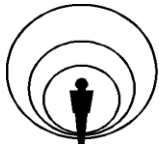


**NYSFAAA**

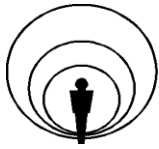
**New York State Financial Aid Administrators Association, Inc.**

# **2013-2014 Annual Report**





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## President's Remarks

### NYSFAAA President 2013-14 Annual Report

I can't believe that I am actually sitting down to write my last President's Annual Report. It does seem like it was just a short time ago that I first became NYSFAAA President Elect and then President rather than three years ago. As always, time passes quickly in the financial aid profession and it seems like holding an office such as this only exacerbates the situation. Also, as normal, there is always more that I wish I could have accomplished but when I look back and review all of our activities and projects of the past couple of years, NYSFAAA has accomplished much.

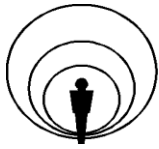
I must also acknowledge that it has not been due to my efforts but to these myriad of volunteers, committee chairs and members, our regional officers and councilpersons, and the current slate of officers that have caused NYSFAAA to be so successful. I continue to be amazed at how an organization of volunteers such as our own can undertake so much. Now the largest state association ever, NYSFAAA continues to lead and serve as a model for other such organizations.

I do want to give kudos to our dedicated NYSFAAA officers. Besides being able to put up with me, they have been a great team to work with. I have dealt with many committees and organizations over the past many years but I have never experienced such a cohesive and supportive group such as this one. They have taken on some monumental tasks and worked closely together to maximize our efforts and to promote NYSFAAA. So my own very personal thanks to:

Janice Scheutzow, First Vice President – Nazareth College  
Jane Gilliland, Second Vice President – Alfred State  
Kathleen Flaherty, Secretary – SUNY Oswego  
Patricia Johnson, Treasurer – Syracuse University  
Kerrie Cooper, President Elect – SUNY Canton  
Kerry Lubold, Treasurer Elect – SUNY Plattsburgh

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

Sean Hudson – Region 1  
Melissa Casselman – Region 2  
Darrin Rooker – Region 3  
Kristina Delbridge – Region 4  
Roberta Daskin – Region 5  
Lucila Villaquiran – Region 6  
Gene Rogers – Region 7  
Todd Moravec – Region 8  
Lisa Simpson – HESC Liaison



First, I am encouraged to see so many new faces on Executive Council. One of my personal goals has been to move some new blood into NYSFAAA leadership positions. Our new members have brought a fresh perspective and new synergy with the returning council members. 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 you may know, I have used the acronym C.A.M.P. to describe my goals over my tenure as president. It stands for the areas or activity that I wished to concentrate on; communication, advocacy, mentoring and planning. I do feel that together, we have had significant success in these areas.

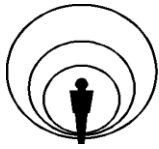
## Communication

Communication has received a special emphasis this last year be it with or among members including our new affiliate, committees, Executive Council and other financial aid related organizations. Use of the list serve as well as the blog have helped to keep us all informed and engaged. Our Technology, Innovation, & Communications Committee (TICC) was able to meet their social media and blog expansion goal. However, this is still an area that is being underutilized. Our blog, *Empire Chat*, provides an easy means of communicating with each other, debating issues & stimulating discussions. More of our membership need to subscribe and use this valuable tool.

Last year in an effort to expand our communication efforts to a larger constituency, we created the affiliate membership category. Pulling in non-aid campus administrators, high school counselors, student interns and others has increased our outreach capabilities. Involving them more closely with our activities, we are able to expand our scope and secure allies in support of our aid programs and in the dissemination of information. As this particular classification of membership continues to grow, we need to keep their needs and scope in mind.

## Advocacy

Efforts in this area have been constant and on-going. We continue to push for the reform of the New York State Tuition Assistance Program (TAP). In addition to our usual activities such as working with the Coalition to Reform TAP, Advocacy Day in Albany, press conferences and legislation meetings, we also undertook a grassroots campaign to reach out to all state legislators to discuss our White Paper on TAP Reform and the need for data to support our position. These efforts are continuing as we attempt to contact all 202 state senators and assembly persons. So far, we have personally contacted 35%. Special recognition needs to be given to regions 2, 3 & 5 for contacting all of their legislators. Although we did experience some success this last year with a small TAP increase, we need to continue to push for greater simplicity, transparency and consistence with the federal aid programs to make TAP an even more valuable and effective aid program for the students of New York State.



Another recent activity has been the preservation of the Federal Perkins Loan which is due to expire on 9/30/15. A coalition comprised of NYSFAAA, the State University of New York Financial Aid Professionals (SUNYFAP) and the Coalition of Higher Education Assistance Organization (COHEAO) has been formed for this purpose. Bi-weekly conference calls for planning and updates are helping to bring this issue to the forefront of federal legislators so that this valuable program can be considered in the discussion regarding the reauthorization of the Higher Education Act 2014. I wish to officially acknowledge the efforts of Maria Livolsi, COHEAO President and Mark Hill, SUNYFAP President as well as the entire joint task force for their efforts in this area.

This is an area that I feel we still need to improve on in the future. Our Government Relations chairs (Sue Mead for state and John View and Maria DelInnocentiis for federal) have been quite active as well as the Executive Council. However, more needs to be done at the regional level. Some regions were very successful in their TAP Reform efforts but advocacy needs to become an important part of every regional agenda. This will become even more important as we move into active discussions on the Reauthorization of the Higher Education Act.

## Mentoring

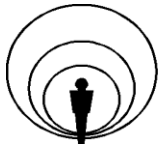
As usual, the summer Novice Workshop was an unqualified success. NYSFAAA's program continues to be a model emulated by other states and regional associations. NYSFAAA thanks co-chairs, Lisa Simpson & Lisa Papke, as well as the entire training staff for their work with our new professionals.

I also consider training to be a form of mentoring and once again, our Professional Development Committee under the dynamic team of Kristina Delbridge and Howard Leslie continues to provide relevant, timely and superior workshops and webinars to our membership. No other training at the state or regional level can compare to the excellent training opportunities that are provided to us.

The re-initiation of our Intermediate Workshop was also a successful event. Designed to provide training on more advanced topics and to help groom our future senior administration, this two day event was held last November. Attendee evaluations indicated that it was most helpful and that we should continue to offer this level of training in the future. Congratulations to Jane Gilliland and the workshop staff for their efforts.

Finally, I would classify all of our outreach activities ranging from our high school counselor workshops to College Goal New York as another major accomplishment. Teaming with the Higher Education Services Corporation, our outreach committee and chairs, Rachel Barker, LaSonya Griggs & Gene Rogers continue to reach an ever expanding number of persons through their outreach efforts.

As for the future, we need to continue to get newer members involved in NYSFAAA committees and activities. As some of us dinosaurs retire, new and energetic leaders in our profession must become involved and carry on our momentum.



## Planning (Organization)

Under our new strategic plan adapted this last year, we have set the path for our organization as well as provided a process and blueprint for the assessment of our activities. The Governance Committee will begin using this document as they evaluate our progress over the next few years.

The operational calendar created last year and posted to our website has proved to be a valuable tool to ensure that proper preparation is done and that all administrative deadlines are met. The calendar is reviewed at each Executive Council meeting and revised as necessary.

The holding of remote Executive Council meetings between our regular in-person meetings has also been successful in that it has reduced the agenda load of each meeting allowing for the consideration of additional topics and has proved to be a savings in time and for resources for our association.

One area where significant progress has been made over the past couple of years is in our fiscal management. Through the efforts of Pat Johnson, our Treasurer, NYSFAAA is in a much better fiscal condition. Over her term of office, she has been able to reconcile our account for the past several years and have them successfully audited. We are now capable of receiving timely and accurate financial reports that will greatly improve our budgeting and fiscal responsibility. She is to be commended for this.

Due to personnel changes, the Development Committee was not able to be fully initiated. The purpose of the committee was to assist the various standing committees and the Executive Council in securing funding and resources for desired projects and events through fund raising, grant proposals and other means. Under the new leadership of Tami Gilbeaux, this committee could prove to be a valuable resource to NYSFAAA. Anyone wishing to assist in this endeavor, please feel free to contact Tami.

## Summary and Review of Strategic Long Range Plan

I have also reviewed our accomplishments as they relate to our new *Strategic Long Range Plan, 2014-2017* and am asking our committee chairs to do the same. The Executive Summary lays out the basic goals in operational terms:

- *Effectively inform policy makers and advocate for students*

This is an area where we have been quite actively involved this last year. There has been a number of legislative contacts made to promote TAP Reform but still further efforts are needed. The future of the Perkins Loan Program is now an urgent matter that we have been engaged at the federal level and Reauthorization of the Higher Education Act is just around the corner. More needs to be consistently done at the regional level, working with our representatives and actively advocating for our students and our aid programs.



- *Communicate with our constituent groups*

Communication is an ever present need. We do have the necessary tools but must continue to expand their use and better communicate with all our constituents including the students we serve and our new affiliate members.

- *Develop strong effective leaders who focus, guide and direct*

Progress has been made in this area. Building on the success of our Novice Workshop we have reinitiated the Intermediate Workshop. However, there is still a dearth of candidates applying for leadership positions in our offices and in our association. We must continue to address this issue.

- *Use resources well and, if possible, expand the pool of resources, i.e., money and member participation*

There has been a great improvement in the use of our resources this past year. Current fiscal records and improved budgeting practices will only strengthen our efforts. The revitalization of the Development Committee should also be an important asset to us.

- *Increase membership and member participation, provide targeted mentoring*

This has been a topic of discussion at Executive Council meetings. Participation at the regional level must be increased and strengthened. The NYSFAAA Membership Committee has done well but more grass root efforts and mentoring is needed. More members, particularly newer ones need to be engaged.

- *Emphasize our ethical foundations*

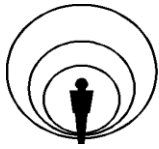
This is an area where additional attention could be focused. This is not to say that we do not have a strong ethical foundation but we do need to periodically review this and educate the membership in this area.

- *Offer quality professional development opportunities*

As stated before, this is an area of unqualified success. We need to continue to offer superior training and development opportunities reflecting the needs of our profession.

As stated in this report, we have met or made progress on these goals. However, there is still much to be done as we look to the future and I am confident that we have the necessary resources to accomplish that.





As we move forward into this next year, I am so pleased that there are some dedicated and competent individuals to assume major leadership roles in our organization. Kerrie Cooper will now be your next NYSFAAA President. Kerrie has grown up in financial aid beginning as a work-study student at SUNY Potsdam and through graduate school at SUNY Albany. The beginning of her professional career was at Monroe Community College before eventually coming back to her north-country roots as Director of Financial Aid at SUNY Canton. She has seen many changes in the financial aid process over 30+ years. She has served on the Executive Councils of both NYSFAAA and SUNYFAP. In NYSFAAA, Kerrie served as 1<sup>st</sup> Vice President and Region 8 representative, she has also served as President, Vice President, Secretary and Member at large in SUNYFAP. She has worked on several conference committees, including chairing the 1999 & 2006 NYSFAAA conferences in Lake Placid and current co-chair of the 2014 conference.

Kerry Lubold is also beginning her tenure as NYSFAAA Treasurer. She was employed as a work-study student in the Financial Aid Office at her college in Pennsylvania while pursuing a degree in Business Economics. Following graduation, Kerry worked for three years in financial aid at Immaculata College, now Immaculata University. Kerry joined the staff at SUNY Plattsburgh in 1999 and immediately participated in the 1999 Lake Placid Conference Planning Committee. Over the years since, she has become involved with NYSFAAA in many ways including conference 2006 program co-chair, school counselor and Support Staff Workshop co-chair, region 8 co-chair, region 8 councilperson, conference presenter, Novice small group leader and Finance, Audit & Budget Committee chair.

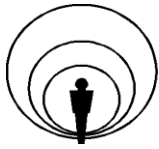
We also welcome back Howard Leslie of Berkeley College who is reassuming the role of Second Vice President. Howard is very familiar to anyone that has attended any of our NYSFAAA webinar series and brings a wealth of expertise to the position.

Finally, I would be remiss if I did not thank my supervisors at The College at Brockport for allowing me to hold this position and a special thank you to my office staff who were all impacted and helped to take up the slack in my absences.

So you can see, we have accomplished much and have much to look forward to and to do in the future. I again thank the membership for the opportunity to serve as its President. I do consider it to be the capstone of my over 43 years in the financial aid profession. I can only hope that I have been able to justify the trust you put in me and as with any time you go CAMPing, I hope that I am able to say that I left it at least a little better than I found it.

Sincerely,

J. Scott Atkinson  
NYSFAAA President  
The College at Brockport  
Director of Enrollment Services



## Awards Committee

### **Committee Members:**

Troy Martin Co-Chair  
Robert Zasso Co-Chair  
Region 1 - Mary Koehneke  
Region 2 - Susan Romano  
Region 3 - Dawn Langdon  
Region 4 - Brian Smith  
Region 5 - Rob Zasso  
Region 6 - Maria Deinnocentiis  
Region 7 - Debra Evans  
Region 8 - Todd Moravec

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

Our goal for the 2014-2015 year is to increase nominations from the membership for the state wide awards.

Our long term objective is to promote the major points of the NYSFAAA long range plan by highlighting the aims of the plan through our award ceremony at the annual conference. Ideally each year we will be recognizing awardees that are strong examples of advocacy, outreach, mentoring, & fostering a strong financial aid community.

### **Summary of Activities:**

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 2014 awards. Though nominations have been low in number this year, a few more nominations were made by the committee during our selection meeting. We ended up with a good number of awardees and believe that we have adequately and appropriately honored deserving members with our final selections. We are hopeful that in the future members will take the time to nominate a deserving colleague.

After the 2014 conference, we plan to find a volunteers to replace Robert Zasso as our Region V representative as we were unable to find a replacement during the last year. We also welcome Brian Smith (Region 4) and Todd Moravec (Region 8) to the committee.

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

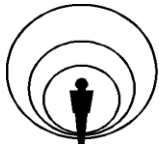
Our next meeting will be at the 2014 NYSFAAA Conference and then the next planned conference call will be in June 2015.

### **Recommendations:**

None at this time.

**Submitted by:** Troy Martin and Robert Zasso, Awards Committee Co-Chairs

**Date:** 9.29.14



## Conference 2014

### Committee Members:

Conference Co-Chairs:	Kerrie L. Cooper, Carolyn Corcoran
Program Co-Chairs:	Sue Merchant, Lisa Simpson
Facilities Co-Chairs:	Mary Ellen Chamberlain, Carole Jenne
Registration Co-Chairs:	Heather Adner, Susan Godreau
Vendor Chair:	Laura Helmich
Entertainment Chair:	Katrina Delgrosso
Technology Co-Chairs:	Todd Moravec, Kerry Lubold
Transportation Co-Chairs:	Shalena Duprey, Pat Farmer
Publicity Chair:	Pat Farmer

### Long Range Plan:

The NYSFAAA LRP mentions the annual conference in several places and almost all categories. It is the most important event of the year for the NYSFAAA membership. The LRP asks that the conference be as strong as possible in program content. It is also depended upon for its generated revenue for the organization.

### Goals and Objectives:

Our main goals and objectives of the annual conference are as follows:

- Provide informative and relevant content in conference sessions.
- Balance that with activities that allow the membership to de-stress and network with colleagues.
- End the conference with a positive revenue balance.

### Summary of Activities:

Planning for the NYSFAAA 2014 Conference began during the Fall of 2012. During the course of the last year the conference steering committee has met almost monthly to review committee progress toward the conference. These meetings were held both in person and by conference call. Activity over the last six months intensified as planning details were developed. A summary list of activities were:

- Regular meetings of the overall conference steering committee at least 3 of which took place at the Conference Center in Lake Placid.
- Individual committee meetings
- Program development including finalization of key note speakers and creating a diverse variety of concurrent sessions.
- Finalization of appropriate contracts (hotel, conference center, caterer)
- Development of publicity plan beginning with giveaways on banquet table at 2013 Conference in Long Island. Within final six weeks this has been a series of weekly emails which include a trivia question about the Adirondack Mountains.
- Finalization of entertainment events
- Review of technology needs for all sessions



**Upcoming Meetings and Events:**

The 2014 NYSFAAA Conference in Lake Placid “46 Years of Milestones One High Peak at a Time” is scheduled to take place October 21 – 23.

The Conference Committee will be meeting on Monday, 10/20 for on-site preparations.

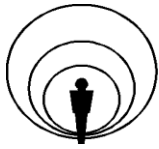
**Recommendations:**

Possible recommendations for future committees include (this list will be included in our Final Report but is not exhaustive):

- Policies and protocols regarding required registration fees for presenters needs to be discussed and clarified for future committees.

**Submitted by:** Conference Co-Chairs-Kerrie L. Cooper, Carolyn Corcoran

**Date:** 10.16.2014



## Conference 2015

### **Committee Members:**

Laura Worley (First Marblehead) Conference Chairperson  
Troy Martin (St Bonaventure) Program Chairperson  
Sean Hudson (Canisius) Facilities Co-Chairperson  
Leigh Bove (Great Lakes) Facilities Co-Chairperson  
Catherine Buzanski (Medaille) Entertainment Chairperson  
Laura Helmich (PNC) Vendor Chairperson  
Vince Scalise (ASA) Publicity Chairperson  
Kathy Michalski (Niagara CCC) Registration Chairperson  
Matt Metz (D'Youville) Technology Chairperson  
Jeanne Mossios (Medaille) Scholarship Table

### **Goals and Objectives:**

To put on an informative and entertaining conference which allows attendees to learn about programs and process, professional development, and ability to network with colleagues.

### **Summary of Activities:**

Had our first conference committee meeting virtually in August. Had our first walk through event site in April. Program Committee met after the Region 1 meeting on September 25, 2014. Basic budget has been created. Individual region members have begun to sign up as volunteers on various committees. Theme and logo have been designed and save the date magnet will be distributed at this year's conference in Lake Placid. Theme is: "Power of the Past, Force for the Future" a scene of Niagara Falls is the logo.

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

In-person conference committee meeting is scheduled for November 3, 2014 at 4:30pm. Meeting with event site (Buffalo Convention Center) coordinator scheduled for October 7<sup>th</sup> at 10:00am, also trying to schedule meeting with hotel coordinator from Hyatt Regency. Additional meetings will be planned as we move along the process and get closer to the event date.

### **Recommendations:**

None at this time.

**Submitted by:** Laura Worley, 2015 NYFSAAA Conference Committee Chairperson

**Date:** 9.30.2014



## Development Committee

### Committee Members:

Tami Gilbeaux, Chair

### Goals and Objectives (Long Range):

1. The reestablished Development Committee should explore new revenue sources for NYSFAAA by examining the current model of financial support and consider changes within or new models that may be appropriate.
2. The Development Committee should explore funding opportunities through grant writing that fulfills the mission of NYSFAAA, namely; training its members, outreach for students and others, better communication techniques and advocacy for student aid programs.
3. The Professional Development Committee should offer training opportunities in grant identification and grant writing to interested NYSFAAA members.
4. The Development Committee should assist conference committees in finding non-lending vendors to exhibit at our annual conference.
5. The Development Committee should create a list of foundations that share NYSFAAA goals and submit applications to these foundations to request sponsorship.
6. The Development Committee should explore gaining financial support

### Summary of Activities:

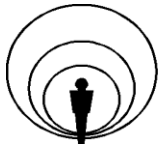
Committee was re-established on 9.24.14 Upcoming Meetings and Events:

### Upcoming Meetings and Events:

### Recommendations:

**Submitted by:** Tami Gilbeaux

**Date:** 9.29.14



## Elections Committee

### **Committee Members:**

Chair – Kerrie L. Cooper – President Elect

Region 1 – Lisa Tremem

Region 2 – BJ Revill

Region 3 – Annette Broski

Region 4 – Kristina Delbridge

Region 5 – Dan Robinson

Region 6 – Lucy Villaquiran

Region 7 – Jim Newell

Region 8 – Carolyn Corcoran

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

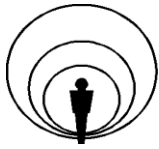
The goals and objectives of the Elections Committee is to coordinate the annual statewide election process for officers and regional councilpersons of the Executive Council within the parameters of the NYSFAAA Constitution and Policies & Procedures.

### **Summary of Activities:**

- Call for Nominations for the offices of 1<sup>st</sup> VP, 2<sup>nd</sup> VP and Secretary went out by email on 3/19/14.
- Final call for nominations sent day before deadline
- Nominees were verified for eligibility and agreement to run for office.
- Slate of Nominees sent to website liaison to build ballot.
- Election Notice sent 4/29/14
- Two reminder notices sent by email. All notices also posted on Empire Chat.
- Results verified after deadline to vote and all candidates (successful and not successful are notified by phone if possible).
- Results posted to listserv and blog on 5/13/14
- Election results – 1<sup>st</sup> VP – Jan Scheutzow
- 2<sup>nd</sup> VP – Howard Leslie
- Secretary – Kathy Flaherty

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

Spring 2015 election process to include Regional Councilpersons, President-Elect and Treasurer-Elect.



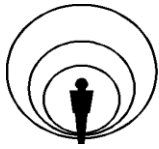
**Recommendations:**

- While election process schedule has some flexibility it is recommended that the process be complete in time to invite successful candidates to the Executive Council June retreat.
- It is recommended to keep the ballot open no more than two weeks. That is the optimal timeframe for members to keep the election in mind. Reminders do help but we feel a longer timeframe does not increase voter turnout.

**Submitted by:** Kerrie L Cooper, President Elect

**Date:** 10.15.14





## Finance and Budget Committee

### **Committee Members:**

Patricia Johnson, Treasurer

Robert Zasso, Chair

Region 1- Laura Worley

Region 2- Nora Bell

Region 3- Danielle Griggs

Region 4- Randi Moore

Region 5- Perry Brown

Region 6- Lucy Villaquiran

Region 7- Amy Thompson

Region 8- Susan Godreau

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

Our major goal for the future is to advise the Executive Council on organizational expenses in regards to creating a balanced budget.

### **Summary of Activities:**

The Budget and Finance committee was tasked with preparing a draft 2014-2015 budget for presentation to executive council at the summer 2014 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 2014-2015 budget was accepted by Executive Council on June 12, 2014. The budget supports the current activities of the organization, and planned initiatives for the immediate future.

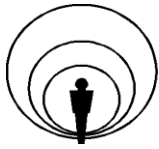
### **Upcoming Meetings and Events:**

None currently scheduled

### **Recommendations:**

**Submitted by:** Robert Zasso

**Date:** 10.13.2014



## Governance and Ethics Committee

### Committee Members:

Kerrie L. Cooper – President Elect – Chair  
Heather McDonnell  
Curt Gaume  
More requests in progress

### Goals and Objectives (Long Range):

#### Summary of Activities:

- The approved NYSFAAA Alcohol Policy was incorporated into the Policies and Procedures Manual. The Policies and Procedures Manual was updated to reflect other changes needed to be in compliance with this policy.
- Implementation of the NYSFAAA Long Range Plan took effect. Committees were given a template for the 2013-14 Annual Reports to reflect important elements of the plan. This will enable the Governance Committee to review the annual reports more easily as part of its annual review of the Long Range Plan. The timeframe for the review is being modified for the Operational Calendar as we go through this first round of review.

### Upcoming Meetings and Events:

Annual reports will be reviewed by the Governance Committee once available.

### Recommendations:

This first year through the LRP has been a year of planning. We hope to use this experience to create a standard procedure for evaluation.

**Submitted by:** Kerri L Cooper, President Elect

**Date:** 10.15.2014



## Membership Committee

### **Committee Members:**

Adrienne King, Chair

Regional Membership representatives:

Region 1 – Leigh Bove

Region 2 – Margaret Christian

Region 3 – Darrin Rooker

Region 4 – Rochelle Filler

Region 5 – James Filippelli

Region 6 – Melanie William-Bethea

Region 7 – Michelle Kaminski

Region 8 - Pat Farmer

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

1. Will continue to send reminders to renew membership & pay invoices.
2. Regional Representatives will reach out to the Affiliate members within their perspective regions to ascertain why some of them haven't renewed their membership.

### **Summary of Activities:**

We try to schedule our meetings before each NYSFAAA Executive Council meeting. We recently met and discussed the proposed change in membership definitions. We have also discussed when during the year, we should contact membership via reminder emails about paying their invoices and renewing their membership.

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

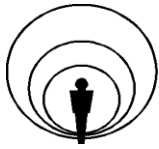
Next meeting will be either Thursday or Friday, week of the 10<sup>th</sup> or 17<sup>th</sup> of October.

### **Recommendations:**

We would like to increase membership and participation of current membership in Regional meetings. Trying to figure out new ways to engage our membership b/c many cannot physically attend meetings. The trend seems to be only being able to virtually attend Training workshops.

**Submitted by:** Adrienne King, Chair

**Date:** 9.30.14



## Mentoring Committee

### **Committee Members:**

Janet McGrath – Co-Chair

Dawn Langdon - Co-Chair

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

1. Utilize a variety of communication methods, including social media, to provide current information from NYSFAAA, EASFAA, and NASFAA to mentees/mentors to encourage attendance at events.
2. Create list serve of financial aid directors, associate directors and assistant directors and communicate with them regularly to seek assistance in recruiting new members as well as inform their staff of events.
3. Encourage/train new members to get involved in financial aid information presentations geared toward prospective students at targeted programs/financial aid nights.

### **Summary of Activities:**

Jim Vallee stepped down from the Mentoring Committee in October of 2013 and Dawn Langdon joined the committee as co-chair as of April 2014. Twenty-one Mentors from all eight regions maintained contact with fifty-two mentees regarding upcoming training, NYSFAAA meetings and events. These mentees completed contact cards at Novice and gave permission to be contacted by a Regional member. The cards/names were distributed to the volunteer mentors in each specific region. These individuals and current members were encouraged to stay involved in the profession and become leaders in NYSFAAA at the local or state level. Two novice attendees were chosen to attend the 2013 NYSFAAA Annual Conference in Long Island. The recipients were thrilled to have this award and thoroughly enjoyed their conference experience. This will be continued for the next year. Questions on mentoring committee were added to NYSFAAA's Annual Survey.

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

Meeting with Novice attendees at conference.

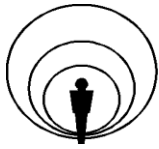
Conference call with mentors on a quarterly basis to discuss upcoming events and ideas.

### **Recommendations:**

Mentoring Committee to be continued.

**Submitted by:** Janet McGrath, Co-Chair, Mentoring Committee  
Dawn Langdon, Co-Chair, Mentoring Committee

**Date:** 9.30.14



## Nominations and Elections Committee

### Committee Members:

Kerrie L Cooper, Chair, President Elect

Regional Membership representatives:

Region 1 – Lisa Tremem

Region 2 – BJ Revill

Region 3 – Annette Broski

Region 4 – Kristina Delbridge

Region 5 – Dan Robinson

Region 6 – Lucy Villaquiran

Region 7 – Jim Newell

Region 8 – Carolyn Corcoran

### Goals and Objectives (Long Range):

The goals and objectives of the Elections Committee is to coordinate the annual statewide election process for officers and regional councilpersons of the Executive Council within the parameters of the NYSFAAA Constitution and Policies and Procedures.

### Summary of Activities:

- Call for Nominations for the offices of 1<sup>st</sup> VP, 2<sup>nd</sup> VP and Secretary emailed on 3/19/14.
- Final call for nominations sent day before deadline
- Nominees were verified for eligibility and agreement to run for office.
- Slate of Nominees sent to website liaison to build ballot.
- Election Notice sent 4/29/14
- Two reminder notices sent by email. All notices also posted on Empire Chat.
- Results verified after deadline to vote and all candidates (successful and not successful are notified by phone if possible).
- Results posted to listserv and blog on 5.13.14
- Election results – 1<sup>st</sup> VP – Jan Scheutzow  
2<sup>nd</sup> VP – Howard Leslie  
Secretary – Kathy Flaherty

### Upcoming Meetings and Events:

Spring 2015 election process to include Regional Councilpersons, President-Elect and Treasurer-Elect.

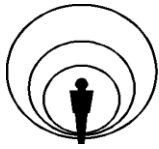
### Recommendations:

While election process schedule has some flexibility it is recommended that the process be complete in time to invite successful candidates to the Executive Council June retreat.

It is recommended to keep the ballot open no more than two weeks. That is the optimal timeframe for members to keep the election in mind. Reminders do help but we feel a longer timeframe does not increase voter turnout.

**Submitted by:** Kerrie L. Cooper, President-Elect

**Date:** 9.30.14



## Novice Training

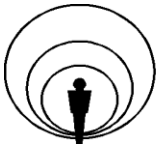
### **Committee Members:**

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  
Jacque Pascariello, SUNY Stonybrook, Large Group Leader  
Andy Mantell, Mercy College, Athletic Director  
Dan Hunter, Director Emeritus, Buffalo State College, Small Group Leader  
Curt Gaume, Canisius College, Small Group Leader  
Rob Zasso, Dutchess Community College, Small Group Leader  
Renee Pelletier, Stony Brook University, Small Group Leader  
Adrienne King, Bank Street College, Small Group Leader  
Perry Brown, The College of Westchester, 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  
Melanie Williams-Bethea, Teachers College, Small Group Leader  
Angela Van Dekker, Fordham, Breakout Session Leader  
Anita Gambke, Fordham, Breakout Session Leader

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

#### **Summary of Activities:**

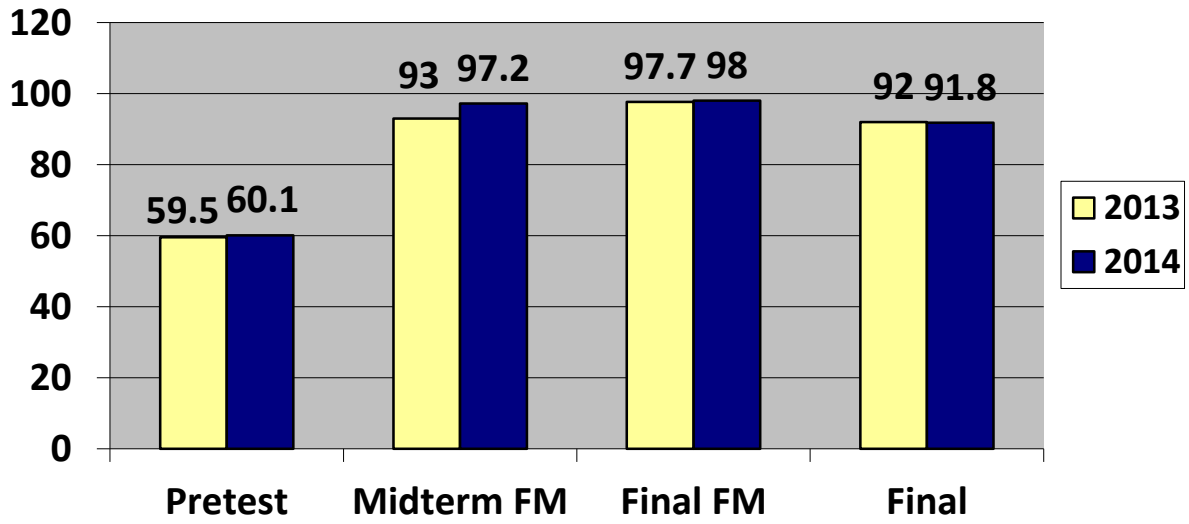
The 44th Novice Training was held, for the second time, at Mercy College, Dobbs Ferry Campus from May 31st through June 6, 2014. We welcomed 91 new NYSFAAA members this summer and twenty-one (21) staff assisted. The staff worked diligently again this year revising the *Novice Training Manual*, as there were many changes. Novice is truly a group effort and would not be what it is without each and every Novice Member.



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**

<b>Private College</b>	<b>62</b>
Public College	16
Proprietary College	7
Other/Non Specified	4
Grad/Professional	0
Lenders	2
<b>Total</b>	<b>91</b>

**Regional Breakdown**

Region 1	2
Region 2	7
Region 3	12
Region 4	3
Region 5	32
Region 6	26
Region 7	5
Region 8	0
Non Affiliated (Reg. 9)	4
<b>Total</b>	<b>91</b>

All in all, Novice 2014 was a huge success however we did have some recommendations to shorten the training from Sunday to Thursday and serve less chicken.



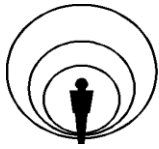
*New York State Financial Aid  
Administrators Association*

**Upcoming Meetings and Events:**

We will continue to research and compare prices to help reduce our expenses and training manual updates will soon begin for Novice 2015.

**Recommendations:**





**Submitted by:** Lisa Simpson and Lisa Papke

**Date:** 10.15.2014

## Scholarship Committee

### **Committee Members:**

Debra Evans, Chair

Regional Membership representatives:

Region 1 – Roseanne Johnson

Region 2 – Scott Atkinson

Region 3 – Jackie Darquea

Region 4 – Lisa Dooley

Region 5 – Janice Hilbrink

Region 6 – Tania Degen

Region 7 – Crystal Krudis

Region 8 – Stacey Hawkins

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

1. We continue to solicit donations annually and to award 5 scholarships of \$1,500 (Public 2-year, Private 2-year, Public 4-year, Private 4-year, Graduate).
2. We plan to continue the scholarship raffle program at the annual conference since it continues to be popular and has been successful in the past. We will consider any new ideas to assist in our fund-raising efforts.
3. We will continue to recruit additional members in each region and will ask the regional chairs to actively assist in that recruitment.

### **Summary of Activities:**

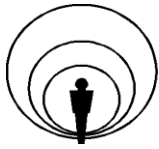
During the past year we received \$2,165 in direct donations and raised \$1,500 from the conference raffle.

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

Our next planned conference will be in October to select the recipients of the 2014-2015 scholarships

### **Recommendations:**

We would like to hear from anyone with an idea to increase our fund-raising efforts.



**Submitted by:** Debra Evans

**Date:** 10.2.14

## School Outreach and Early Awareness Committee

### **Committee Members:**

Rachel Barker  
LaSonya Griggs  
Eugene Rogers

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

1. Provide more professional development opportunities for affiliate members
2. Network with communities and their official to promote FAFSA filing opportunities
3. Increase the number of self-sufficient College Goal New York sites

### **Summary of Activities:**

#### Early Awareness

Conducted a couple of workshops in the Long Island area to promote avenues parents can use to save for college while their children are still young.

#### College Goal New York

Sponsored 27 College Goal New York sites. Over 300 volunteers helped 1,428 students and their parents complete the FAFSA, TAP and in some cases, the CSS Profile Form. Many of these volunteers worked at more than one CGNY event.

New York was recognized by USA Funds as the only College Goal Sunday program from the 39 participating states with the highest ratio, 97%, of students who successfully completed their FAFSA. Additionally, according to survey respondents, 97% of attendees were from our target population of low income, first generation, and underrepresented students. The success of these two components of our program are due primarily to marketing material that outlines documents families should take to CGNY and the partnerships site coordinators have with high school personnel. The majority of our partner high schools have predominately student populations that are over 50% free or reduced school lunches and located in economically challenged areas.

#### Guidance Counselor Workshops

NYSHESC and NYSFAAA hosted nine guidance counselor workshops. NYSHESC created the agenda and paid venue fees for room rent and catering using College Access Challenge Grant funds. The workshops were well attended and we received positive feedback from the guidance counselor surveys.

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

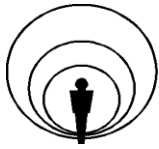
As a committee we are trying to meet via phone at least once a month.



**Recommendations:**

Since we now have affiliate membership that includes high school guidance counselors and college access personnel, we would like NYSFAAA to identify services that we can provide to these members as regards training opportunities, professional development and educating their students on the admissions and financial aid application processes. Such opportunities should be considered on a regional and state level.

**Submitted by:** LaSonya Griggs



Date: 10.17.2014

## NYS Government Relations Committee

### Committee Members:

Susan Mead, Chairperson

Katie Kuhl

Julietta Schiffino

Jerome St. Croix

Jason Boyd

Lydia Carter

Perry Brown

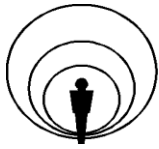
Daniel Sharon

### Goals and Objectives (Long Range):

1. Moving forward on TAP Reform, specifically with initiatives that reflect the membership beliefs that resulted in the development of the TAP Reform White Paper. The TAP Reform White Paper speaks directly to the results of the TAP Reform Survey which was conducted during the 2011-2012 academic year. The initiatives that the committee and NYSFAAA should focus on include, but are not limited to the following:

While there were some legislative changes to TAP, specifically in relation to the independent schedules for orphans or wards of the court and a small increase in maximum TAP funding, many of the procedural and processing changes that were part of the TAP Coalition's Platform were not addressed. It is hoped that we can continue to move forward and build on the momentum of TAP reform that is being addressed across the state from many organizations, while using our White Paper as a foundation. Continued grass roots efforts are needed to keep TAP reform alive in the various NYSFAAA regions.

2. We need to focus attention on:
  - a) Simplifying the TAP schedules
  - b) Equating the federal definition of an independent student to that of a dependent student and eliminating the fact that a student can be considered dependent on their parents until the age of 35 if they live in a home that is owned, rented or leased by their parents.
  - c) Allow for professional judgment to be used by financial aid administrators to assist students with extenuating circumstances, similar to the ability to do so under federal law.
  - d) Develop a process of oversight for continued effectiveness of the administration of the TAP program. This should include consistent yearly training of those responsible for TAP certification. This should also align with the identification of weak practices that can be found in recent TAP audits conducted through the NYS Comptroller's Office.



**Summary of Activities:**

Many meetings with the TAP Coalition, formed by NYPIRG to develop the TAP Reform Platform, including items from the NYSFAAA White Paper

Meeting with CICU in Albany in December to prepare for Student Aid Advocacy Day

Met with Ian Rosenblum – Deputy Secretary for Education and Economic Opportunity for the Cuomo Administration in NYC to address TAP Reform

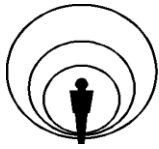
Participated in Student Aid Advocacy Day where members of NYSFSAAA met with legislators to discuss TAP Reform.

Testimony was given at budget hearings of the joint committees for House Ways and Means and the Higher Education Committees regarding the need for TAP Reform.

**Upcoming Meetings and Events:**

**Recommendations:**

Recruit committed members to the committee who will attend regional meetings to push forward the grass roots initiatives that are necessary to further TAP Reform. Include local legislators or aides from their offices to regional meetings to strengthen NYSFAAA's position in relation to TAP Reform.



**Submitted by:** Susan L. Mead

**Date:** 9.29.14

## Statewide Training Committee

### **Committee Members:**

Howard Leslie

Kristina Delbridge

Perry Brown

Anne DelPlato

Angela VanDekker

Wendy Rizzo

Support from TICC member Lea Nuwer is greatly appreciated.

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

To continue to provide relevant and timely training to our members via distance. This training should work in conjunction with Regional Activities and Meetings to add to the member's overall experience. Engagement at the regional level via webinar intertwined with in-person activities will be further explored as a way to heighten the member's involvement.

### **Summary of Activities:**

Webinars provided via distance to our members. Committee members assist with the development of possible webinar topics, identifying potential trainers and panelists, marketing, testing the session, providing supplemental materials prior to the session, the session itself, making the session (if recorded) and supplemental materials available on the NYSFAAA training site, developing the survey, providing the survey to the members and compiling survey results.

Sessions held:

- September 19, 2013: Default Prevention Webinar
- October 31, 2013: Moving Ahead for Progress in the 21<sup>st</sup> Century
- November 7, 2013: R2T4 Compliance and Collaboration
- January 23, 2014: Verification 2014-2015
- February 5, 2014: It's My Draft CDR! OMG! What do I do now?
- February 21, 2014: How FAAs Award and Disburse Title IV Funds using Modules and How Types of Academic Terms and Non-standard Terms Affect TIV
- March 5, 2014: Jim Briggs: Verification and Taxes- a focus on all related new 2014-15 regulations and DOMA
- March 20, 2014: Proposed New SFA Audit Guide and Top Ten Items for a Smooth Compliance Audit
- April 22, 2014: Gainful Employment- The Second Time Around
- June 26, 2014: How to Avoid TAP Audit Findings



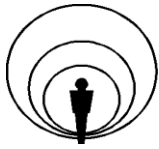
### **Upcoming Meetings and Events:**

Note that the dates and sessions noted below have been confirmed. Additional sessions will be offered and as sessions and dates are confirmed information will be made available on our website.

- (completed) September 18, 2014:
- October 16, 2014: Washington Update- Reauthorization and More
- November 20, 2014: Gainful Employment 2.0
- TBD: Verification session
- February 12, 2015: NYSFAAA statewide training day. This will be a webinar which will be provided to specific regional sites and have in-house facilitator/trainer
- February 26, 2015: Jim Briggs Tax Detective

### **Recommendations:**

We would like to continue to explore ways of creating an environment that fosters participation of members of regional meetings.



**Submitted by:** Howard Leslie and Kristina Delbridge, Co-Chairs

**Date:** 09.24.2014

## Technology, Innovation, and Communication Committee

### **Committee Members:**

Lea Nuwer (Buffalo State)  
Kathy Flaherty (Oswego)  
Howard Leslie (Berkeley College)  
Amanda Prescott (Potsdam)  
Jannatul Ferdous (Columbia University Teacher's College)  
Robert Shaw (Pratt Institute)  
Jason Boyd (Syracuse University)  
Chris Oakley (Rensselaer)  
Ideta Daniel (Columbia University)  
Tim O'Donnell (CMD Outsourcing Solutions)  
Julie Rehder (ELM Resources)

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

1. We will continue to recruit technologically savvy members representing all regions of the state.
2. We will focus on communication via social media and the use of our Empire Chat blog by keeping a current stream of postings, encouraging participation, and relaying helpful instruction on their use.
3. We will continue to perform outreach to offer support to all interested committees. We will continue to work closely with the Professional Development Committee in promoting its webinars, providing backup, and preparing surveys.
4. We will investigate any new technologies that may be helpful to the membership.
5. We will continue support of the NYSFAAA website.

### **Summary of Activities:**

During the past year we have met 3 times and had numerous off-line discussions regarding go-forward plans.

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

November 2014

### **Recommendations:**

We would like to have a member from each region represented on this committee.

Upon the installation of the new President, I would like to be assigned a Co-Chair.





**Submitted by:** L Nuwer

**Date:** 9.30.2014

## Treasurer's Report

### Audits

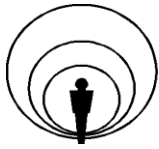
We continue to work with Arcara & Borczynski LLP to complete our audits. The 2011-12 audit has been completed, 2012-13 audit is under final review and 2013-14 is scheduled to begin mid-November. Having our audits up to date will allow us to monitor our accounts much more effectively in the future.

Our accounts are all in good standing and we have had no significant audit exceptions. Recommendations have been made to standardize some of our procedures which have been and will continue to be reviewed for feasibility. In conjunction with the audit recommendations we have been reviewing and enhancing our policies and procedures manual to make the transition to each new treasurer easier.

### Investments

Our investment accounts have been doing well and we are financially sound with our account balances for future activities. We met with our financial advisor from Morgan Stanley to ensure we continue on the right track with our investments and continue to grow.

I would like to take this opportunity to welcome Kerry Lubold as our new treasurer effective with the October conference. I will be working closely with Kerry as we transition fully in the next few months. It has truly been a pleasure serving as the treasurer of NYSFAAA.



**Submitted by:** Pat Johnson, NYSFAAA Treasurer

**Date:** 10.17.2014

## Regional Reports

### Region 1 Report

## NYSFAAA Executive Council Meeting

October 20, 2014

### 1 MEETINGS SINCE LAST EXEC COUNCIL MEETING

September 25<sup>th</sup> at Hilbert College

Attendees - 31

Topics and Training details:

- Round Table Discussion of various topics including; FISAP, One Stop Shop, and Membership Designations.

### 2 Other Training events that Region was involved in : None

### 3 Treasury update:

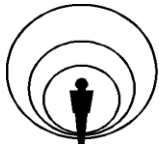
Balance as of 9/25/14 is \$7548.28, with no recent activity.

### 4 Committee Reports:

- Conference 2015 (see below)
- Guidance Counselor Workshops: Buffalo - Co-chaired by Kathy Michalski & Curt Guame, St. Bonaventure chaired by Troy Martin. Topics will include; State & Federal Updates, Classroom Financial Aid Presentations for Counselors to give parents, HEOP/EOP, Special Conditions, and an Ask the Expert Panel Discussion.
- Membership (Leigh Bove): 1282 Active Members in NYS, 148 Active Members in Region 1
- Executive Counsel Report: Changes to definitions of Associate & Affiliate Memberships, Incorporation of the updated Strategic Long Range Plan in Committee Planning & Reporting, next meeting October 20<sup>th</sup> at 2014 Conference.

### 5 Conference news (2015):

The conference theme has been chosen: "Power of the Past, Force of the Future" with a picture of Niagara Falls. "Remember the Date" magnets will be distributed at the end of this year's conference. The Program Committee met after Region 1 meeting on 9/25/14. Laura Worley and Sean Hudson will



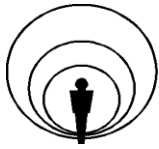
meet with representatives at The Hyatt Regency and Buffalo Niagara Convention Center on October 7<sup>th</sup> to clarify the contracts to assist in budgeting. The Conference Committee is scheduled to meet on November 3<sup>rd</sup> to discuss progress. Laura has asked the region for ideas for a keynote speaker.

## 6 Upcoming meetings and events:

- Next Regional Meeting tentatively scheduled for November 13, 2014, location TBD, Training Topic will be Reauthorization of Higher Education Act presented by Curt Gaume
- Guidance Counselor Workshops
  - November 19<sup>th</sup> at Classics V in Amherst, NY
  - November 20<sup>th</sup> at St. Bonaventure University
- Christmas Party and December Meeting tentatively scheduled for December 18<sup>th</sup>, location TBD. Laura Worley and Sister Diane (Villa Maria College) will co-chair the party. Haven House Shelter for victims of domestic violence was chosen as this year's charity.
- Working on a location for the state wide training on February 12, 2015 – ERIE 1 BOCES has space available but wants to charge us \$30/hr. for room rental. Additional discussion will be needed.

## 7 Regional comments:

- Jeanne Mossios has agreed to take over as Region 1 Chair from Rachel Barker who had to resign due to work commitments. Jeanne led our meeting on 9/25.
- Villa Maria College and Hilbert College have added staff members.
- Mary Koehneke has been named Interim Director of Student Financial Aid at Canisius College.
- Dan Hunter would like additional clarification on what Lifetime Members in NYSFAAA can do, i.e. vote, hold positions, etc.?
- Warren Hoffmann was identified as our NYSFAAA Regional Historian.



## Region 2 Report

# NYSFAAA Executive Council Meeting

October 20, 2014

### 1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

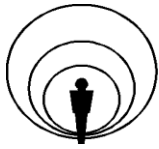
Date and Location: September 26, 2014 at Alfred State

Attendees -18

Chris Vernam – Alfred State, Laura Karns – Alfred State, Robin Harrington – Alfred State, Mark Schwartz – MCC, BJ Revill – U of R SMD, Jane Gilliland – Alfred State, Karen Blankenburg – Access Group, Megan Kennerknecht – Geneseo, Laura Helmich – PNC, Vince Scalise – SALT/American Student Assistance, Melissa Casselman - Nazareth, Sandy Killeen – Nazareth, Joe Schmitthenner – Nazareth, Scott Atkinson – Brockport, Nora Bell – Brockport, Susan Romano – FLCC, Lee Bove – Great Lakes, Laura Formella – Nazareth College

Topics and Training details:

- Laura Formella discussed Secretary Report: Minutes of our last meeting held at Genesee Community College were previously emailed to all members of our region and were approved.
- I gave an Executive Council representative update from our June meeting that addressed the future of Perkins asking region 2 members to become involved at their schools to spread awareness. The NYSFAAA Conference will have a “Best Practices” poster contest and I reminded members to bring a poster from their schools displaying one of their “Best Practices” topics they employ. I also gave information regarding the October 1st, increase to the Direct Loan origination fees and the TEACH Grant reduction.
- Jan Scheutzow, Region 2 Chair, updated the members that effective in October, Region 2’s Co-chairs will be BJ Revill and Chris Vernam. They will be taking over for Jan in the Region 2 Chair position. The Region 2 secretary will be Megan Kennerknecht taking over for Laura Formella. Jan thanked them for volunteering to take over those positions. Melissa Casselman, Nora Bell, and Margaret Christian will continue in their roles as Executive Council Rep, Treasurer, and Membership Rep respectively.
- We discussed the future Region 2 meeting schedule. On November 14<sup>th</sup>, we will meet at Geneseo; December 12<sup>th</sup> at FLCC (holiday party); early – mid February at



Nazareth College, March 20 at Roberts Wesleyan, and April 17 at Genesee Community College. Remember that the Guidance Counselors' Workshop will be held at Brockport on November 21<sup>st</sup>. We need at least 70 -80 donated items for the workshop. Scott Atkinson will house those donations. You may bring your donations to our next meeting.

- Megan Kennerknecht volunteered to make up our region's basket for the NYSFAAA conference. It will have an "Apple" theme.
- Cindy Kohlman has accepted the position of VP of Financial Aid Operations at Inceptia. We all wish her success.

Training:

- Maria Livolsi (COHEAO President) and Mark Hill (SUNYFAP President) spoke via conference call and provided a Power Point about support for reauthorization of the Perkins Loan Program. We need to act now to save this program.

**2 Other Training events that Region was involved in : NONE**

**3 Treasury update:**

We currently have \$2,774.75 in our account (with nothing outstanding). This includes our June revenue sharing check in the amount of \$565.

**4 Committee Reports :**

Membership Report given by Jan Scheutzow:

We have six Novice members who were invited to this meeting. Of the six, Laura Karns-Alfred State and Karen Blankenburg-Access Group, were in attendance at this meeting and were welcomed. NYSFAAA Renewal membership letters for 2014-2015 were sent to affiliate members; there is no fee assigned to them. Jan Scheutzow reviewed our Region's accomplishments for 2013-2014. The NYSFAAA goal was 1,549 members and the final total is 1,369. This is in line with our three-year average. There has been a decrease in membership across all regions. The goal for 2014-2015 is 1,380. As of 9/26/2014, there are 530 paid memberships (97 of which are from region 2). As people register for the conference in October, the membership total will rise. The NYSFAAA goal from membership dues was \$74,000 and we surpassed that goal by \$3,000. A membership survey will be released soon. Also, the brochure will be updated with an edited definition of affiliate and associate membership.

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

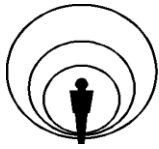
None.

**6 Upcoming meetings and events**

We discussed the future Region 2 meeting schedule. On November 14<sup>th</sup>, we will meet at Genesee; December 12<sup>th</sup> at FLCC (holiday party); early – mid February at Nazareth College, March 20<sup>th</sup> at Roberts Wesleyan, and April 17<sup>th</sup> at Genesee Community College.

**7 Regional comments/Recommendations (If you region has a pressing issues that needs to be brought to the attention of Council) None.**

Respectfully Submitted,



Melissa Casselman, Nazareth College

Region 2 Exec Council Rep

## Region 3 Report

# NYSFAAA Executive Council Meeting

October 10, 2014

## 1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: September 26, 2014, SUNY Oswego – Fallbrook Lodge

Attendees - 22

Topics and Training details:

- Two roundtable topics were discussed. The first topic was the NYSFAAA constitutional amendment changing the definition of Affiliate membership. Members in attendance were generally in favor. Some members still felt that further clarification may be in order when it comes to individuals who work in high school college access programs and paid financial consultants.
- The second topic was the possible end to the Perkins loan program. Most discussion on how to make legislators aware of the impact this will have on financially needy students.

2 **Treasury update:** \$5462.49 bank balance as of September 26<sup>th</sup>.

## 3 **Committee Reports**

## 4 **Guidance Counselor Workshop**

Dates have been set. Binghamton, NY will be Thursday, November 13<sup>th</sup>, site yet to be determined. Syracuse will be Friday, November 14<sup>th</sup> at the Embassy suites in East Syracuse. The Syracuse site will also have a novice training session for new guidance counselors.

## 5 **Upcoming meetings and events**

Future Regional Meeting dates:

November 20<sup>th</sup>, Site: TBD Topic: Statewide training Gainful Employment webinar

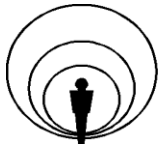
December 12<sup>th</sup>, Site: Justin's Grill (Syracuse) Topic: Holiday party meeting

February 12<sup>th</sup>, Site: Le Moyne College Topic: Statewide training Needs Analysis webinar

March 13<sup>th</sup>, Site: TC3 Topic: TBD

May 8<sup>th</sup>, Site CCC Topic: TBD

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



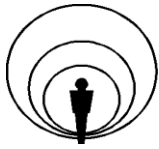
Explore the possibility of adding a “NYSFAAA Service” section to the membership application. This would be a record of all the committees, offices, and other services the member has volunteered to perform in support of NYSFAAA over their career.

## Region 4 Report

### NYSFAAA Executive Council Meeting

October 3, 2014

1. **MEETINGS SINCE LAST EXEC COUNCIL MEETING:**
  - a. We held 2 meetings during the 2013-2014 year.
    - i. October 29 at Albany Law School- 22 in attendance
    - ii. December 12 at RPI - 21 in attendance
  - b. Our last 2 meetings scheduled were later cancelled due to low turnout.
2. **Other Training events that Region was involved in :**
  - a. Intermediate Workshop: 4 Region IV people assisted.
  - b. College Goal Sunday events: College Goal NY event being held at Albany High on 2/6, 2/13 and 2/27
3. **Treasury update:**  
\$ 8224.22
4. **Committee Reports**
  - a. Membership: 99 members. This is down from June 2014 – at that time we had 133 members. We will be working as a region to determine why membership has decreased.
5. **Conference news**
  - a. None-our Region IV is not hosting the 2015 conference and therefore no information needs to be presented.
6. **Upcoming meetings and events**
  - a. November 18<sup>th</sup> from 10:30-12 we will host our next meeting. This is a Tuesday and we are hoping that this will allow more members to turn out. Agenda items are still being determined but we will have a HESC update given by Lisa Simpson and Perkins update given by Maria Livolsi.
  - b. February 12, 2015 will be Statewide Training Day and we are identifying possible trainers and locations at this time.



## **7 Regional Comments/Recommendations:**

- a. Mary Louis stepped down as our Regional Chair this summer. Nicole Hoyt from SUNY Empire State College and Patrick Ziegler from Wells Fargo Education Financial Services are now serving as Co-Chairs.
- b. Current membership and the fact that our region's overall membership has decreased is concerning. We will reach out to members who have not signed back up and will plan to survey our region to determine why they are not attending: ex: topic, location, and other training opportunities interfering?
- c. Strategic Long Range Plan Goals:
  - i. **ADVOCACY:** We would like to increase advocacy efforts of Region IV members due to our location. Over the next year we would like to incorporate guests from state legislature, SED, OSC and HESC into our meetings in order to strengthen our relationships with those agencies.
  - ii. **LEADERSHIP and DEVELOPMENT:** Over the next year we will encourage other members to attend Executive Council meetings so that they can have an opportunity to learn more about NYSFAAA. This will provide a targeted mentoring opportunity for those who may be interested in becoming future leaders within NYSFAAA.





## Region 5 Report

### NYSFAAA Executive Council Meeting

September 30, 2014

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

Date and Location: Feb. 21, 2014, Marist College

Attendees - 19

Topics and Training details:

- TAP Reform, Income Driven Repayment Plans

#### 2 Other Training events that Region was involved in : Tri-Regional

#### 3 Treasury update:

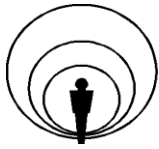
\$10,001.07. Note that all the funds Region 5 was holding in escrow for Tri-Regional have been spent.

#### 4 Upcoming meetings and events

Meeting planned for Tuesday evening, October 21, 2014 at Lake Placid. Agenda: discussion of plans for the year. To be followed by a Regional dinner and social evening at a local restaurant.

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

Our main concern is numbers. We need to get more members involved in regional events.



\*An updated report will be sent with the current Treasury balance.

## Region 6 Report

### NYSFAAA Executive Council Meeting

October 2, 2014

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

Date and Location: September 30, 2013 – Region 6 Fall kick off meeting was held at Mercy College.

Attendees - 21

Topics and Training details:

Regional 6 Updates/Announcements:

- Empire Chat
- State Government Relations Committee
- NYSFAAA Intermediate Training
- Gift Basket
- Membership Update
- Treasury Update

HESC Update by Michael Turner

Federal Update by Nautochia Webb

Conflicting Information

PELL Lifetime Eligibility Used (LEU)

Date and Location: December 13, 2013 – Region 6 Holiday Meeting was held at Berkeley College.

Attendees - 25

Topics and Training details:

Region 6 Updates/Announcements:

- Membership Update
- Treasury Update

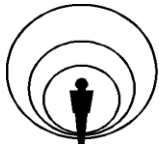
Veteran's Benefits

Federal Loan Servicers Panel Discussion representatives from FedLoan, PHEAA, Great Lakes, Nelnet and Sallie Mae.

Date and Location: February 20, 2014 - Region 6 Winter Meeting was held at Julliard School.

Attendees - 27

Topics and Training details:



- FAFSA Update by Michael Turner  
Managing and Understanding Your Institution's Cohort Default Rate by Clem La Pietra  
Region 6 Updates/Announcements:
- Membership Update
  - Treasury Update

Date and Location: April 11, 2014 Tri-Regional Meeting (Regions 5, 6 & 7) at Monroe College.

Attendees - 50

- Topics and Training details:
- Loan Repayment
  - Social Media in Student Services
  - Implementation of the 150% Rule in 2014-15
  - HESC Update by Lisa Simpson

Date and Location: May 9, 2014 Support Staff Workshop at Teachers College.

Attendees - 60

- Topics and Training details:
- FAFSA/TAP Updates
  - FERPA
  - How Different Offices Work Together
  - Customer Service

Date and Location: June 20, 2014 - Region 6 Summer Meeting.

Attendees - 68

- Topics and Training details:
- Testing your Knowledge
  - Region 6 Updates
    - Membership/Involvement in the Region
    - Treasury
    - Future Events

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

Two High School Counselor Workshops – October 25<sup>th</sup> held at FIT and November 22<sup>nd</sup> held at Marymount Manhattan College

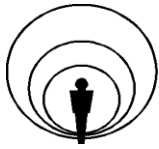
**3 Treasury update:**

**4 Committee Reports:**

**5 Conference news:**

**6 Upcoming meetings and events** – Region 6 Fall Kick off meeting on October 10, 2014. The reps are planning for future events.

**7 Regional comments/Recommendations**



## Region 7 Report

# NYSFAAA Executive Council Meeting

October 20, 2014

Gene Rogers- Region 7 EC rep  
Jeanne McCarthy/Christine DeSousa- Co-Chairs  
Amy Thompson- Treasury

### 1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Dec 4<sup>th</sup> 2013- location- Jericho NY (Holiday meeting/party)

Attendees- 26

Presentations included a report from the Intermediate workshop, an EC report and we had the pleasure of having Mr. Scott Buchanan from Sallie Mae speak on how aid topics are discussed in DC- government relations type information.

March 21<sup>st</sup>- NYCOM- NYIT

Attendees- 31

Presentations included a workshop on the topic of Vet Benefits by Dr. Richard Robitaille was well received. We also gave a brief EC update including information from the Feb EC meeting along with TAP advocacy efforts tied to Student Advocacy day.

May 7<sup>th</sup>- Support Staff workshop- Molloy College, Co-chaired by Gene Rogers/Angie Esparza.

Attendees- 25

Presentations included FA 101, a financial literacy session along with a session on dealing with students/people with negative attitudes.

May 9<sup>th</sup>- St Joseph's college

Attendees- 24

Presentations included: Unusual Enrollment, Verification which afterwards we had a panel discussion on the subject.

There was an EC update including TAP white paper efforts, CGNY updates, and a call for volunteers.

### 2. Other trainings:

Region 7 was once again very active with CGNY efforts during the year...3 events were held over the course of the year. A pilot program on early awareness was conducted at an elementary school (Nassau County) during the spring to good reviews.



3. **Treasury update:**  
\$3162.49 (as of 9/29/2014)
4. **Conference news:**  
N/A
5. **Upcoming meetings:**  
Holiday meeting- Dec 12<sup>th</sup>- Jericho NY
6. **Regional comments:**  
Institution/individual membership...where does NYSFAAA stand on that issue...will we ever change?



## Region 8 Report

# NYSFAAA Executive Council Meeting October 3, 2014

### 1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Region 8 is hosting the NYSFAAA Annual Conference in Lake Placid from October 21-23. Our region has been focused on planning for this event and held four Conference Steering Committee meetings since the last Executive Council Meeting.

#### **Date and Location:**

6/11/14: Conference Steering Committee Meeting in Lake Placid

7/18/14: Conference Steering Committee Meeting (Conference Call)

8/15/14: Conference Steering Committee Meeting (Conference Call)

9/15/14: Conference Steering Committee Meeting in Lake Placid

Topics and Training details: Nothing to report.

Other Training events that Region was involved in: Nothing to report.

Example – CGNY, Guidance Counselor workshop?

### 2. Treasury update:

Nothing to report.

### 3. Committee Reports:

Nothing to report.

### 4. Conference news (If your region is involved in Conference planning).

I have included with this report the minutes or notes from each of the four Conference Steering Committee meetings (see below) reference above. With 3 weeks to go, registrations for Lake Placid are trailing the Long Island conference by 27. The most recent session matrix accompanies this report.

### **Conference Registration Summary as of 9/29/2014**



	Long Island	Lake Placid			
Weeks to Go	2013	2014	Diff		
7	0	48	48		
6	61	78	17		
5	126	118	-8		
4	189	176	-13		
3	226	199	-27		
<hr/>					
2014 Details	Full Reg	1-Day Reg	2-Day Reg	Retiree	Total
9/1/2014	46	1	0	1	48
9/8/2014	73	1	1	3	78
9/15/2014	111	3	1	3	118
9/22/2014	163	7	3	3	176
9/29/2014	183	8	5	3	199

5. **Upcoming meetings and events:** NYSFAAA Annual Conference in Lake Placid from October 21-23.

6. **Regional comments/Recommendations**



## **NYSFAAA 2014 CONFERENCE STEERING COMMITTEE NOTES FROM JUNE 11, 2014 MEETING @ LAKE PLACID CONF. CENTER**

### **PUBLICITY UPDATE**

- Pat Farmer unable to attend but we discussed that we need to get something out on the conference mini-site to promote the trivia contest
- Also something on mini-site regarding picture of conference center (we will check w/LP Conference Center staff today to see if they can take a picture of us to post to the site) as we want members to see the conference center/setting
- We need to get some travel information, “How to Get to Lake Placid”, etc.

### **FACILITIES UPDATE**

- Mary Ellen Chamberlain is concentrating on handling the “room”-related facility issues and Carole Jenne is focusing on food/beverage-related concerns
  - The committee agreed that our goal will be to have the hotel room reservation process opened up for the full membership for Monday, July 14<sup>th</sup>
  - Before we open up hotel reservation process to full membership we need to get all conference committee members the information on how/when they can reserve hotel rooms
  - Mary Ellen will be emailing the full conference committee early next week, after checking with Catherine Zawadzki of Crowne-Plaza, on how/when to contact the hotel to reserve rooms
  - We will give the conference committee until Friday, June 27<sup>th</sup> to contact hotel with their room preference/selection
  - All members should have option to either call-in or go on-line to reserve room
- Carole Jenne indicated we are waiting on a few amended BEO's from CenterPlate to additions we asked them for (fresh fruit at breakfast and dessert selection for dinner) and expects those amended BEO's shortly
- We are having a walk-through later today of the concurrent session rooms to have an update from Jackie Kelley, Conference Center Coordinator, on specifics of audio/video/tech specs of those rooms





### **TRANSPORTATION UPATE**

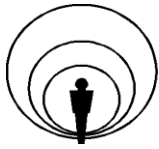
- Shalena Duprey talked about the possibility of the new planned Cape Air route from Westchester Co. airport to Lake Clear (Saranac Lake) airport and said she would try to secure some more info on that

### **ENTERTAINMENT UPDATE**

- Katrina discussed the “multi-event” issue for Wednesday night and reiterated concern that perhaps we’re not offering enough different types of events for members ; she investigated some additional options to the bobsled simulator which include a low-cost “Cash Cube” where members enter a booth with floating cash (real or fake or both) and try to “catch” as much cash as possible. Todd suggested perhaps tying it to a fundraising effort for scholarship. Also investigated local “Birds of Prey”, which is a local wildlife expert who can bring in native birds of ADK’s with an educational type presentation. Full committee was excited about these options so Katrina will investigate further.
- Holly Z. gave an update on the activities she’s trying to coordinate for the Monday prior to conference – she’s working with local craft vendors to try to arrange a small variety of activities and plans to survey the membership shortly to measure members’ interest
- Laura suggested getting the golf course options information out as soon as possible; Katrina will check with Ashley Andrews on that; we believe the Crowne Plaza may offer complimentary green fees as well; that information should be available on hotel web site
- Carolyn asked if we might want to have a short video/slide show as part of the Welcome component of the conference that introduces the Adirondack/Thousand Island region to members and highlights the colleges that make up Region 8; perhaps a local student to speak briefly about the area. Shalena said she can see if a North Country student might be able to speak for a few minutes with a locally-produced video on the area (perhaps Conference Center staff already has something we could use). Katrina and Shalena will see if we can come up with something

### **VENDOR UPDATE**

- Laura is giving Ashley Andrews a list of questions today regarding shipping/storage and prices on electric needs of vendors
- Will work with Heather and Registration Committee on vendor-related issues
- Other than that, Laura feels that “we’re good to go”
- Will have Welcome letter for vendors on the conference mini-site
- Policy in effect of “first-come/first-paid-for” as far as booth space
- Laura is checking on EASFAA & NASFAA conference vendor lists to make sure we’re not missing any potential vendors



- Katrina suggested some type of motivational game to get folks to the vendor area (she gave Laura an idea from recent conference); winner would get gift card prize.

## **REGISTRATION**

- Heather indicated they're gathering info from various committees as to what needs to be on the registration form
- Ordering supplies for nametags
  - Also need a supply of NYSFAAA pins for registration table
  - Table tents for banquet if we decide to go with that format/discussion on using table tents set up on table at back of banquet room with member name & entrée selection that member picks up and takes to table so can be used to hold table/seat OR just put a card in their conference ID with same dinner info on it that they bring with them to dinner/to be decided at later date
- Question: Who will provide laptop for registration table (for those who need to register on-site) – we'll have better idea after our tech tour of today
- Laura asked if the registration should have/might need a wireless printer (if we determine this to be necessary, both NCCC and Plattsburgh believe they can access one for use)
- WE CONFIRMED WE WILL OPEN UP ON-LINE CONFERENCE REGISTRATION FOR AUGUST 1<sup>ST</sup>

## **TECHNOLOGY**

- Bandwidth capacity discussion; Todd will check today with conference center staff (Jackie Kelly) to confirm whether we need to have any special dedicated sign-on, access for presenters
- Todd has ordered 12 2-way radios from Wells Communication; we rent them for \$250 for full conference
- Committee will come up with list of needed laptops
- Goal is to stick a laptop in each session room

## **PROGRAM**

- Sue informed us that the keynote speaker will be Dr. Humor with a \$3000 cost for keynote and he will also do a breakout session on Laughter Yoga with additional cost. Anticipating his full cost could range \$4000-\$5000
- Another speaker will be Jerry LaVine, oldest person to hike all 46 ADK peaks; with Jerry will be Mike Lynch who was the media person who covered Jerry's accomplishments; they will speak during Wednesday's breakfast
- Lisa indicated they're in process of working out the breakout sessions; things are moving along with significant progress
- They have discussed possibly doing a Novice track of sessions
- Have firmed up Karen McCarthy of NASFAA and have invited EASFAA President to speak
- The Federal Update will be the closing session

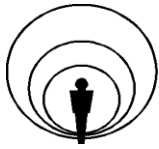
## **OTHER/MISCELLANEOUS**

- Best Practices Display – Lisa clarified that it normally is set up in same room/area as the regional raffle items
- Lisa sent out information to schools about the Best Practices display in at the end of August and then sent a reminder out in mid-September
- Lisa will send Kerrie Cooper more information regarding BP display
- Lisa asked if we can make room for a display on the State-wide Committees with committee descriptions, roles and time commitments; we can ask various state-wide committee chairs to write up



their committee's description/ goal is to have opportunity for conference attendees to learn more about the committees and hopefully register as a new volunteer for a committee

- Does the Conference Committee want to order committee shirts/vests? We decided that there are generic "Ask Me" buttons used at prior conference(s) that we could use in lieu of ordering vest/shirt; buttons could be worn throughout conference. Kerrie said she only noticed 3 such buttons in the conference box passed to her from Long Island but Lisa thinks she has a box that may have more "Ask Me" buttons
- NEXT STEERING COMMITTEE MEETING WILL BE FRIDAY, JULY 18<sup>TH</sup> VIA CONFERENCE CALL/DETAILS FORTHCOMING



## NYSFAAA 2014 CONFERENCE STEERING COMMITTEE NOTES FROM JULY 18 CONFERENCE CALL MEETING

### ENTERTAINMENT UPDATE

- Kat needs to iron out Birds of Prey program as far as what time of day and to have the wolf or not
- Amanda Prescott offered to do Zumba class complimentary
  - Kerrie C. asked Scott about a waiver form
  - Shalena remembers having to get an additional insurance rider to do the 5K walk/run in 2006
  - Kat will create a waiver form and form can be run by Kerrie; form will include Morning Walk, Zumba activity if offered and the Monday AKD activities

### FACILITIES UPDATE

- Carole spoke w/Caitlin Howley of Center Plate; **the food contract needs to be signed and submitted 30 days in advance with a 75% deposit which would be approximately \$41,250 (our food costs with CenterPlate we are expecting to run at approximately. \$55,000)**
- Carolyn will send out NYSFAAA-wide email around July 21<sup>st</sup>, at the point that we open up Hotel Registration to let members know how to register for hotel
- Mary Ellen Chamberlain will check on Scott Atkinson's hotel accommodations to ensure he has a suite

### VENDOR UPDATE

- Laura reports all going well
- She received info from Ashley Andrews on shipping/receiving for vendors
- Still To Do: plan massages and scavenger hunt for vendor area

### PROGRAM UPDATE

- "Rolling along"
- Lisa reports we have a pretty solid program planned
- Need to find some presenters
- Not quite ready to post draft agenda to mini-site but Sue Merchant did write up a teaser for the site

### PUBLICITY UPDATE

- Pat unable to join call today

### TECHNOLOGY UPDATE

- Not much to discuss since last meeting
- Using public Wi-Fi; will have to hand out/distribute a password for users
- Keynote Speakers had some special requests but Todd thinks all of their requests can be accommodated



### **REGISTRATION UPDATE**

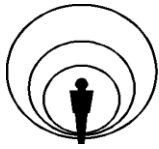
- Need to order some name badges
- Need to start putting up web site once final agenda is done; Heather will work with Ideta Daniels on waiver form for the activity waiver (to have on-line)
- Heather emailed all committee chairs to get Heather information relevant to their committee that should be on the conference mini-site
- Discussion on Deadline for Registration – possibly the Friday before conference starts (October 17<sup>th</sup>?)
- Goal is to have Registration process accessible for August 1<sup>st</sup>; only thing preventing at this point is finalized program
- Sue Merchant will submit to Heather a list of concurrent sessions on 7/29
- Somone noted that Pat Farmer is working on more trivia questions

### **NEXT MEETING - CONFERENCE CALL ON AUGUST 15<sup>TH</sup>**

### **SEPTEMBER MEETING DISCUSSION**

1st choice is September 15; 2nd choice is September 11th/Carolyn will contact Conference Center to see which date is open

**ASSIGNMENT FOR AUGUST 15<sup>TH</sup> MEETING – Please think about what signs are need for your respective committee’s activities and develop a list of needed signs for 8/15 meeting**



## **NYSFAAA 2014 CONFERENCE STEERING COMMITTEE NOTES FROM AUGUST 15 CONFERENCE CALL MEETING**

### **ENTERTAINMENT**

- List of needed signs is done
- Survey went out for Monday pre-conference activities; 72 responders back and roughly half are interested in these activities/Holly to approach instructors/short form will be available for folks to register & Holly will collect registrations/payments
- Wednesday night Cash Cube going on simultaneously with DJ; discussion on whether to connect Cash Cube to NYSFAAA Scholarship; most folks in agreement that we should
- Carolyn confirmed with Kat that Carolyn will contact Crane Music professor to arrange for student musical group for Tuesday receptions
- Discussion on when/where to do Birds of Prey program – agreed should be done Tuesday in conjunction with Party on the Patio at hotel

### **FACILITIES**

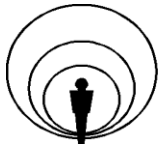
- Mary Ellen has list of rooms reserved; so far 88 reserved rooms; Scott's suite is set
- Carole gave update of August 12<sup>th</sup> meeting where she and Carolyn went through all events requiring food/beverage and will be requesting BEO's to reflect no sales tax charges/Scott will need to sign final BEO by 9/21 and submit with 75% deposit to CenterPlate
- Questions regarding bags for the "Snacks to Travel Home With" for Thursday/ Lisa offered to send Carole info on the company they used for Saratoga conference
- Kerrie C. will send the Executive Council Monday meeting food order to Carole
- Kerrie asked about whether we'll use meal tickets; since only meal that is not a buffet is Wednesday dinner, decision made by the group to make a dinner card that will slip into the name badge
- We will need final dinner choice counts 10 days prior to event

### **PROGRAM**

- Heather will take care of time correction for new member reception and session changes on the conference mini-site
- Kerrie C. asked about printing needs /signs required – Conference Center said they could provide easels/signs for concurrent sessions
- Carolyn will ensure that Conference Center, CenterPlate and Crowne Plaza get initial program and any updates as far as session names, room changes
- Kat will send Program co-chairs an update to include the Morning Walk around Mirror Lake in the program

### **PUBLICITY**

- Pat would like to put in some teasers on session speakers; asked what should be highlighted as far as sessions/speakers - folks responded that we need to highlight the DRESS CODE IS INFORMAL, something should go out mid-August, early September
- Kerrie suggested that once registration is open, almost weekly teasers/publicity updates should occur
- Kerrie and Carolyn will write an welcome greeting for the email that announces opening of registration



## **REGISTRATION**

- Heather announced the web site is still being built
- Heather will submit changes talked about to date
- Signs – unsure at this point except to know that will need registration signs at hotel directing folks to Conference Center for Registration
- We need to make space in Registration area at Conference Center for:
  - Perkins Loan Grass Roots Campaign (and have signs)
  - NYSFAAA campaign to register volunteers for various committees
- We also need to be sure to have space somewhere for:
  - Regional Baskets
  - Best Practices displays

## **TECHNOLOGY**

- Todd looked at the program for concurrent sessions to figure how many laptops needed; he's figuring minimum of 6 but would like to have a total of 9; Plattsburgh can provide 5 laptops so needs another 4 or so.; Canton will check to see if they can offer some – Todd suggested that Lisa bring a few
- Todd checked on walkie-talkies and we may get them for no charge
- He'll start working with Program Committee next month
- Will also start working on collecting pictures for monitors; also during lunch displaying photos set to music and displaying evening and day entertainment pictures

## **TRANSPORTATION**

- Talked about signage needs
- Shuttle info at BOTH hotel and conference center
  - At conference center, shuttle info signs on each floor
  - At hotel, shuttle info in lobby area
- If Program Committee is aware that speakers will need transportation, please let Pat know

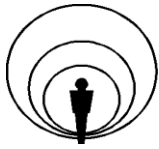
## **VENDOR**

- Laura is working with Ideta Daniels on on-line vendor registration; keeping vendors updated on registration process
- Laura informed Todd that vendors will be sending Laura their logos and suggested displaying them intermittently throughout conference center
- Still working on No. Country Community College students doing massages
- Laura asked if longer, detailed Program will be on-line (she's on Buffalo 2015 Conference Committee)

## **MISCELLANEOUS NOTES/COMMENTS**

- Kerrie asked about conference photographer – responsibility of Registration Committee to secure someone
- Facilities needs to do Room Assignments for concurrent sessions – Carolyn will do and send out to all committee co-chairs/ on-going updates and changes will be required
- Collegiate Productions has a catalog that they will share with Heather and they do printed signs
- Lisa made it known that as room assignment changes are made to the program, she will need the updates for full program updating on website

## **NEXT AND FINAL PLANNING MEETING WILL BE MONDAY, SEPTEMBER 15<sup>TH</sup> AT CONFERENCE CENTER IN LAKE PLACID**



## NYSFAAA Conference Planning Meeting Notes: 9/15/14

### On-Site

#### SINAGE:

- Ashley will provide outside of each room – or we can do it. They have easels – in front of every single room. (General session, concurrent sessions, transportation info in both hotel and conference center)
  - Will also need one for best practices, scholarships etc.
  - Yes, we will need some extra easels – 5 should be enough.
  - Last minute signs – can be replaced quickly.
  - DEADLINE for Ashley to get sign information (2-3 wks. in advance of the conference)
  - Need to ask Crowne Plaza what/where we can put signage. (They said they will provide 3 easels for the signs we need at the hotel – likely will use those produced by Ashley)
  - Carolyn/Kerrie will coordinate list of signs needed with Ashley.

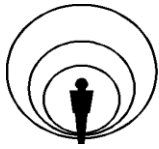
#### CONFERENCE CENTER MONITORS:

- Watched a sample of one –
- May have too much text and pace is too fast to have time to read each slide – suggest slower pace and agenda highlights, but it looks really good!

#### PROGRAM

- R2T4 topic – found presenters (will need meals only)
- SUNY initiative getting firmed up – then long program will be in good shape and all presenters will be in place.
- Natasha from the Dept. is expected to be here unless they shut down? Will need a backup plan if Natasha can't come? She could do this remotely unless the gov't shuts down.
- If there is a gov't shut down, what do we do with federal sessions?
  - Plan B would be to try to have them present remotely?
  - Todd will work with Howard on plan B technology. (I.e. go to meeting) Ashley will need to know the hardware needs – Kerry L. will connect with Howard.
- No news from Jeff Baker yet
- Need moderators – 15 still needed.
- Session handouts – when available on the website – Todd will preload on the room laptops. Need to put them on the website – by October 10<sup>th</sup>. Send them to Todd and Heather.
- Put long program on the website as soon as the last two (a &b) are set,
- Conference co-chair with president's welcome? Will add this to the program.
- Social media session speaker needs to be able to browse the internet during his session – Ashley is aware.



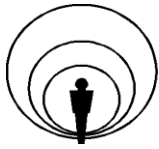


### **ENTERTAINMENT:**

- Drum up business for the Adirondack event?
- Zumba class by Amanda Prescott – Tues/Wed am? But not sure if Sue will approve her out of the office (Ashley could provide space for this at the conference center) would need an insurance rider/certificate? This would be at the same time as the morning walk.
  - Ashley will look into a local Zumba instructor who may have the insurance – will get us cost (\$5 each max)
- Kat will get someone for the am walk leader (Carolyn said yes for one of them)
- Is everything set for fire pit food? Yes, per CJ.
- Birds of Prey (will need more lighting at Crowne Plaza) guy is checking out the lighting.
- Massages on Wed? Ashley will follow up with NCCC (she works there too?). Kat gave Ashley the times. For 4 or so chairs?
- Carolyn – the students from Crane for Wed? She talked with the professor – they are forming the group – either a 4-5 person jazz quart/quintet. Carolyn will find out if there is a piano available and will let Kat know. She should have this firmed up in the next two weeks.
- List of restaurants at the registration desk – will include discount info for that week too.
- Ashley said there is a Lake placid table in the conference center that will have area information too.
- Info bags will be given out when they check in (thin plastic bags) 325 at the most. We can add to the bag too. We may have a conference give-away bag too.
- Where to we say the NYSFAAA donation will be \$1 for the cash cube (put it on the sign and in the program). Ashley has a raffle box we can use. There will be three prizes.
- We also need to let folks know the simulator is \$5 too.

### **VENDORS:**

- 24 signed up so far – goal was 25 so looking good.
- Welcome package and shipping instruction done
- Logos to Todd.
- Bingo card game when visiting vendors for drawing at the end. Need a prize for this! Has enough \$ in the vendor budget – at least two winners. \$10 max to stay in compliance – some sort of Lake placid item?
  - Announce the winners Thursday am at the general session.
  - Laura will work on cost of bingo cards – should be only about \$15.
  - Confirmed vendor tear down time with Ashley – Ashley will get back to Laura, but Mary Jane said it should be at 3:30 for breakdown time and massages need to end at 3:30 too.
  - Ashley asked about signage for each booth? Does Laura need a layout? Yes, once Laura knows who they all will be. Ashley will start with 25. Assigned on a first come first served basis – better spots for early folks.
  - Laura asked if we were supplying a snack bag – yes. Could Laura provide these to the vendors too – they could be a thank you bag (CJ added it to her list). Sometimes the vendors don't stay after they breakdown so get these to them early. Water bottles – should go through centerplate? Or use the water stations that are being set up.
  - Do the vendors need any power? No one has said yes yet per Laura, but she will follow up with the vendors.



### **TECHNOLOGY:**

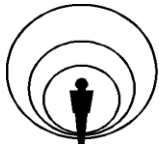
- Todd has enough lap tops lined up (has a couple extra)
  - He will stop in at some point to make sure they will work ok
  - Salon C will likely be hardwired for the whole conference (cost is \$100 for the whole conference per MaryJane)
  - Key note speaker – had specific requests – LCD projector, mic with 12ft cord. Lap top needs to have a CD player, etc. Todd will send Ashley the details again. MaryJane added the presenters should bring a jump drive for their presentations in case there is a size/format issue.
  - Walkie-talkie class on Sunday.

### **PUBLICITY:**

- Denim to fleece – be comfortable
  - Come to dinner dressed comfortable – casual attire
  - Include detail on location of Wed night dinner so same outfit is okay
  - Week prior to – post session handouts
  - Highlight opening speakers, birds of prey...
  - Teasers – no prizes, just post answers on the monitor – get this to Todd
  - Conference chairs/ will be identified with a ribbon
- Weekly notices now!
- Count down - yes
- Room reservation deadline – This Friday, September 19<sup>th</sup>. – include this in this week's reminder!
- Promote free golf on executive course? Kat will get me the info.
- Drum up attendees
  - Email to other groups – from co-chairs? SUNYFAP
  - CICU – can we post an email? PF sent CICU an email to find out.

### **REGISTRATION:**

- Name badges and ribbons ordered – will be here soon.
- Need to find out when conference center opens each day
- Contract says 3 for registration start time – can we get in earlier to set up? Will ask Ashley.
- Put name tag and ribbons together on Sunday or Monday morning? Looks like a Monday task
- Steps for on-site registrations (118 registered to date). – will have a laptop for folks to register if needed
- Will let folks attend if they have some type of proof of payment...
- Will add steering committee to the website
- Monday conference classes are also on the website too.
- Give-away bag at registration? Kerrie and Carolyn mentioned one and then use a very low cost bag for the last day snack bag. Kerrie following up?



### **FACILITIES:**

- Food related
  - All set with Centerplate – invoice submitted – have to pay 75%
  - BEO (banquet event order) is the name of the invoice
  - We have up until 7 days prior for any count changes for all meals.
  - Publicize via signage that coffee station is available for NYSFAAA at the hotel
  - S'more gathering is all set
- Snack bag and contents
  - Snack bag type:
  - Paper for snacks with a logo sticker?
    - CJ following up with Kerrie/Carolyn
  - Contents TBD
- Concierge table at the hotel – perhaps not really needed
- Special dietary needs – need to pass those names onto Carole from Heather and CJ will contact Centerplate
- Room info
  - 154 rooms so far.
  - Conference committee – who is coming in Sunday or Monday:
  - Kerrie made a list.

### **TRANSPORTATION:**

- Find out about handicapped accommodations on the shuttle and then promote/ask – can work thru Heather. PF ask Ashley. Get contact info from Ashley ASAP.
- Conference center can allow special parking out front if anyone has a handicap parking permit. Mary Ellen will send an email to find out.
- Signage through Ashley –
  - In registration packets, in conference center and hotel
  - Wed night add is ground force one from 5:45 to 1 am.
  - Ashley will get invoice on main bill if possible, and if not will get it to PF.
  - Conference center shuttle for hotel to conference center – check website about text for the shuttle – up and down the hill?? May need to ask Heather to update website text for this.
  - Town “trolley” runs from Price Chopper to the ski jump? (May have missed the outside loop locations) – takes about a half hour for the loop.

### **ASIDES:**

- Pads/pens will be provided at the rooms.
- Regional goodie basket – large basket needed (PF will get an Amish basket) – Oct 15 deadline to get goodies to PF. (Todd and Kerry L. made a cash donation)
- Third floor of conference center question– open area – group seating – living room style set up per MaryJane.
- Folks at dinner without tags – have a list to double check and if not on the list, take their name and give them a meal ticket. Heather will have a few extra dinner tickets printed.

