 454.95
Name Tags	\$ 416.08
Registration Mailbox	\$ 60.00
8 Registration Refunds	\$ 2,700.00
DJ	\$ 745.00

Ghost Tours of Saratoga	\$ 400.00
Vendor Drayage and Delivery	\$ 927.00

Total Expenses: \$68,483.85

We would like to take this opportunity to thank our Conference Chairs for all their hard work in making Conference 44 a success.

The Conference Committee Chairpersons were:

Program: Beth Post-Lundquist, Skidmore College  
Anne Del Plato, Nelnet

Facilities: Andrea Wedler, Albany Law School  
Lisa Simpson, HESC  
Jim Hanley, HESC

Registration: Kristina Delbridge, SUNY Empire State College  
Michael Williams, SUNY Administration

Vendor: Laura Helmich, PNC

Publicity: Caryn Marlin, Skidmore College

Entertainment: Jean M D'Ambrosia, Sage Colleges  
Kristina Delbridge, SUNY Empire State College

**Program Report:**

NYSFAAA Conference 2012 Program Co-Chairs:  
Beth Post-Lundquist, Skidmore College  
Anne Del Plato, Nelnet Federal Loan Servicing

The goal of the 2012 Conference Program Committee was to provide a wider perspective of student aid along with sessions on developing trends and current requirements. We worked to deliver a program that would meet the needs of various sectors and levels of financial aid experience. Our keynote and general sessions provided some excellent information. Jeff Selingo from the Chronicle of Education provided a 10 year perspective of higher education and funding trends. The Presidents' Panel offered Private and Public school perspectives on access and affordability. Justin Draeger, Mark Kantrowitz and Bret Lief offered information about developing trends and the intersection of the Political and Higher Education Funding worlds.

The program committee was comprised of experienced aid officers from a variety of sectors and backgrounds, many of whom had served in leadership positions in the state, regional and national associations. The involvement, professional connections, and energy of committee members was a key component of this committee's success. School members came from private, public, two-year, four-year, and graduate schools. They were from various sized institutions as well. Since we had no proprietary member, we assigned a committee member to reach out to that sector to gain session recommendations. To that end, we interviewed four schools in NY's proprietary sector who serve on the Association of Proprietary Colleges (APC's) advisory council. The non-school members of the committee represented HESC and a federal loan servicer. Our "unofficial" member, a Vice President of Admission and Financial Aid at The Sage Colleges, offered connections to and contacts for Jeff Selingo Senior Editor of the Chronicle of Higher Education, Catharine Hill, President of Vassar and Drew Matonak, President of Hudson Valley Community College.

The committee decided early in the process that school presenters would be given top priority in delivering sessions. This was accomplished, and we were able to tap into the expertise that partners bring to our profession when the topic warranted. Examples of the latter include TAP sessions from SED, OSC and HESC, Veteran's sessions from the U.S. Office of Veteran's Affairs, Loan Repayment sessions from Federal Loan Servicers, etc. We were pleased to offer a range of topics offered by our financial aid colleagues as well. In addition to technical financial aid subjects, they provided information on financial literacy, social media, customer service structures, and so much more. A thumbnail of our session offerings is attached.

We posted a request for session proposals to the NYSFAAA List Serve in May 2012, and also invited members to submit topic ideas that would be helpful to them in their day-to-day work. The response was excellent. In total, we received over 50 responses. The committee reviewed every one very closely and included most. We responded to each, thanking them for their submissions and letting them know of the committee's decisions.

Program evaluations were outstanding, both overall and for individual sessions. The committee must acknowledge the outstanding contributions of Lisa Simpson of HESC, who served as Conference Chair and did so much for our committee as well. Lisa worked on coordinating sessions, she took responsibility for the pocket program and the long version program, and stepped in any way needed.

NYSFAAA Conference 2012 Program Committee members:

Lisa Simpson, HESC

John Austin, HESC

Larry Chambers, Rensselaer Polytechnic Institute

Becky Cozzocrea, Fulton Montgomery Community College

Jim Vallee, Retired

Andrea Wedler, Albany Law School

Diane Corbett, University at Albany (SUNY)

Tom Dalton, Excelsior College

Bill Cavin, SICAS Center

## **Challenges:**

The largest challenge of the Program was securing Jeff Baker for the Federal Update. A committee member started reaching out to him in March 2012, a full 8 months prior to the conference. We received no response, even after the Program Chairs and the federal trainer assisted. We then reached out to Kathleen Smith, who said she would try to join us, but was unable to as we got closer to the conference. Our regional trainers for FSA could not travel to join us either. Jeff finally confirmed, but it was for a remote, speakerphone-delivered session and his confirmation was just a week before the conference. Since he couldn't fit into the timeframe, we were forced to move our agenda around, thanks to some very accommodating general session presenters. Even though his presentation was via speakerphone, it was highly rated in the program evaluations.

## **Key Recommendations:**

Continue to reach out to membership for session proposals and ideas. The May timeframe worked well. Last year's committee requested sessions in April and did not have as strong a response.

Consider technical media options for Federal Update and other FSA sessions. Since travel restrictions have affected ED presentations for two years now, we recommend incorporating that in early planning efforts by investigating options that would allow FSA to present using video as well as audio options. Please note: We learned that skype and FaceTime- two popular technologies for presentations- are not options for the ED.

Bring expense forms to share with presenters at the conference to expedite the reimbursement process.

Actively reach out to newer members of the profession to serve on the committee as mentees. This is an excellent way to invest in the future of NYSFAAA and to encourage new leaders to emerge.

## **Facilities Report:**

NYSFAAA Conference 2012 Program Co-Chairs:

Andrea Wedler, Albany Law School

Lisa Simpson, HESC

Jim Hanley, HESC

As co-chairs of the facilities committee, we made approximately four trips to the hotel to negotiate and settle details. We met with them to discuss a possible discount in room pricing, to ask for free parking for attendees (which we did get), to review room scheduling, find the best places for the vendor area, check in, poster contest display and committee fair. On our first visit in the late winter, we received a copy of the menus, but didn't actually select the food items until late summer on our final visit.

When it was time for the final food counts, we adjusted down from the total conference count for the breaks and meals as we know that some folks will not attend all food events and will choose to eat on their own (particularly for the receptions). Even for the plated dinner that required attendees to choose a dinner selection, we had approximately 60 people who chose a meal and didn't attend the dinner. We chose to have the breaks in the vendor area as we felt it would help create more traffic for the vendors.

We decided on the last day of the conference that many people would be more interested in getting on the road to travel home and that a snack/goody bag would make a nice giveaway. We explored some inexpensive options for lunch bags and had the NYSFAAA logo printed on them.

We bought water bottles, granola bars, candy, pretzels, etc. from BJ's and spent the Monday prior to the conference filling them up at the hotel. Then, as folks were exiting the hotel, we handed them out and collected the name badge holders to be re-used for next year.

For the facilities and technology requirements it is important to take a pro-active approach. Require that all presenters advise of their equipment needs well in advance giving the committee time to procure as much of the equipment as possible from local colleges to reduce hotel AV charges. Also, have presenters send their powerpoint/pdf shows in advance to assure compatibility with the borrowed equipment.

We met with the hotel staff to verify that the needed outlets, wi-fi connections, etc. were available in each breakout session room. Make sure the hotel provides a cart for the laptop/projector and a screen set-up in the rooms. This is more cost effective as you do not need to rent the equipment. Consult with the hotel to see if they have equipment on hand if needed. In most cases audio should not be necessary in smaller breakout rooms.

Before each session, have the technology committee staff bring up the PPT/PDF show in all breakout rooms and discretely "check" on the rooms throughout the session. Secure the equipment after the last session each day. Also, secure the rooms when there is no session. For general sessions/banquet, I suggest that the hotel provide the technology/equipment and set up.

#### **Registration Report:**

NYSFAAA Conference 2012 Registration Co-Chairs:

Kristina Delbridge, Empire State College

Michael Williams, SUNY Administration

**TOTALS:** A total of 317 people registered for the conference. We had 252 full time registrations, 34 one-day registrations, 24 two-day registrations and 7 retirees.

**EXPENSES:** \$60.00 mailbox rental and \$416.08 for name tags= \$476.08 total expenses.

**SCHOLARSHIP WINNERS:** The Scholarship and Mentoring Committee granted three free registrations from the novice training participants.

Overall, registration went quite well. We were adequately staffed. We had a few last minute registrants who needed name badges and a few people who had trouble registering so we walked them through the process.

The Registration Committee was responsible for the following tasks:

- Set up online registration with ATAC
- Record payments for conference and membership fees
- Order name badge holders and lanyards
- Print name badges
- Check in all registrants
- Service the Registration Desk at the conference
- Hand out name tags, discount information and maps
- Direct members to meeting rooms
- Follow-up with non-paid registrations
- Send out the survey to attendees and access the results through Survey Monkey.
- Request that pocket programs be sent early so they can be ready for early registration.
-

- Make sure to post registration instructions for those groups that are not in the mainstream. (conference fee waivers, lifetime members) as it gets confusing for those that fall out of the norm.

We would like to thank the following people for assisting at the registration table during this year's conference:

SUNY Empire College Staff: Donna Gallagher, Devan Wood, Michelle Fountaine, Geri Winney, Nicole Hoyt, Adrienne Miller and Michal LaBrecque;

Union College- Meredith Tower,

Bryant and Stratton- Lorraine Dragon

Linda Bridgewater

Suggestions for future conferences:

- Decide prior to go-live date for registration if you are going to offer a special reduced rate for retirees and incorporate into the online registration form.
- It worked well to have the Vendor registration/issues handled separately.
- Make sure that it is clearly stated that membership is required to attend the conference and that if the member has not renewed their current membership; they will need to do so prior to registering for the conference.
- Make sure that it clearly states the membership fee is separate from the conference registration fee.
- Prior to the conference, checks should be sent to the Registration Chair and not to the NYSFAAA Treasurer. Registration Chair posts the payments, and makes copies of checks. Send checks, a copy of those checks and the detail of posted payments report to the NYSFAAA Treasurer. Registration Chair should keep a copy of all checks and the reports.
- List cancellation policy on the registration form and request that it be added to the receipt.
- Make sure you have an Internet connection at the hotel for the registration desk to handle issues as they arise, record payments and late registrations.
- We opened registration on Monday which was helpful- it was mainly vendors but allowed people coming in from out of town to register and prevented a huge rush on Tuesday morning. We staffed the tables Monday 3-6. Tuesday 8-5 and Wednesday 8-4. This time seemed to be fine.
- Think BIG! Order/plan for extra.
- This year, the Registration Committee did not sell raffle tickets at the table. (Scholarship baskets were located beside the registration table with Scholarship Committee staffing.)

Thank you again, Leigh Bovee and Great Lakes for printing the pocket program at a minimal cost to the conference.

### **Vendor Registration Report:**

2012 NYSFAAA Conference Vendor Final Report

Laura Helmich, Vendor Chair, PNC Bank

We had 24 vendors attend with all vendors paid in full at time of the conference. This year the vendor fees increased to \$400.00. For the \$400.00 fee the vendors were provided: 1 draped table, 2 chairs and waste basket and listing of conference attendees 2 weeks prior to the conference.

The exhibitor page and exhibitor registration was on-line and vendors are able to pay their fees with a credit card. For vendors who paid with a check, they were sent to the Registration Chair to make it easier for the accounting with the Treasurer.

## Onsite Overview with Saratoga Hilton

- Reviewed vendor space for conference and determined table set up would accommodate up to 28 vendors.
- Priced out rental of table with skirting, and chairs for the vendor area with both the hotel and 2 rental companies. Selected rental company- Clifton Park Rentals. The cost of booth space for vendors is paid by NYSFAAA.
- Reviewed with hotel shipping instructions for vendors with the hotel. It was determined hotel did not have to space to hold all vendors shipments. Also, used drayage service with the rental company Clifton Park Rentals. Provided vendors with drayage information and vendors were responsible for paying their own drayage fees.
- The area for the vendors was in a hallway in the Hilton, and was able to handle traffic. We created 2 signs to recognize the lenders and we also had the breaks in the vendor area to ensure traffic.

I would recommend continuing to have breaks in the vendor area to provide traffic into the area.

## Survey Results:

After the conference I conducted a Survey for vendors 18 out of 24 vendors responded to the survey that is attached. Most vendors express they will vend for our 2013 conference.

## Publicity Report:

NYSFAAA 44 Publicity Report

Caryn Marlin

Theme: “On Track for Excellence” was the chosen theme. With the conference being located in Saratoga Springs, the “track” theme was appropriate. The conference’s home page on the website included a hand sketched picture of a horse with a diploma on its head, a winning wreath and the number 4 as its chosen racing number as in the 44th conference and region 4 as the conference hosts. An emphasis was placed on providing a variety of sessions to cater to a variety of aid administrators to stay “on track for excellence”.

Publicity Blasts: Email blasts were sent to the NYSFAAA statewide list serve as well as to each regional list serve. The first blast (March) was handled by conference chair. Once the conference mini-site was set-up on NYSFAAA’s website, a monthly email blast was sent in June and July. Three were sent in August. Weekly emails were sent in September. Then for the last couple of weeks before the conference, email blasts were sent twice a week.

The blasts centered on a “hot” topic. For instance, once the mini-site became available, once hotel registration became available, once a “known” speaker was scheduled, email blasts centered on the topic. See the attached Publicity Timeline for details on content.

Whenever email blasts were sent, Twitter and Facebook were updated by a NYSFAAA member.

Budget: \$0

Comments: Although the committee was to be co-chaired by two people, it became a committee of one which in retrospect worked fine. Using the prior year’s outline for email blasts was a good guide. Before sending your first blast, it would be helpful to have someone review how an email is sent to the members.

Members can tire of the same old email blasts. Try to bring levity to the later ones.

Use the resources of the membership to gain publicity. Can a colleague contact the local paper to put in a word about our conference?

For NYSFAAA 44, the contacts were:

Email blasts to NYSFA-L listserv – all members can do this

Email blasts to NYSFAAA regional listservs – publicity chair will need to be granted access

Facebook/Twitter Page Administrator: Sarah Macri, NYSFAAA Technology and Innovation Committee (scm@berkeleycollege.edu)

#### NYSFAAA 44 Publicity Timeline

DATE	Publicity
March	"Please Join Us" Conference announcement placed on NYSFAAA website (chair handled?)
03/20/2012	"Please Join Us" Conference announcement placed on Facebook
03/20/2012	"Please Join Us" Conference announcement placed on Twitter
06/06/2012	Email blast with "Save the Date" flyer attached - NYSFAAA Listserv
06/06/2012	Email blast with "Save the Date" flyer attached - Regions 1 thru 8
06/06/2012	Twitter and Facebook updated with "Save the Date"
07/30/2012	Email blast - check newly launched NYSFAAA website, reg at hotel by 9/5 for a free room - NYSFAAA Listserv
07/30/2012	Email blast - check newly launched NYSFAAA website, reg at hotel by 9/5 for a free room - Regions 1 thru 8
07/30/2012	Twitter and Facebook updated with email blast
08/16/2012	Email blast - see conference website for details, reg by 9/5 for free room - NYSFAAA Listserv
08/16/2012	Email blast - see conference website for details, reg by 9/5 for free room - Regions 1 thru 8
08/16/2012	Twitter and Facebook updated with email blast
08/24/2012	Email blast - highlight Jeff Selingo, keynote speaker, reg reminder by 9/5 - NYSFAAA Listserv
08/24/2012	Email blast - highlight Jeff Selingo, keynote speaker, reg reminder by 9/5 - Regions 1 thru 8
08/24/2012	Twitter and Facebook updated with email blast

08/29/2012 Email blast - highlight sessions, reg by 9/5 - NYSFAAA Listserv

08/29/2012 Email blast - highlight sessions, reg by 9/5 - Regions 1 - 8

08/29/2012 Twitter and Facebook updated with email blast

Request to send 2 email blasts per week

09/04/2012 Email blast - TAP - NYSFAAA Listserv

09/04/2012 Email blast - TAP - Regions 1 - 8

09/04/2012 Twitter and Facebook updated with email blast

09/07/2012 Email blast - highlight Shopping Sheet/Award Letter session - NYSFAAA Listserv

09/07/2012 Email blast - highlight Shopping Sheet/Award Letter session - Regions 1 - 8

09/07/2012 Twitter and Facebook updated

Email blast - room block expires 9/15, REGISTER (followed NYSFAAA president em blast) - NYSFAAA Listserv

09/12/2012

Email blast - room block expires 9/15, REGISTER (followed NYSFAAA president em blast) - Regions 1 - 8

09/12/2012

Twitter and Facebook updated

09/14/2012 Email blast - Chat with Colleagues - Sector Forums - NYSFAAA Listserv

09/14/2012 Email blast - Chat with Colleagues - Sector Forums - Regions 1 - 8

09/14/2012 Twitter and Facebook updated

09/18/2012 Email blast - Highlight Access/Affordability/Trends/Enr Mgmt - NYSFAAA Listserv

09/18/2012 Email blast - Highlight Access/Affordability/Trends/Enr Mgmt - Regions 1 -8

09/18/2012 Twitter and Facebook updated

09/21/2012 Email blast - Highlight Social Media Session - NYSFAAA Listserv

09/21/2012 Email blast - Highlight Social Media Session - Regions 1 - 8

09/21/2012 Twitter and Facebook updated

09/27/2012 Email blast - rescheduled Fed'I Update/New closing session - NYSFAAA Listserv

09/27/2012 Email blast - rescheduled Fed'I Update/New closing session - Regions 1 - 8

09/27/2012 Twitter and Facebook Updated

09/30/2012 Email to First Time Attendees - general info

10/02/2012 Email blast - That's ENTERTAINMENT - NYSFAAA Listserv

10/02/2012 Email blast - That's ENTERTAINMENT - Regions 1 - 8

10/02/2012 Twitter and Facebook updated

10/04/2012 Email blast - check list on what to bring to - NYSFAAA Listserv

10/04/2012 Email blast - check list on what to bring to - Regions 1 - 8

10/04/2012 Twitter and Facebook updated

### **Transportation Report:**

No committee needed.

### **Entertainment Report:**

2012 NYSFAAA Conference Entertainment Report

Jean M D'Ambrosia, Sage Colleges

Kristina Delbridge, SUNY Empire State College

The co-chairs were responsible for:

- Coordinating Tuesday Night Dinner on your own Discounts with local restaurants.
- Coordinated a Ghost Walk Tour with the Saratoga Arts Council. 40 participants. The cost for this, for 40 attendees was \$400.
- Coordinated Morning Walks for Wednesday and Thursday morning. (note that only 3 conference attendees walked, other than the guide, on Wednesday and none showed for Thursday). Suggestion next year that sign up be required.
- Coordinated a get-together at the Parting Glass on Wednesday Evening starting at 9pm. The Parting Glass provided space for free, the conference provided a DJ at the cost of \$695 for the evening (plus a \$50 tip). The DJ Company we used was Conway Entertainment based in Latham, NY. We also provided food from the Parting Glass, which cost \$605 and was provided by Region 4. The Parting Glass offered our attendees specials, with a cash bar. There was a good turnout but we had an unforeseen power outage in Saratoga late that evening. The Entertainment Committee spent a total of \$1145.00 and Region 4 contributed \$605.

Future enhancements:

A quartet for the President's reception would have been nice.

We did a lot of pricing for Tuesday night options (bowling, other hay rides, the winery), the Ghost Tour was the most reasonable.

## Development Committee

June 10, 2013

Provided by: Theresa Chastain

Committee Members:

Theresa Chastain, American Student Assistance

Ryan Williams, DFA Syracuse University

B.J. Revill, DFA University of Rochester School of Medicine and Dentistry

Laura Hemlich, PNC Bank

Activity to date:

We've had (3) Conference Calls as a team to discuss approach, review research findings and start to create Formal Proposal for Executive Council. We've begun researching Grants/Funding Options and discussing alternate funding ideas. Requested Regional Activity from across the state to compile a comprehensive list of what we are doing statewide.

Discussed responding to May 5, 2013 College Access Grant – sub grant – declined to respond prior to establishing usage needs and administration.

Next Steps:

- Create survey to send to Regions/Statewide Committees to identify programing and funding needs. Before we submit the survey, we wanted to get Executive Council permission to:
  - Encourage Regions/Committees to think out of the box and identify *NEW* programs or initiatives to further promote NYSFAAA Mission by asking Members to indicate interest level on the following items in the survey:
    - Utilizing Multi-media to get in front students in Middle School or Earlier
    - What types of early awareness activities would you promote in your area?
    - Statewide Training is doing such a great job with training, would you like to change Regional Meeting formatting? If so, how?
    - Anything else Executive Council would like to capture?
- Seek approval to Research outside corporate funding for specific training/outreach events, to submit in Development Proposal
- Proposal due date

<u># of Regional Meetings Annually</u>	<u>Support Staff Workshop</u>	<u>Guidance Counselor Workshop</u>	<u>Early Awareness Activity</u>	<u>Other</u>
	every other Year			
	yes			
	yes			
1 - Tri-Regional (5,6,7)				

As of June 2013

## **Federal Government Relations**

John View, SUNY-ESF and Maria DeInnocentiis, Marymount Manhattan College

The primary focus of the Federal Relations Committee this past year was to develop and NYSFAAA position on certain important Federal Student Aid issues that impact us all.

This position paper was completed and recently met with NYSFAAA Executive Council approval.

The position paper is to be circulated to all NYSFAAA members with an overall goal that when we as members, communicate to our federal elected officials, that we direct them to this document so that our message is clear, concise and consistent.

The position paper can be found on the NYSFAAA website.

## Finance, Audit and Budget

### Committee:

Patricia Johnson, Treasurer

Jean Fura-D'Ambrosia, Region 4

Kerry Lubold, Chair

Perry Brown, Region 5

Amanda Lodyga, Region 1

Lucy Villaquiran, Region 6

Nora Bell, Region 2

Diane Beltrani, Region 7

Darrin Rooker, Region 3

Susan Godreau, Region 8

The Budget & Finance committee was tasked with preparing a draft 2013-2014 budget for presentation to executive council at the summer 2013 meeting. We reached out to region and statewide committee chairs to provide budget requests and prepared the draft taking those requests under advisement. After discussion and appropriate adjustments, the 2013-2014 budget was accepted by Executive Council on June 13, 2013. The budget supports the current activities of the organization, and planned initiatives for the immediate future.

Respectfully submitted:

Kerry Lubold

Finance, Audit and Budget Committee Chair

## Membership Committee

The NYSFAAA Membership Committee have only met twice during the 2012-2013 year but will meet more often in 2013-2014. Each membership representative gives reports on their perspective regions & is able to assist the Membership Chair & 1<sup>st</sup> Vice President, Adrienne King & Janice Scheutznaw with getting a pulse on the membership statewide. Affiliate Membership was introduced in 2012-2013 and we have gained 146 new Affiliate members this year. This free, non-voting membership category primarily consists of high school counselors and student accounts personnel. Adrienne was able to send out a communication regarding the difference between the Affiliate & the Active membership once renewal membership began for 2013-2014. As of June 30, 2013 the NYSFAAA total membership base was 1411, up from 1344 in 2011-12, and we recognize this growth is due to our new Affiliate Members. Our core Associate and Active membership base has actually decline by a total of 82 members in 2012-13 and the reason seems to be due to college budgetary constraints. Certain regions have even stated that several colleges/universities have less staff who have to deal with a lot more Regulatory changes. These are the reasons that people are staying in their offices and not attending meetings. The committee's challenge is figuring out how to keep the current membership engaged & recruit new members.

Future meetings will focus on raising the membership numbers from last year & updating our membership brochure.

Below is the list of the committee members:

### NYSFAAA Regional Representative

Region 1	Carrie L. Newman, <a href="mailto:cnewman123@yahoo.com">cnewman123@yahoo.com</a>
Region 2	Margaret Christian, <a href="mailto:Margaret_christian@urmc.rochester.edu">Margaret_christian@urmc.rochester.edu</a>
Region 3	Darrin Rooker, <a href="mailto:drooker@nycc.edu">drooker@nycc.edu</a>
Region 4	Linda Parker, <a href="mailto:parkerl@union.edu">parkerl@union.edu</a>
Region 5	James Filippelli, <a href="mailto:Filippelli@mville.edu">Filippelli@mville.edu</a>
Region 6	Melanie Williams-Bethea, <a href="mailto:mwilliams@tc.columbia.edu">mwilliams@tc.columbia.edu</a>
Region 7	Michelle Kaminski, <a href="mailto:MKaminski@tourolaw.edu">MKaminski@tourolaw.edu</a>
Region 8	Amanda Prescott, <a href="mailto:prescoac@potSDam.edu">prescoac@potSDam.edu</a>

## **Mentoring Committee**

The goal of the mentoring committee is to support the new people to NYSFAAA and to foster their active participation in NYSFAA activities. This was accomplished by contacting their mentees, passing along information about upcoming regional and other meetings and training opportunities available. We also had additional questions about people already in financial aid mentoring an assistant director or director. Twenty-four voluntary mentors representing each of the Regions in NYSFAAA contacted 86 mentees. Two winning mentees received a "Scholarship"-- Registration Fee Waiver and attended the NYSFAAA Annual Conference.

Jim Vallee  
Janet McGrath

October 2013

## **Nominations and Election Committee**

The NYSFAAA Elections Committee was charged with conducting elections for the position of President Elect and Treasurer Elect. The Committee was formed and solicited nominations for the positions. A full ballot with multiple candidates for each position was constructed and candidacy statements were distributed. Elections were held via electronic vote. The election results were as follows:

President Elect, Kerrie Cooper, SUNY Center

Treasurer Elect, Kerry Lubold, SUNY Plattsburgh

In addition, the regions also held elections for the 2013-15 Councilpersons. The results were as follows:

Sean Hudson, Region 1

Melissa Casselman, Region 2

Darrin Rooker, Region 3

Kristina Delbridge, Region 4

Roberta Daskin, Region 5

Lucy Villaquerin, Region 6

Eugene Rogers, Region 7

Todd Moravec, Region 8

Congratulations to all of our new Executive Council members.

### **2012-13 Elections Committee**

Scott Atkinson, President, The College at Brockport, SUNY

Lisa Treman, Region 1, Buffalo State

BJ Revill, Region 2, University of Rochester Medical Center

Annette Broski, Region 3, Mohawk Valley Community College

Kristina Delbridge, Region 4, Empire State College

Rob Zasso, Region 5, SUNY Dutchess

Vera Senese, Region 6, City University of New York

James Newell, Region 7, SUNY Downstate

Carolyn Corcoran, Region 8, SUNY Potsdam

## **Novice Training**

The 43rd Novice Training was held, for the first time, at Mercy College, Dobbs Ferry Campus from June 1st through June 7th, 2013. We welcomed 118 new NYSFAAA members this summer and Seventeen (17) staff assisted. The staff worked diligently again this year revising the *Novice Training Manual*, as there were many changes. Novice is truly a group effort and would not be what it is without each and every Novice Member. Thank you to the following staff members who contributed to these efforts and made Novice 2013 an excellent week:

### **Novice 2013 Staff**

Lisa Simpson, NYS Higher Education Services Corporation, Co-Chair

Lisa Papke, Genesee Community College, Co-Chair

Heather McDonnell, Sarah Lawrence College, Large Group Leader

Scott Atkinson, The College at Brockport, Large Group Leader

Angela Van Dekker, Fordham University

Jim Hanley, NYSHESC, Large Group Leader

Michael Williams, SUNY, Athletic Director

Dan Hunter, Director Emeritus, Buffalo State College, Small Group Leader

Curt Gaume, Canisius College, Small Group Leader

Mark Stephens, Pace University, Small Group Leader

Renee Pelletier, Stony Brook University, Small Group Leader

Adrienne King, Bank Street College, Small Group Leader

Patricia Johnson, Syracuse University, Small Group Leader

LaSonya Griggs, SUNY Upstate Medical University, Small Group Leader

Kerry Lubold, SUNY Plattsburgh, Small Group Leader

Maria DeInnocentiis, Mary Mount Manhattan College, Small Group Leader

Lucila Villaquiran, Monroe College, Small Group Leader

New this year-we had a Large Group Breakout Session that consisted of Veteran Services, Roberta Daskin, Sarah Lawrence College, Institutional Methodology, Heather McDonnell, Sarah Lawrence College and Federal Methodology, facilitated by the small group leaders.

## Participants Evaluation of Workshop

The survey was created through the use of Survey Monkey and e-mailed to all 118 attendees of the NYSFAAA Novice Training Workshop. We received 79 responses, for a return rate of 67 percent.

**Over 95% of the respondents rated the overall workshop as either very good or excellent.** Almost all respondents found it informative while benefitting from the large group/small group format and networking opportunities provided. Many Novice attendees indicating the desire for additional Veteran Services information to be included in future Novices.

The chart below represents the respondents' rating of the session as either **Very Good or Excellent**. This year we included Counseling, Civil Disobedience and added Veteran Services and Institutional Methodology.

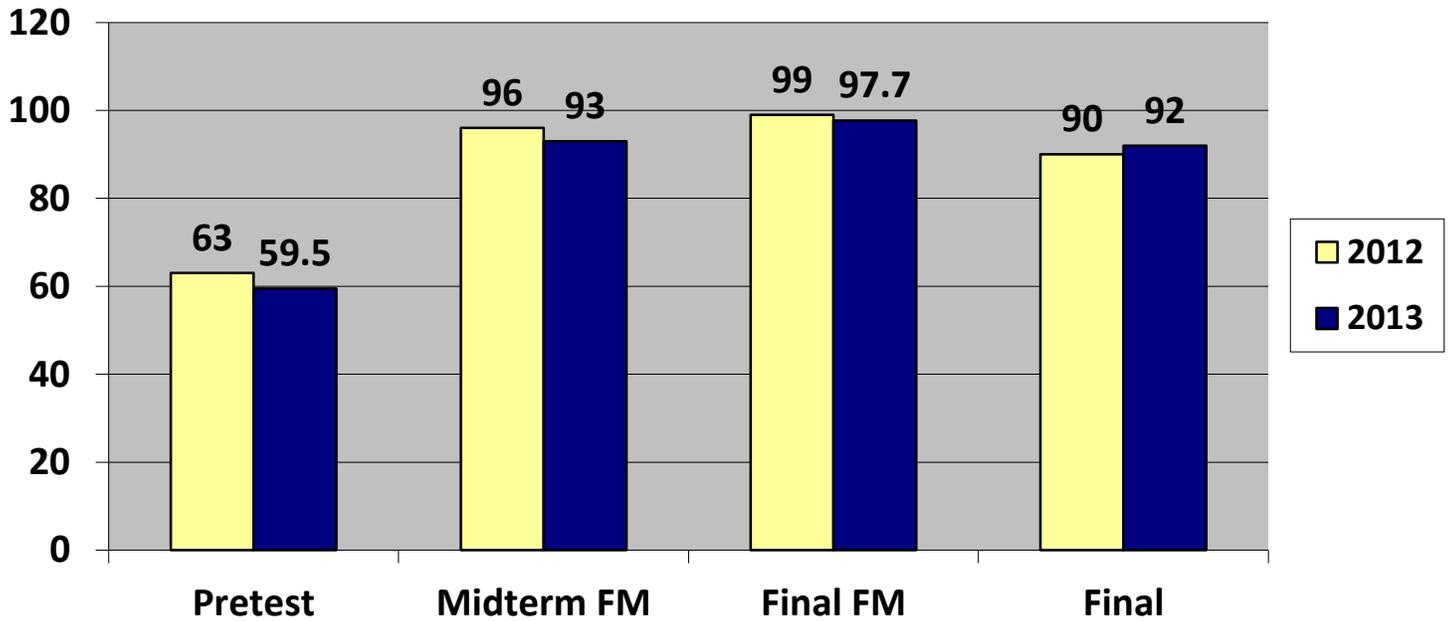
Respondents were asked to rate each of the sessions offered at the workshop. The 79 responses were as follows:

<u>Session</u>	<u>Very Good</u>	<u>Excellent</u>	<u>Total 2013</u>
<i>Counseling</i>	29%	58%	87 %
<i>PJ &amp; Verification</i>	20%	38%	58 %
<i>Federal Methodology</i>	26%	55%	81 %
<i>General Provisions</i>	32%	55%	87 %
<i>Title IV Programs</i>	28%	54%	82 %
<i>Packaging &amp; Budgeting</i>	35%	52%	87 %
<i>NYS Programs</i>	34%	48%	82 %
<i>Federal Loan Programs</i>	22%	46%	68 %
<i>Pell Grants</i>	20%	48%	68 %
<i>Civil Disobedience</i>	18%	60%	78 %
<i>Veteran Services</i>	15%	23%	38%
<i>Institutional Methodology</i>	45%	23%	68%

The following is a summary of the overall progress of workshop participants listing all test scores and comparing them to last year's scores:

**Test Scores**

(% of 100)



**Types of Institution/Affiliation**

**Regional Breakdown**

<b>Private College</b>	<b>80</b>
Public College	15
Proprietary College	6
Other/Non Specified	15
Grad/Professional	2
Lenders	0
<b>Total</b>	<b>118</b>

Region I	6
Region II	4
Region III	23
Region IV	2
<b>Region V</b>	<b>58</b>
Region VI	23
Region VII	1
Region VIII	1
Not Affiliated	0
<b>Total</b>	<b>118</b>

Over 83 percent of the respondents stated they would recommend novice training to their colleagues. Overall, Novice 2013 was a very successful week and many new contacts and friends were made!

We will continue to research and compare prices to help reduce our expenses and training manual updates will soon begin for Novice, 2014.

Respectfully Submitted,

Lisa Simpson, Co-Chair

Lisa Papke, Co-Chair

## **Scholarship Committee**

The scholarship committee met by conference call in September to select the recipients of the 2012 NYSFAAA Scholarships.

Recipients were selected in each of the 5 categories.

Direct donations were received totaling \$804.00, and the raffle at the conference yielded \$1,769.

The committee will be contacted later in the spring to discuss our current processes and alternative or additional activities that we can try to increase income for the scholarship fund. I have received word that Bill Cavin is once again running the Golf outing at the conference in October, which will generate additional income for the scholarship fund.

I will also discuss with the members the possibility of having two or three (if there are enough volunteers) committee members from each region. I think this would be a good idea as it will give the region a chance to have more than one person making the decisions on the candidates.

I have not had a chance yet to contact any potential new committee members.

I have been contacted by a NYSFAAA member representing one of our regions who has asked that Exec Council discuss the possibility of making our scholarship limited to students who are either U.S. citizens or eligible non-citizens. The concern centers on the perceived inequity of awarding a scholarship to an international student who is required under the terms of their visas to have sources of funding to cover their costs and therefore may be assumed to have less need, even though that need cannot be demonstrated, and citizens (or eligible non-citizens) who often have been required to assume significant amounts of federal or private educational loans to pay for their degrees. Although I am unable to attend this meeting, I will be happy to discuss this situation and the council's decision.

Respectfully submitted,

Debra Evans

Chair, Scholarship Committee

As of June 2013

## **School Outreach and Early Awareness**

The School Outreach Committee is led by co-chairs: LaSonya Griggs, Rachel Barker and Gene Rogers

## **High School Counselor**

### **High School Counselor Workshops 2012**

Counselor workshops were held this past fall across 7 regions with Region 5 participating in the Westchester Guidance Expo. NYSFAAA partnered with HESC to host 10 workshops serving over 700 participants. Invitations were extended to over 5,000 counselors/schools.

The same agenda was used for all 7 regions:

Financial Aid Application Process  
Special Circumstances and Financial Aid  
Comparing College Costs – Net Price Calculators, Financial Aid Award Letter Review and Shopping Sheet  
Creating a College Going Culture  
Youth Ambassadors  
Region 2 also held a novice session for new counselors

NYSFAAA held two sessions at the Westchester Guidance Expo, Financial Aid 101 and Federal and State Updates (partnered with HESC).

All sessions were well received. Evaluations were very positive for the most part. Some counselors felt the Creating College Going Culture was not appropriate for a financial aid workshop while others were very appreciative of the session. The Youth Ambassadors were very professional in their presentations and the counselors responded very positively. Special circumstances have been covered a number of times in the past few years however it seems that the counselors still have many questions and new questions each year.

Suggested topics for future workshops include HEOP-EOP, outside scholarship information, FAFSA and CSS Profile demonstrations, undocumented students and filing financial aid for same sex partners due to marriage recognized in NY but not federally. Another suggestion was to create a FAQ prior to the workshop with some of these topics covered to allow counselors to take back to their offices to share with their colleagues.

I'd like to take this opportunity to thank Lisa Simpson, Mike Turner, and Joe Gorman as well as those behind the scenes for their assistance with coordination of all of these workshops and participation as presenters. Members of NYSFAAA also did an outstanding job with their presentations and coordinating the events at each location. Volunteers handled the registration and presentations throughout the morning event. Each will be recognized in the final report.

Pat Johnson

## State Government Relations

NYS Government Relations Committee for 2012-2013

There was relatively little new activity from the committee during this year. With the loss of 4 committee members at the beginning of the year, it was difficult to get a jump start on activity.

Based on volunteer solicitation at the NYSFAAA conference, I had several people indicate interest in serving on the committee. I was never able to get them all together for a meeting or even a conference call, as I had little response when putting notifications out there.

Scott Atkinson, presented the white paper report on TAP reform to state government representatives with positive response. The TAP White Paper was developed during 2011-2012 as a response to the TAP survey that was completed during Fall 2011. It was determined that TAP reform should be a platform issue to which the NYSGRC keep at the forefront.

As a result, I was forwarded information from Scott regarding the formation of the TAP Coalition, which is a group of various constituencies brought together to develop a comprehensive platform for TAP reform. The group that has spearheaded this effort is NYPIRG (New York Public Interest Group) I have met with this group several times a month since June 2013 and we are now finalizing several items. They include the following:

1. Letters to NYS government leaders, Senator LaValle and Assemblywoman Glick, regarding TAP reform and request for public hearings across the state regarding the various TAP issues.
2. A statement of principles and operating guidelines for the coalition. This is where I would seek endorsement from Scott to continue working on the Coalition and seek support for the initiatives of the Coalition.
3. The formal Coalition to Reform TAP platform. The many points for TAP reform that were presented in NYSFAAA's white paper are now part of the formal platform of the Coalition.

Once these documents are finalized, I will forward them on, specifically for the endorsement of NYSFAAA to the issues of the platform developed by the Coalition.

Currently, I have not had any specific outreach to potential SGRC members.

Sue Mead

## **Statewide Training**

The NYSFAAA Statewide Training Committee held a total of 11 webinars between September 2012 and August 2013. The sessions were well attended and received extremely positive reviews. All of the sessions can be found on the NYSFAAA website (under the Events section, then click on Training). The Committee itself grew in size mid-year. It now consists of 2 co-chairs- Howard Leslie and Kristina Delbridge, and five more dedicated Committee members- Perry Brown, Anne DelPlato, Loren Fuller, Wendy Rizzo, and Angela VanDekker - who are helping to make each webinar a success.

Over the past year, we have worked closely with TICC for webinar set up and scheduling and the Membership Committee to check eligibility of those requesting to view our sessions. Their assistance is deeply appreciated. We are hoping to continue to streamline workload and processes over the next year with assistance from these committees and software changes that are already being planned.

In the 2013-2014 year we are tentatively planning 9 sessions. We have already held our first session in September, with our next sessions scheduled for October 22 and November 7. We are excited for another year of training for our membership and hope that our members will continue to utilize this opportunity during their professional development.

Kristina DelBridge

Howard Leslie

## **Technology, Innovation and Communication**

Technology, Innovation, and Communication Committee  
2012-13 Year End Summary  
Submitted: September 2013

### Goals Met:

- ❖ Developed detailed schematic of our committee and social media functions.
- ❖ Coordinated with Statewide Training to assist with set-up, running, surveying, and promotion of webinars.
- ❖ Maintained sites and increased participation in NYSFAAA Facebook, Twitter, LinkedIn, and Empire Chat.
- ❖ Developed and presented a Blog Presentation.
- ❖ Created Operational Calendar.
- ❖ Represented at the 2012 conference with an informational table and a presentation on social media.

### Future Goals:

- ❖ Continue to be available to Executive Council, regions, and committees in meeting their technology needs.
- ❖ Continue our own research on products, software and websites that can help NYSFAAA to be more efficient and effective.
- ❖ Support and contribute to the further growth of the website.
- ❖ Heavily promote dialogues on Empire Chat.
- ❖ Represent at the 2013 conference at an informational/sign-on table.

### Summary:

It was a year of change for TICC. We spent a great deal of time reviewing and restructuring in light of Executive Council's expansion of our committee which is now known as the Technology, Innovation, and Communication Committee. We now oversee the website and blog as sub-committees of TICC. Our structure was outlined in a hierarchy/communication flowchart.

We saw an overturn in our committee members, making continuity a challenge. However, we have maintained wide representation from across the state and have executed our goals well.

We conducted outreach to Executive Council, regions and statewide committees to offer our services. We were instrumental in developing the Intermediate Workshop Survey for the Leadership Academy Committee, and played a key role in supporting the Statewide Training Committee's webinars.

We investigated options for additional document storage for committees and Executive Council. We also assisted with details related to an interface between our membership database and GoToWebinar.

Sarah Macri

Lea Nuwer

## **Treasurer's Report**

Treasurer's Annual Report  
October, 2013

### 2010-2011 and 2011-2012 Audits

We continue to work with Arcara & Borczynski LLP to complete our audits and get up to date. The 2010-11 audit has been completed, 2011-12 has been reconciled so the audit may now be completed. This is anticipated to be completed by the end of the year. 2012-13 should be ready to submit for audit by the end of the year. Now that our accounts are reconciled up through June 2012 the reconciliation responsibilities will begin again.

The transition from HSBC to First Niagara has gone fairly smoothly. The previous discussion of having all regional accounts in one bank as a sub account of our main checking account has been put on hold. There are no First Niagara branches downstate nor is there any other bank that has a branch in every region. This does not create a problem for online banking; however, it does create a problem for changing of signatures on the accounts.

We have a new Treasurer-Elect, Kerry Lubold, and the transition/training will begin with the October conference. Thank you to Steve Dwire for all of his hard work and assistance with the transition.

Respectfully submitted,

Pat Johnson  
NYSFAAA Treasurer

## Regional Reports

### Region II

Region #2 Report  
NYSFAAA Exec Council Meeting  
Huntington Hilton, Long Island  
October 14, 2013

#### Region 2 Meetings

##### September 14<sup>th</sup>, 2012 - Region 2 Meeting - Held at Nazareth College

- **Training Topic:** Program Review, presented by Cindy Kolhman
- 25 members attended

##### November 16<sup>th</sup>, 2012 Region 2 Meeting - Held at SUNY Geneseo

- **Training Topic:** Anne DelPlato, Regional Director, Nelnet Federal Loan Servicing presented “Counseling Students Using Social Media”
- 19 members attended

##### December 14<sup>th</sup> 2012 Region 2 Meeting - Held at the Back Nine Grill, Pittsford, NY

- **Training Topic:** Katrina Delgrosso, College Board, presented, “Trends in College Pricing/Trends in Student Aid”

##### February 8, 2013 Region 2 Meeting - Held at Genesee Community College

- **Training Topic:** Loan Repayment Plans-IBR and Pay as your earn, making repayment possible

##### March 7<sup>th</sup>, 2013 Region 2 Meeting - Held at Roberts Wesleyan College

- **Training Topic:** Jim Briggs Tax Detective Webinar

##### September 20, 2013 Region 2 Meeting Held at SUNY Geneseo

- **Topics and Training details:**
  - NYSFAAA Update** – NYSFAAA President Scott Atkinson
    - Conference 2013- Long Island
    - Intermediate Training - 11/13/13 – 11/14/13, Albany Hilton \$125 registration fee
    - CAMP ...Communication...Advocacy...Mentoring...Planning

**Federal Update** - NYSFAAA Federal Relations Committee

- New Direct Loan rates effective 7/1/13 - Chris Vernam SUNY Alfred
- President Obama's Accountability, Innovation, Affordability Plan
- 150% Subsidized Rule..Academic Award Year/ Loan Period Year

**NYS Update** - NYSFAAA State Relations Committee

- TAP Reform proposal

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

- **December 7th, 2012 - High School Counselor Workshop** Our annual High School Counselor Workshop was held at SUNY Brockport with 45 counselors in attendance from Region 2. Scott Atkinson and Nancy Vanzetta send mucho thanks to the following colleges for donating raffle gifts to be used at the conclusion of the workshop; Alfred State, SUNY Geneseo, SUNY Brockport, RIT, U of R, Roberts Wesleyan, St John Fisher, Nazareth,, Monroe Community College, Finger Lakes Community College and Genesee Community College. Special thanks go to Loren Fuller from Alfred State who updated both the Financial Aid and EOP/HEOP Directories for the Region. This year we were able to see that every counselor received something.
- a. **January 27, 2013 - College Goal New York - Held at East High School, Rochester, New York**  
Toni Greelee thanked Region 2 for a really great College Goal New York at East High School! 70 volunteers helped 172 students file their electronic FAFSA and gave them the information they need to complete their TAP application (if they didn't on Sunday), apply for scholarships, and file their tax returns for free. Oh, and cookies! (Thanks to Anne Barton for donating cookies and juice.) All in all, a REALLY good day!
- b. **February 7<sup>th</sup>, 2013 - College Goal New York - Held at the GCC, Warsaw Campus, Warsaw, NY**
- c. **June 11, 2013 Support Staff Workshop** - Held at The College at Brockport, 20-25 attendees and workers participated

**Other Regional events:**

- d. College Night at Marketplace Mall 09/25/13

e. College Night at Greece Ridge Center Mall 09/26/13

**Upcoming Events:**

- High School Counselor Workshop, November 22, 2013 at Nazareth College

Respectfully Submitted,

Lisa E. Papke

NYSFAAA Region 2 Executive Council Representative

October 14, 2013

## Region III

### Region 3 Report

#### NYSFAAA Exec Council Meeting

Date October 2013

### 1. MEETINGS SINCE LAST OCTOBER EXEC COUNCIL MEETING

#### *September 27, 2012 at SUNY Oswego's Fallbrook Lodge*

Discussion: Recent Exec Council report by Dawn Langdon

Training topic- Sarah Macri and Julie Rehder from the NYSFAAA Technology & Innovation Committee presented on social media for the FA Office—Twitter, Facebook and LinkedIn.

Bonnie Rooker presented the Robin Jaycox Region 3 Service Award to Darrin Rooker.

Treasury has \$3198.67 in it. Haven't received revenue sharing checks recently.

Kathy Flaherty gave the State Update that Lisa Simpson had provided to her since no one was able to make it to the meeting. The feedback on DocTrac was excellent. Also, Region 3 members were wondering about the phone number for the new National College Finance Center.

#### **News:**

Chris Walsh has retired from Say Yes. Say Yes staff member Ahmeed Turner and Danielle Griggs were also in attendance and discussed the FA Counselor Network that is being put together in Syracuse for the local school districts.

#### *November 2, 2012 at LeMoyne College*

Discussion: Recent Exec Council report by Dawn Langdon

Training topic- John View and Carlos Adrian presented training on the shopping sheet. Carlos gave the perspective of a private school (SU) and John gave the SUNY perspective.

Committee Reports were given by College Goal Sunday and High School Counselor Workshop.

- College Goal Sunday
- 5 year contract ended and have to apply again and will be notified by November 15.
- Syracuse school district picked by Dept of Education for a FAFSA completion project. They want to see how many students complete the FAFSA.
- We are already doing a lot of the things the Department of Education recommends

Treasury has \$2802.42 in it. Region 3 was selected as the Region for the 10-11 audit and did great.

***December 7, 2012 Justin's Tuscan Grill***

**State Update:**

1. January is Financial Aid Month. HESC will have call in phone Tuesday/Thursday to chat. Let HESC know if you are doing anything and they will try and promote it.
2. Erica Terwilliger is leaving HESC for SUNY Central. Lisa Hurley will cover her work.
3. HECS Financial Coaching service training on website.

**Committee Reports:**

1. College Goal Sunday in Syracuse 2/2/2013 and 3/9/2013
  - a. Looking for volunteers at Utica site
  - b. 1/19/2013 and 2/9/2013 SUNY Financial Aid Day
  - c. College Goal Sunday managed by HESC – should be up soon

**Training:**

Roundtable discussion concerning the FSA Conference was led by Darrin Rooker. Those present that attended the FSA Conference: Darrin, Jackie Darquea, Sharon Karwowski and Tammy Oliver. Topics of concentration:

1. Clearly the intent of the Department of Education is to not have schools verifying everything. They only want schools to verify what is selected.
2. PowerPoint presentation will be up on the FSA website.
3. Shopping Sheet is voluntary this year unless your school signed the VA commitment

**News:**

Region 3 typically collects toys for Toys for Tots at this meeting. It was decided that instead the Region members would bring gift cards for our colleagues that were affected by Hurricane Sandy. These were collected and sent to Wayne Harwood for distribution.

Guidance Counselor workshops were held in November and had 135 participants.

***March 8, 2013 Tompkins Cortland CC***

***May 3, 2013 Owasco Country Club, sponsored by Cayuga CC***

Attendees = 23 on March 8<sup>th</sup>, 20 on May 3<sup>rd</sup>

March 8<sup>th</sup>-Sequester, Verification and the Shopping Sheet

May 3<sup>rd</sup>-Verification, New minimum wage and works study, student workers and health insurance, shop talk

**Treasury update:** As of May 3<sup>rd</sup>, \$4848.09

**Retirements: Bonnie Rooker, Judi Miladin, Kaye Devesty, Sue Borden**

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

Region 3 Counselor Workshops held on November 16<sup>th</sup> in Binghamton

November 19<sup>th</sup> in Syracuse.

Support Staff Workshop-May 22<sup>nd</sup> , held at LeMoyne College

Attendees: 40

Presenters: John View, Laura Worley, Anne Kierney

Cost to attendees: \$10 subsidized by the Region

**4 Treasury update:** *Aproximately \$4400 as of September 2013*

**5 Upcoming meetings and events**

November, December, March and May—dates to be determined

## Region IV

# Region #4 Report

## NYSFAAA Exec Council Meeting

June 10, 2013

### 2. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: May 3 at Albany Law

Attendees = 16

▪ Topics and Training details:

- NYSFAAA update from President Scott Atkinson
- HESC Update by Lisa Simpson
- Membership update- 152 this year compared to 125 last year
- Treasury Report
- Executive Council Report- Alcohol Policy decision and next conference
- Pell Lifetime Limits
- UEH
- Current Pell Proposals
- Verification Process
- Federal Shopping Sheet Implementation

3. **Training events that Region was involved in :** College Goal Sunday events

4. **Treasury update:** \$ 4122 as of May 3, 2013

5. **Committee Reports:** Training Committee

6. **Conference news (If your region is involved in Conference planning):** none, other than that we have shared information with those that are planning now.

7. **Upcoming meetings and events:** 13-14 not planned yet

8. **Regional comments/Recommendations (If you region has a pressing issue that needs to be brought to the attention of Council):** We are just having a tough time getting people active.

As of June 2013

## Region V

# Region 5 Report NYSFAAA Exec Council Meeting October 14, 2013

### 9. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: No meetings

- 6 **Treasury update:** No change since last meeting
- 7 **Conference news :** - Elections complete:
  - a. Executive Council Representative – Roberta Daskin – Sarah Lawrence
  - b. Region Chair – Jarrett Foster – Mercy College
  - c. Treasurer – Perry Brown (re-elected) – College of Westchester
- 8 **Upcoming meetings and events** - TBD
- 9 **Regional comments/Recommendations** – The region is looking forward to having new leadership and to become more active

## Region VI

# Region 6 Report

## NYSFAAA Exec Council Meeting

Date: October 14, 2013

### 10. MEETINGS SINCE LAST EXEC COUNCIL MEETING

\*Date and Location: **September 28, 2012** – Region 6 Fall kick off meeting at Julliard.

Topics and Training Details: “Professional Judgment” – Heather McDonnall. Offered a preview membership, by allowing non NYSFAAA financial aid personnel to attend with the understanding that they will have to join NYSFAAA should they wish to attend another NYSFAAA event.

Attendees: Approximately 90 individuals.

\*Date and Location: **October 26, 2012**- Region 6 Meeting at NYIT at Columbus Circle.

Topics and Training Details: Training session on “Verification Changes for 2013-2014” provided by Nautochia Webb from the U.S. Department of Education. Offered another preview membership, by allowing non NYSFAAA financial aid personnel to attend with the understanding that they will have to join NYSFAAA should they wish to attend another NYSFAAA event.

Attendees: Approximately 40 individuals.

\*Date and Location: **November 16, 2012** – Region 6 Meeting at Teacher’s College. CANCELLED due to not being able to confirm availability of presenter.

\*Date and Location: **December 14, 2012** – Region 6 “Holiday Meeting”.

Topics and Training Details: Agenda items included a State Update and Federal Update.

Attendees: Approximately 50 individuals.

\*Date and Location: **February 22, 2013** – Region 6 Meeting at NYIT at Columbus Circle.

Topics and Training Details: Training on Pay As You Earn presented by Stephen Brown – Assistant Dean, Fordham University School of Law.

Attendees: Approximately 50 individuals.

\*Date and Location: **April 19, 2013** – Tri-Regional Meeting at Borough of Manhattan Community College.

Topics and Training Details: Training on Federal Update presented by Nautochia Webb- U.S. Department of Education. Financial Aid Issues in a Global World: Study Abroad and International Students presented by Father Tyrell – Director- Duchesne Center & Study Abroad Program, Manhattanville College and Debra Evans – Senior Associate Director of Financial Aid, Adelphi University. HESC Update presented by Michael Turner – Client Relations Manager, HESC. Guide to Finding Financial Aid Resources When You Need Them presented by Heather McDonnell – Associate Dean of Enrollment and Financial Aid, Sarah Lawrence College. Income Driven Repayment Plans presented by Anthony Sozzo – Associate Dean for Student Affairs, New York Medical College.

Attendees: Approximately 92 individuals.

\*Date and Location: **May 17, 2013** – Region 6 Support Staff Workshop at NYU – Poly Technical Institute.

Topics and Training Details: Training on Customer Service present by Student Financial Services from LIM College. FAFSA 101 presented by Lucy Villaquiran – Assistant Director of Student Financial Services – Monroe College. HESC 101 presented by Michael Turner – Client Relations Manager, HESC.

Attendees: Approximately 30 individuals.

Date and Location: **June 21, 2013** – Region 6 Summer Meeting at Belmont Park

Topics and Training Details: Training on Beyond Loan Counseling presented by Vincent Scalise-SALT – American Student Assistance.

Attendees = Approximately 40 individuals

\*Date and Location: **September 27, 2013**- Region 6 Fall Kickoff Meeting at Mercy College – Manhattan Campus.

Topics and Training Details: Training on Federal Update presented by Nautochia Webb – U.S. Department of Education. PELL LEU Calculation – Case Studies presented by Lucy Villaquiran – Assistant Director Financial Aid – Monroe College – Co-Chair NYSFAAA Region 6. Conflicting Information – Panel Presentation – Brian Ganoo - Compliance Officer, Fordham University, Linda Greene– Compliance Officer, Monroe College.

Attendees = Approximately 25

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

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

**November 30 postponed from November 2, December 7, 2012** Friday – “High School Counselor Workshop”. November 30 held at FIT, December 7 held at NYIT at Columbus Circle. It appears that attendance was impacted due to problems at their schools due to hurricane “Sandy”.

**February/March, 2013** – “College Goal Sundays”. Saturday, February 2, at Wagner College in Staten Island, Sunday, February 3 at Herbert H. Lehman H.S. in the Bronx, Saturday February 9, at John Bowne H.S. in Queens, at Philip Randoph Campus H.S. in Manhattan, at Kurt Hahn Expeditionary Learning H.S. in Brooklyn, Sunday, February 10 at Medgar Evers College in Brooklyn, Thursday, February 21 at Harriman Club House in Manhattan, Friday, March 1 at H.S. of Telecommunication & Arts in Brooklyn.

11 **Treasury update: Approximately \$5000 balance in account.**

12 **Committee Reports**

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

14 **Upcoming meetings and event**

October 25, 2013 – High School Counselor Workshop at Fashion Institute of Technology.

November 22, 2013 – High School Counselor Workshop at Marymount Manhattan College.

December 13, 2013 – Region 6 “Holiday Meeting”. Location TBA. Tentative Agenda: U.S. Department of Education’s Institutional Improvement Specialist (IIS), NYSFAAA Blog Training, Loan Servicer Panel, Veteran’s Benefits.

January/February, 2014 – “College Goal Sundays”.

February 20, 2014 – Region 6 Meeting. Location TBA. Tentative Agenda: Default Prevention, Shopping Sheet/Award Letter, Customer Service.

April 11, 2014 – Tri-Regional Meeting – Location TBA (possible locations Teacher’s College/Monroe College/Poly Tech). Agenda – TBA.

May 9, 2014 – Region 6 Meeting/Support Staff Workshop. Location TBA. Agenda – TBA.

June, 2014 – Region 6 “Summer Outing”. Location TBA. Agenda TBA.

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

## Region VII

# Region 7 Report

## NYSFAAA Exec Council Meeting

Date : 10/14/2013

Submitted by

Gene Rogers

### 1. Region 7 Meetings since conference 2012

**Nov 16<sup>th</sup> 2012- Location NYCOM- Old Westbury**

**Attendees - 26**

Topics and Trainings

Presentations included a Skyped in session from Scott A. A HESC update from Mike Turner which included some TAP updates and APTS updates. We had discussions on the upcoming conference. We also took part in a NASFAA webinar on the proposed shopping sheet info.

**Dec 5<sup>th</sup> 2012 (Holiday meeting/party)**

**Location- Milleridge Inn- Jericho**

**Attendees- 26**

Our main presentation was done by a Doctor Hassan on work place morale. Gail and Tanya gave some updates on the conference progress and also continued on a call for volunteers. We also had a HESC update from Mike Turner

**Feb 8<sup>th</sup>**

**NYIT – Old Westbury**

**Attendees- 31**

We featured a federal update from Natoucha Webb, she touched on topics ranging from the 150% rule, new verification among others.

**May 10<sup>th</sup>**

**Molloy College- Rockville Centre**

**Attendees- 30**

The agenda was on repayment issues and concerns. We had two presentations on the subject. One of them was done by Heather McDonnell and the other was conducted by a panel from Sallie mae Judy Grassi and Jeanne McCarthy

**June 7<sup>th</sup>**

**George Martin Restaurant- Rockville Center**

**Attendees- 16 (Weather played a bit issue in the low turnout)**

The meeting was billed as our “summer outing” and it was held at the George Martin restaurant in Rockville Centre. Our agenda consisted of a federal update conducted by

Nautochia Webb along with a presentation on Effective communication that was done by Dr Hassan Abdulhaqq. We had a closing session on “how to relax and rejuvenate” as well that Ms Webb headed. I gave a little Exec council update looking for suggestions and comments to bring back to council and spoke a little on membership and the conference.

**Sept 27<sup>th</sup>-**

**Five Towns College- Dix Hills**

**Attendees- 23**

The agenda consisted of the welcoming of the new regional officers, and an update on the upcoming Guidance Counselor workshop. The main focus of the meeting was all about the upcoming conference and get details finalized, etc. The meeting ended with a call for volunteers for some committees.

2. **Trainings-** Over the course of the past year, our region was involved in CGNY, the Guidance Counselor workshops, Novice, and the Tri-regional meeting along with our main focus of NYSFAAA 45.

3. **Treasury update...** As of 9/30/13- \$2313.45

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

5. **Conference News-** All ready for NYSFAAA 45 (Government shutdown or not)

6. **Upcoming meeting**

We plan to have our next meeting in early Dec 2013..but have not yet finalized details

- 7.- **Regional comments** – N/A

## Region VIII

# Region VIII Report

## NYSFAAA Exec Council Meeting

June 13-14, 2013

### 11. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: February 28- SUNY Canton  
Attendees: 23 in attendance

Date and Location: April 15, 2013- Conference Center Lake Placid  
Attendees: 14 in attendance

### 16 Other Training events that Region was involved in :

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

College Goal NY:

Stacey Hawkins reported on College Goal NY which was held February 2nd at Clarkson University. Although a small turnout of 11 families the volunteers were able to provide one-on-one assistance to those families. There will be (5) 500.00 need based scholarships awarded from those participants chosen by HESC.

### 17 **Treasury update:** February Meeting: There was a check for 251.00 written to pay for lunch at the current meeting. The current balance is 4325.56.

April meeting: Susan Godreau reported a current account balance of \$4,325.56, with no activity since the last report. Kerrie Cooper inquired if SUNY Canton has billed for the lunch from the last meeting and Susan will research.

### 18 **Committee Reports**

**Membership:** February meeting: Carolyn Corcoran reported on behalf of Amanda Prescott who was unable to attend. The last Membership Committee Meeting was on 1/11/13. The committee is actively recruiting membership from schools that are not part of NYSFAAA. Recruiting emails have been going out which have included current members in the distribution. The committee is promoting events as reasons to join. There is currently discussion going on now regarding a possible switch from individual member fees to an institutional membership fee structure. As of 1/11/13 our Region has 45 members, up 2 people from last year. An active listing from January 11th was passed around for members to look at.

April meeting: The current list of active region members was distributed for review and everyone was encouraged to update their membership if not current, to be reachable via

listserve communications and other activities. Theresa Chastain advised that the list did not include associate members and Carolyn confirmed that there have been some technical difficulties in retrieving membership data. Carolyn reminded us that the steering committee listserve is currently managed through SUNY Potsdam. NYSFAAA recently signed a corporate contract with GoTo meeting, allowing access for up to 20 users at a time. Amanda Prescott has offered to help train those interested in using its services. Karen Blankenburg advised that join.me also offers free meeting services, in a similar style as Skype.

**Technology and Innovation Committee:** Membership Committee and TIC are now approaching Ideta Danel with the notion of turning our current static online brochure for membership into a dynamic, constantly updated website that shows pictures and content from current or recent meetings, conference, and/or trainings. There was an explanation of the definition and use of each one of the types of medium. The listservs should be used for announcements, invites and regulatory questions. The Blog used as a sounding board or a place for articles. The website is for all types of information, Calendars for events, and an anchor for membership services. The Social media would consist of Facebook and Twitter feeds.

**Mentoring Update:** Kerrie Cooper has reached out to two new employees both from Clarkson but has yet to hear from either.

**Government Relations Update:** There is still no Region VIII member on the Federal and State Committee. Rebecca Vinopaul indicated she had expressed interest but had yet to hear from John View regarding the detail of the Committee.

- 19 **Conference news (If your region is involved in Conference planning)** Carolyn shared the news of the passing of Ed Trathen, Vice President for Enrollment Management and Student services at NCCC. There has been a scholarship set up in his name at NCCC. Kerry Cooper made a motion to have 50.00 of our funds to be donated on behalf to Region VIII to the scholarship if there are no restrictions to the use of the budget funds to do such. All attendees were in favor. Kerry Lubold will contact the NYSFAAA audit committee to make sure there are no issues with doing such a donation.
- 20 **Upcoming meetings and events**
- 21 **Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council)**

As of June 2013