

NYSFAAA

New York State Financial Aid Administrators Association, Inc.

2014-2015 Annual Report



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President's Remarks

NYSFAAA President 2014-15 Annual Report

Remarks: I have to say that this first year of my Presidency has flown by! I believe we accomplished a great deal while there are many things left to be done. I will try to outline everything that I can in this report. It has been a pleasure to work with the current Executive Council and I look forward to working with the next one. We have tried to use a team approach to everything that we address and this works very well. Every member of the team has something different to offer so it is important that we embrace that as we work together on accomplishing the business of the organization.

2014-15 Executive Council

Kerrie Cooper – President – SUNY Canton
Scott Atkinson – Past-President – SUNY Brockport
Janice Scheutzow – First Vice-President – Nazareth College
Howard Leslie – Second Vice-President – Berkeley College
Kerry Lubold – Treasurer – SUNY Plattsburgh
Pat Johnson – Past-Treasurer – Syracuse University
Kathy Flaherty – Secretary – SUNY Oswego
Sean Hudson – Region I Representative – Canisius College
Melissa Casselman – Region II Representative – Nazareth College
Darrin Rooker – Region III Representative – New York Chiropractic College
Kristina Delbridge – Region IV Representative – SUNY Empire State
Roberta Daskin – Region V Representative – Sarah Lawrence College
Lucy Villaquiran – Region VI Representative – Monroe College - Bronx
Eugene Rogers – Region VII Representative – Molloy College
Todd Moravec – Region VIII Representative – SUNY Plattsburgh

2015-16 Executive Council

Kerrie Cooper – President – SUNY Canton
Darrin Rooker – President-Elect – New York Chiropractic College
Janice Scheutzow – First Vice-President – Nazareth College
Howard Leslie – Second Vice-President – Berkeley College
Kerry Lubold – Treasurer – SUNY Plattsburgh
Robert Zasso – Treasurer-Elect – Dutchess County Community College
Kathy Flaherty – Secretary – SUNY Oswego
Kathy Michalski – Region I Representative – Niagara County Community College
Margaret Christian – Region II Representative – University of Rochester, School of Dentistry & Medicine
LaSonya Griggs – Region III Representative – Tompkins Cortland Community College
Michelle Fountaine – Region IV Representative – SUNY Empire State



Diane Donohue – Region V Representative – Bard College
Melanie Williams-Bethea – Region VI Representative – Columbia University, Teachers College
Amy Thompson – Region VII Representative – St. Joseph's College
Todd Moravec – Region VIII Representative – SUNY Plattsburgh

Goals & Objectives for 2015-16:

- My first goal is to make sure there are new Goals & Objectives for NYSFAAA for next year. This is still a new process for the organization. We have a draft to be voted on at the Conference meeting. As soon as they are approved we will release them to the entire organization.
- Review and increase communication strategies with constituency.
- Continue advocacy efforts with most recent issues (Perkins Loan program, Reauthorization, PPY process and NY TAP issues, other TAP Reform issues).
- Provide guidance and support to all committees as needed in meeting all goals and objectives.

The Long Range Plan

This is the first full year of review of our organization in terms of the newly implemented Long Range Plan. This is a good tool for NYSFAAA and its committees to use as we plan for the future. This implementation has not been without its bumps along the way but that is expected in any new process. The Committees have been asked to use it as a planning tool in developing their goals & objectives for the year and this has been taken to heart. The Governance Committee evaluated the annual reports last year in terms of the Long Range Plan and their assessment was discussed at length and used to develop our draft Goals & Objectives for 2015-16. We will make adjustments in the Operational Calendar to make sure that they are completed in a timely manner next year. We learned a lot this year!!

Summary of Activities:

Communication & Technology

One of my main goals has been to increase communication of Executive Council activities to the constituency. This is a slow process and I know that I have a long way to go! I have begun letting regions know when the Executive Council will be in their regions so that they could attend if they wish. I had been invited to a few Region meetings and try very hard to attend as many as I can. Several options for additional modes of communication have been discussed as possibilities in the process of developing the Goals & Objectives.

Our Technology, Innovation and Communications Committee (TICC) under the leadership of Lea Nuwer and Heather Adner, continues to provide wonderful services in conjunction with our training committee on expanding our webinar offerings. Heather is a new co-chair replacing Amanda Prescott who moved into a new position on her campus. In our draft Goals & Objectives we hope to utilize this committee more over the next year (and beyond) in making sure our website is up-to-date and as dynamic as possible. I have full confidence in this committee's ability to move us forward.



Fiscal Stability

We are very pleased to report that our audits are almost up to date with the 2013-14 audit being finalized now and 2014-15 in process. Our Treasurer, Kerry Lubold and Past-Treasurer, Pat Johnson have done a wonderful job working with the auditors on this big task.

The auditors requested that we adopt a mandated Conflict of Interest policy. This was developed and approved by council during the year. The NYSFAAA budget committee under Rob Zasso's leadership worked very hard in developing a balanced budget for Council to approve. Council had to make some tough decisions as we are determined to be as prudent as possible in our fiscal decisions. One of these decisions was an increase to membership dues for 2015-16.

We are proud to say that Tami Gilbeaux, Inceptia, volunteered to lead our Development Committee. She truly hit the ground running in researching grant opportunities and procedures. She has already submitted several letters for possible grant opportunities. We are working on getting a committee of regional representatives to assist her in this monumental task. We are all learning a great deal about the grant process.

Deb Evans and the Scholarship Committee are increasing fundraising efforts this year for the scholarship fund having created the first NYSFAAA Cookbook. I look forward to seeing many recipes from across the state and trying them out.

Advocacy and Public Policy

Advocacy is probably what I have spent the most time on this year. Each year can be different regarding priorities and active issues. This was a very active year for the Perkins Loan Program especially. Working in conjunction with Patrick Zeigler, our Federal Government Relations Chair, Maria Livolsi, President of COHEAO, and several NYSFAAA members, we advocated hard for Perkins. Some examples of events that occurred are:

- ✓ Regularly scheduled conference calls with a core group that kept us updated and allowed ideas to develop.
- ✓ Encouragement of all NYSFAAA members to contact their Congressional Representatives to support this program.
- ✓ A meeting was held in May in Region IV with Congressman Paul Tonko (NY-20). We had several Region IV members, myself and a student representative from SUNY Albany. We expected 20 minutes with him and we got 2 full hours. It was a wonderful meeting and he was impressed with what we had to say.
- ✓ Letters requesting support were sent to all NY Congressional Representatives and key members of the HELP Committee. Several responses were received supporting this program which was evidenced by the letter that Congresswoman Louise Slaughter (NY-28) sent to the House Committee of Education and the Workforce with 95 signatures of support.
- ✓ I was invited as NYSFAAA President to a press event sponsored by Congresswoman Slaughter in her Rochester Office in support of the Perkins Program.



As it turns out the House did vote to support extension of the Perkins Program with bipartisan support. There was also support in the Senate with the exception of Senator Lamar Alexander who held up the support at the final second. While we were not successful yet we are continuing our advocacy! Several bipartisan Senators have begun their own letter of support and we have urged our Senators to sign on. All this when several months ago **no one** supported the program and demise was sure. This exercise has proven to our students on our campus that they can actually DO something about issues!

On the NY State side of things Sue Mead, our State Government Relations Chair, does a wonderful job pulling things together for us. Events that took place this year include:

- ✓ I attended the annual NY Student Alliance Supporting Organization luncheon in Albany sponsored by CICU. This is the organization meeting for the NYSAA Advocacy Day.
- ✓ As part of the TAP Coalition I participated in a meeting with Jay Quaintance, Asst. Deputy Secretary for Higher Education in the Governor's office, in relation to TAP reform. Several possible items were discussed with him.
- ✓ We had a successful series of Legislative visits after our Executive Council meeting in February in Albany. We continued our goal of promoting TAP reform and met several legislators who were happy to discuss things with us. . We anticipate that this year there could be a slight shift in priorities as we begin discussions on the use of PPY for the FAFSA and its implications for TAP. We will keep everyone updated as we know things.

We look forward to more advocacy in 2015-16!

Training and Leadership Development

Our webinar training programs continue to be popular and a great way to get people involved in training when they are unable to leave the office. Our training committee, under the leadership of Howard Leslie and Kristina Delbridge, does a remarkable job getting several webinars done each year with top trainers. There are ongoing discussions regarding timing and getting people more involved on the regional level. For the 2015-16 academic year we will be sponsoring two regional statewide training events where the training is held as a webinar but in conjunction with a regional meeting. We want to continue with the successful webinar format but combine it with getting people together regionally for face to face interaction. The webinar format cannot and should not replace the face to face meetings but we need to find a good balance to maximize the benefits of each.

We brought back the NYSFAAA Intermediate Training Workshop this year. This has been a biannual event to bring training to up and coming leaders. It is important training and well received. Enrollment was low this year but those who attended saw its importance. It will be reviewed to make it as successful as possible in the future. I believe it fills an important need.

Novice Training continues to be a flagship event. We have benefited greatly from Lisa Simpson's leadership and she is in the process of training a new Chairperson, Theresa Weimer from Wagner College. NYSFAAA will fully support the new leadership and look forward to working with Theresa. We cannot thank Lisa Simpson and Lisa Papke enough for their service in this important area.

We have 7 of 8 regions sending new representatives to Executive Council this year. This is exciting to see this many new members wanting to get involved and I look forward to working with them.



Outreach

NYSFAAA continues to excel in providing Financial Aid Nights in local high schools across the state. These are becoming even more important to get information out directly to those needing it. In conjunction with School Counselor Workshops that are provided to inform school counselors of the latest changes in the financial aid arena we feel we are covering the high school students at all sides.

It was a few short years ago that we added a membership category, the affiliate member. In 2014-15 this membership dropped significantly. We want to do more to encourage this membership and provide opportunities to build on these relationships. Toward this, the descriptions of the membership categories were clarified to ensure members were applying to the correct categories. NYSFAAA had another successful year with the College Goal New York Grant and have signed the contract to continue with it in 2015-16. Regions are doing wonderful work with this grant to provide another avenue to assist students to get their FAFSA completed early and accurately.

Upcoming Meetings and Events

- ✓ NYSFAAA Conference 47 in Buffalo – we are pleased to be here!
- ✓ NYSFAAA Conference 48 in Verona at the Turning Stone Casino
- ✓ Executive Council remote meetings in December, April and August.
- ✓ Executive Council meeting in Albany in February with legislative visits
- ✓ Executive Council retreat and planning meeting in June.

Join us at any and all events!

Recommendations

I recommend that NYSFAAA members be as actively involved as possible! Our leadership opportunities begin at the grass roots. I urge Directors to get your staff involved in regional and/or statewide activities. I have found that staff members who are allowed to participate are happier and more productive in the office. They are learning the necessary skills to be future leaders, whether on the institutional level, regional level, or statewide level. I am a Director, I know how difficult it is to maintain staffing levels while attempting to allow staff to get out of the office or participate more. It takes planning but I have found that it is worth it in the long run.

If someone is interested in working with a committee please speak up and we will get you in touch with the Committee Chair.

Conclusion

In conclusion I would like to commend the current officers and regional representatives on a job well done in the 2014-15 year. This can be a tough but very rewarding job. It has been a great team to work with. That said, we welcome the new members of Executive Council, and a new President-Elect, Darrin Rooker and new Treasurer-Elect, Rob Zasso. I know it will continue to be a great team!



*New York State Financial Aid
Administrators Association*

While not all committees were mentioned specifically in this report, that doesn't mean they aren't busy! All of our committees work very hard to make our presence known in New York. Without their generous time and commitment we wouldn't be where we are today.

I also want to let members know that if you ever have questions or concerns to please feel free to contact me or anyone on Executive Council so that we can help ensure that we are addressing all needs.

Respectfully submitted,

Laurie A. Lopez



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 2015-2016 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 2015 awards. Though nominations have been low in number this year than in the past, 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 2015 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.

Upcoming Meetings and Events:

Our next meeting will be at the 2015 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: 10.15.2015



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

Summary of Activities:

Starting in January 2013 and continuing through October 2014, planned for the association's annual conference which was held at the Lake Placid Conference Center/Crowne Plaza Hotel & Resort, from October 21-23, 2014. We held six (6) meetings in 2013 and seven (7) in 2014. These consisted of primarily conference call meetings, some planning meetings that we held in conjunction with region meetings, and a few on-site meetings. The conference provided a diverse and informative selection of sessions as well as networking opportunities and some non-financial aid programming/activities that challenged attendees to "get out in it, walk in it and touch it", all in the beautiful small-town, nature-based, historical village of Lake Placid. We had 217 full-day registrants and a total of 242 total participants, including 27 vendors.

Recommendations:

General:

- It would be helpful if NYSFAAA had a conference planning site and/or listserv on the main website for exchange of documents and discussions during the planning process.
- We encourage all regions to create a final report to assist the next conference committees and to keep the conference planning manual updated.
- Having Co-chairs for the conference was helpful in spreading out the work. We split the committees so that each oversaw four committees. One co-chair acted as liaison with the Executive Council and the other handled much of the administrative duties like minutes of meetings. It is critical that someone be designated to be the liaison with Executive Council.
- Take advantage of the reports that are available in the Event Management section of NYSFAAA.org. They were very helpful especially after registration begins.
- Co-chairs and registration co-chairs need to have access to Event Management for reports until the final report is submitted to Executive Council the following February.
- NYSFAAA should create a policy regarding conference speakers who wish to attend other parts of the conference. We talked with several people and there was no such policy so we came up with our own. We said they would need to register as a day participant for any day they were not presenting.



Program:

- It might be useful to use this bulleted list as a checklist as a supplement to the program section of the NYSFAAA conference planning manual. Each conference committee could establish specific deadlines for each item on the list.
- It would also be most helpful to have a standard set of templates that could be used for the overall conference schedule, long/short/pocket programs, e-mail communications to presenters, session proposal forms, presenter bios, follow-up thank you notes, etc
- **Jeff Baker**, while difficult to confirm because of uncertain travel budget support, indicated that it would be most **helpful if he were scheduled as a presenter for multiple sessions**. He seemed very interested in offering the opportunity as it might allow him to confirm early and justify attending the conference, rather than offering a “remote” presentation that gets confirmed at the last minute. This was his suggestion, just prior to the conference and after it was too late to book additional sessions

Facilities:

- We neglected to offer coffee on Tuesday morning in the vendor area prior to the start of the conference, however, the event planner was quick to remedy this situation
- Due to the floor levels at the conference center, improved signage was needed regarding what rooms are included on each level as different room names were used on different pieces of literature / Be sure that the various rooms/areas are consistently named in all literature and on all signs

Registration:

- Develop a calendar with the Conference Steering Committee and set deadlines, especially for when the tentative agenda will be released. You must know this information in order to build the registration forms which can take up to two weeks
- Print a copy of the prior year conference mini-site as a guide to the information you need.
- Determine if you are going to allow guests at the banquet, the charge, and/or if you want this option added into the online registration process as a separate fee
- Consider a reduced early-bird registration fee. Currently there is no penalty for waiting until the last minute to register and/or pay for the conference. This made planning difficult

Entertainment

- Recommend continuous support of local college students during receptions to provide voice and/or instrumental music
- Recommend continuous support for other local entities as well. All entertainment activities were in support of local establishments and talent/artists/businesses, as well as the ambiance of the beautiful town of Lake Placid
- Additional activities planned (e.g. pre-conference activities and other activities where cost incurred by NYSFAAA members) caused more work on the Entertainment Committee, but the conference attendees who participated in these events seemed to enjoy them



- The decision to have a DJ rather than a band was in an effort to appeal to the majority of attendees. Bands can be more specific with the type of music they play, which may not appeal to all audiences. Similarly, DJs can also have the same effect. Ultimately, the decision was due to a) cost and b) overall appeal to multiple audiences

Vendor

- Ensure with conference center contact that they will have the room for the number of vendors you anticipate. For 2014 conference, we found out 1 week prior to conference we would need to have an overflow room. 7 vendors were located on a side room from main area; Vendor Chairperson did contact those affected and worked with conference center to make the traffic flow work for all areas
- Had an interactive BINGO game which required attendees to visit vendors to get a BINGO to win a small prize. Conference Center also donated a weekend getaway. We required all vendors to also sign the BINGO card and held a drawing for the winner
- Companies provided logos that were displayed during the conference

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

Date: 10.17.2015

NOTE: Full Annual Report submitted to Executive Council on 2/9/2015



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 together the location, program, meals, entertainment for the 3 days of NYSFAAA's annual conference to provide professional training and networking opportunities to the membership.

Summary of Activities:

We have 35 concurrent sessions planned presenting on program, process and professional development topics. A motivational speaker; Mary Anne Cappellino kicking off the conference, Bruce Weinstein "the ethics guy" is our keynote at lunch on Wednesday of the conference, Justin Draeger NASFA President is speaking at breakfast on Wednesday, Brett Leif Higher Ed insider is speaking at breakfast on Thursday, and Jeff Baker is doing a Federal Update as a general session on Thursday morning. At the banquet NYSFAAA awards will be presented and after, a DJ and photo booth will be provided as entertainment. We have restaurant and "things to do" guides for members who want to explore the city of Buffalo. Members will be able to participate in a Chinese auction for the organization's scholarship program as well as purchase new cook book. The conference committee is really proud of the program offerings with the timely session topics and the lineup of professional speakers presenting.

Upcoming Meetings and Events:

Final meeting with the Buffalo/Niagara Convention Center, and final meeting of Conference Committee members the week of October 19, 2015. Event is scheduled for October 27-29, 2015.

Recommendations:

A final conference report will be submitted after the conclusion of the conference when the Chairperson compiles the committee reports, final budget updates, and recommendations for future conference committee chairpersons.

Submitted by: Laura Worley, 2015 NYFSAAA Conference Committee Chairperson

Date: 10.13.2015



Development Committee

Committee Members:

Tami Gilbeaux, Strategic Business Director Inceptia

LaSonya Griggs, Director of Financial Aid Tompkins Cortland Community College

Goals and Objectives (Long Range):

A priority should be the obtaining of additional means of financial support. The Development Committee was created for this purpose. Unfortunately, this Committee has not been active this past cycle. It is hoped that the revitalization of this committee will enable NYSFAAA to undertake many of the other objectives contained in the LRP.

Summary of Activities:

NYS Grants Gateway—activated NYSFAAA with the Gateway. This participation allows NYSFAAA to be recognized as a participating organization in the Gateway grant application process. As future grants become available, NYSFAAA will have access to the information and be allowed to apply.

Foundation Directory Online—activated NYSFAAA with the Foundation Directory. This participation allows NYSFAAA to have access to private grants. The Committee's focus is to seek grants for scholarships and general operating funds. Letters of Intent (LOI) have been sent to the following organizations:

- Arnold Bernhard Foundation
- Brooklyn Benevolent Society
- Thomas & Agnes Carvel Foundation
- Deo B. Colburn Foundation
- Fred L. Emerson Foundation

Upcoming Meetings and Events:

Continued observation for new opportunities via the NYS Gateway and Foundation Directory Online.

Recommendations:

Increase the Committee by at least 2 additional members

Submitted by: **Tami Gilbeaux**

Date: 10.19.15



Election Committee

2014-15 Committee Members:

Chair – Scott Atkinson, NYSFAAA Past President, The College at Brockport, SUNY

Region 1 – Lisa Tremem, Buffalo State

Region 2 – BJ Revill, University of Rochester Medical Center

Region 3 – Pat Johnson, Syracuse University

Region 4 – Kristina Delbridge, Empire State College

Region 5 – Daniel Robinson, Pace University – Pleasantville/Briarcliff Campus

Region 6 – Michelle Bolton, SUNY Downstate Medical Center

Region 7 – Eugene Rogers, Molloy College

Region 8 – Carolyn Corcoran, SUNY Potsdam

Goals and Objectives (Long Range):

This next year, the Election Committee will be charged with conducting elections for NYSFAAA's First Vice President, Second Vice President and Secretary. The following goals have been established to enhance the election process.

- Establish the 2015-16 NYSFAAA Election Committee shortly after the 2015 conference. Committee members should take an active role at regional meetings to discuss the upcoming elections and solicit candidates from the regions.
- A ballot of two candidates for each position should be constructed attempting to obtain representation across all regions and sectors.
- A series of communications at the state and regional level should be utilized to increase the number of voting members in the statewide election by a 15% minimum. (304 total)

Summary of Activities:

The NYSFAAA Election Committee was charged with conducting elections for the position of President Elect and Treasurer Elect. The Committee was formed and solicited nominations for the positions. A ballot with candidates for each position was constructed and candidacy statements were distributed. Elections were held via electronic vote. The election results were as follows based on 264 voting members:

- President Elect, Darrin Rooker, New York Chiropractic College
- Treasurer Elect, Robert Zasso, Dutchess County Community College

In addition, the regions also held elections for the 2015-17 Councilpersons. The results were as follows:

Region 1, Kathy Michalski

Region 2, Margaret Christian

Region 3, LaSonya Griggs

Region 4, Michelle Fountaine

Region 5, Diane Donohue

Region 6, Melanie Williams-Bethea

Region 7, Amy Thompson

Region 8, Todd Moravec

Congratulations to all of our new officers and Executive Council members.

Date: 10.19.2015



Finance and Budget Committee

Committee Members:

Kerry Lubold, 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 goal for the 2015-2016 year is to continue calling for estimated budget expenses from the NYSFAAA region and statewide chairs to help Executive Council continue making educated budget decisions.

Our long term objective is to promote the major points of the NYSFAAA long range plan by continuing the discussions of the budget in February each year with Executive Council. Continue the precedent of passing balanced budget each year in June for the organization, while making sure the Executive Council knows of any anticipated financial problems.

Summary of Activities:

The Budget & Finance committee was tasked with preparing a draft 2015-2016 budget for presentation to executive council at the summer 2015 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 2015-2016 budget was accepted by Executive Council. This was also the first year we asked for 2 budget requests from the NYSFAAA region and statewide committee chairs. This was done in our first attempt in helping Executive Council see if they would need to raise the membership fees for the organization. We plan to continue and refine this practice as we move forward.

Upcoming Meetings and Events:

Our next meeting will be at the 2016 NYSFAAA Executive Council meeting in February 2016 & June 2016.

Recommendations:

None at this time.

Submitted by: Robert Zasso

Date: 10.15.2015



Governance and Ethics Committee

Committee Members:

Scott Atkinson, The College at Brockport
Anne Barton, Inceptia
Curt Gaume, Canisius College
Heather McDonnell, Sara Lawrence College

Goals and Objectives (Long Range):

The Governance & Ethics Committee is charged with serving as an advisory committee to the NYSFAAA President and Executive Council. It reviews the standards of conduct and evaluates the Association's governing documents & makes recommendations based on historical and current perspectives. The Governance Committee conducts an annual review of the NYSFAAA Long Range Plan and reports to the Executive Council on progress made on plan recommendations.

Summary of Activities:

A review of the governing documents did not yield any suggested changes or amendments at this time. Most of the Committee's efforts were spent in the assessment of the Association in relation to the current Long Range Plan. An analysis was done and the report was submitted to the Executive Council for their evaluation and action.

Upcoming Meetings and Events:

The Governance & Ethics Committee will now be reorganized under the chair of Darrin Rocker, President Elect, who shall set the agenda and tasks for the next cycle.

Recommendations:

It is recommended that the membership of the new committee be comprised of past NYSFAAA Presidents or other officers in order to provide a historical prospective and continuity in deliberations. It's also recommended that the annual review of the Long Range Plan be posted to the NYSFAAA website for the membership to review.

Submitted By: Scott Atkinson

Date: 10.5.2015



Graduate and Professional Concerns Committee

Committee Members:

Melanie Williams-Bethea
Andrea Wedler

Goals and Objectives (Long Range):

Goal 1:

To re-establish the NYSFAAA GPCC.

Objectives:

1. Identify new co-chairs for the committee.
2. Request a member from each region to serve as part of the committee.
3. Hold regular meetings and provide NYSFAAA with updates and suggestions from the committee to address the concerns of this group.

Goal 2:

Identify ways to meet the current and future needs of Graduate and Professional Schools in NYS.

Objectives:

1. Survey Graduate and Professional Schools to identify areas of concern and topics of interest.
2. Based on survey results create training needs specifically for Graduate and Professional Schools.
3. Work with Conference Program Committees to develop a more robust track for Graduate and Professional Schools at the annual NYSFAAA Conference.

Summary of Activities:

None during the past year.

Upcoming Meetings and Events:

November 2015-Schedule meeting with current committee members, to establish a plan for recruiting new leadership for the committee.

January 2016- Re-established committee formulated and meeting scheduled discuss new initiatives and next steps.

Recommendations:

None at this time.

Submitted By: Melanie Williams-Bethea

Date: 10.19.2015



Membership Committee

Committee Members:

Chair- Adrienne King
Region 1 – Leigh Bove
Region 2- Margaret Christian (outgoing) Deidre Strutz (incoming)
Region 3 – Darrin Rooker
Region 4 – Rochelle Filler
Region 5- James Filippelli
Region 6 – Melanie Williams- Bethea
Region 7 -
Region 8 – Patricia Farmer

Goals and Objectives (Long Range):

- 1325 Members
- Collect \$88,260 in Membership Dues
- Hold 4 membership conference calls in 2015-16 to discuss membership issues, outstanding dues, engagement activities, etc. These conference calls are usually held prior to EC meetings. Target dates include October, February, June, and September.
- Develop a plan to engage Affiliate Members
- Develop a plan to invite/ engage Active Members in Leadership roles
- Support other NYSFAAA Committees as needed

Summary of Activities:

- 1319 total members (95.6% of our 1380 goal)
- \$76,580 Dues collected (103% of \$74,000 goal)

Article VI – MEMBERSHIP

1. **Section 1.** There shall be five classifications of membership in this Association, active, associate, retired, lifetime and affiliate.
2. **Section 2.** Active membership shall be limited to those financial aid personnel who are responsible for duties in the direct administration of financial assistance to students at institutions of post-secondary education.
3. **Section 3.** Associate membership shall be available to employees/owners of businesses or organizations that have a business relationship with institutions of post-secondary education or with families to whom they provide financial aid services. This membership category includes vendors and consultants. Associate Members' business relationships may be ancillary to post-secondary financial aid administration but otherwise consistent with the purpose and mission of NYSFAAA. The NYSFAAA Executive Council shall, within its discretion, regulate Associate Membership through its membership policies.
4. Associate membership may also be available to Affiliate members who wish to have voting rights and/or chair a NYSFAAA Committee. In this case, the Affiliate member must pay the Associate member dues.
5. **Section 4.** Retired Membership shall be available to individuals who were formerly members for at least ten years and are now retired from the profession. Individuals who would otherwise currently



qualify for Active or Associate Membership under Sections 2 or 3 of this article are not eligible for Retired Membership.

6. **Section 5.** Lifetime membership may be conferred by a vote of Executive Council upon nomination by the Awards Committee.
7. **Section 6.** Affiliate membership (non-voting, no membership dues required) shall be limited to those individuals whose duties are indirectly related to the financial aid profession in order to directly serve a student clientele. This membership category includes school counselors or other such persons that do not qualify for any of the above membership categories. Affiliate membership is also available to other employees of post-secondary educational institutions such as Bursars, Registrars, Controllers, EOP/HEOP/SEEK Counselors (who are not members of the Financial Aid staff), and student employees, interns, and/or graduate assistants.
 - Reviewed LRP with committee members- ongoing
 - Developed email plan to solicit renewal - ongoing
 - Emailed members the increased dues amount of \$70 and the \$60 rate by 7/1
 - Reviewed outstanding bills timely- solicited payment
 - Conducted Membership Survey and distributed to other committee members.
 - 268 members responded (20%) – see attached survey summary

Upcoming Meetings and Events:

Hold 4 membership conference calls in 2015-16 to discuss membership issues, outstanding dues, engagement activities, etc. These conference calls are usually held prior to EC meetings. Target dates include October, February, June, and September.

Recommendations:

- Meet regularly to discuss regional membership needs
- Communicate with membership more regularly
 - Send renewal dues reminders – invoice reminders
 - Engage the membership with upcoming events
 - Inform membership of Leadership opportunities

NYSFAAA Membership Survey

1. Current Membership Type:		Response Percent	Response Count
Active		92.4%	220
Associate		5.5%	13
Affiliate		0.4%	1
Retired		1.3%	3
Life-Time		0.4%	1
answered question			238
skipped question			0

Submitted by: Janice Scheutzow – 1st Vice President

Date: 10.22.15



Mentoring Committee

Committee Members:

Janet McGrath – Co-Chair
Dawn Langdon - Co-Chair

Goals and Objectives (Long Range):

To establish a mentoring system within NYSFAAA to assist new professionals with their career questions and NYSFAAA participation

Summary of Activities:

The Mentoring Committee lost the key person to retirement this year-Janet McGrath. In the past, this committee has had connections through the Novice training program. Now that Janet has retired, I'm hoping to reassess the committee's goals and long range plans with Executive Counsel

Upcoming Meetings and Events:

N/A

Recommendations:

This committee needs to be revitalized and reconstructed to be more active within NYSFAAA. Discussion with Executive Counsel a necessity.

Submitted by: Dawn Langdon

Date: 10.20.2015



Novice Training

Committee Members:

Lisa Simpson, NYS Higher Education Services Corporation, Co-Chair
Lisa Papke, Genesee Community College, Co-Chair
Heather McDonnell, Emeritus-Sarah Lawrence College, Large Group Leader
Scott Atkinson, The College at Brockport, Large Group Leader
Angela Van Dekker, Fordham University, Large Group Leader
Jim Hanley, NYSHESC, Large Group Leader
Jacque Pascariello, SUNY Stony Brook, Large Group Leader
Ursula Bisconti, Berkeley College, Large Group Leader
Scott Khare, Marist College, Athletic Director
Dan Hunter, Director Emeritus, Buffalo State College, Small Group Leader
Curt Gaume, Retired-Canisius College, Small Group Leader
Renee Pelletier, SUNY Stony Brook, Small Group Leader
Adrienne King, Bank Street College, Small Group Leader
Perry Brown, The College of Westchester, 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
Brian Smith, SUNY Cobleskill, Small Group Leader
Ajana Wilkinson, Kingsboro Community College, Athletic Assistant-Elect
Theresa Weimer, Wagner College, Chair-Elect

Again this year-we had a Large Group Breakout Session that consisted of Veteran Services, Angela Van Dekker, Fordham University, Institutional Methodology, Heather McDonnell, Sarah Lawrence College and Federal Methodology, facilitated by the small group leaders.

Goals and Objectives (Long Range):

This workshop has been primarily designed for financial aid personnel with less than one year of experience. We encourage admissions and enrollment management personnel, as well as others who would like to gain a complete, comprehensive understanding of financial aid administration to enroll.

The program provides six days of intensive training on the administration of financial aid. Training is structured in formal, large group presentations and informal small discussion groups. This gives participants a detailed overview of each topic, followed by the opportunity to discuss special points of interest and to apply their new knowledge through the use of case studies. All participants are strongly encouraged to take advantage of the opportunity for professional growth through group and individual interaction.



Summary of Activities:

The 45th Novice Training was held, for the third year, at Mercy College, Dobbs Ferry Campus from May 30th through June 4th, 2015. We welcomed 88 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. Thank you to the staff members who contributed to these efforts and made Novice 2015 an excellent week.

Participants Evaluation of Workshop

The survey was created through the use of Survey Monkey and e-mailed, on June 8th, 2015 to all 88 attendees of the NYSFAAA Novice Training Workshop. We received 68 responses, for a return rate of 78 percent.

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

The chart below represents the respondents' rating of the session as either ***Excellent or Very Good***.

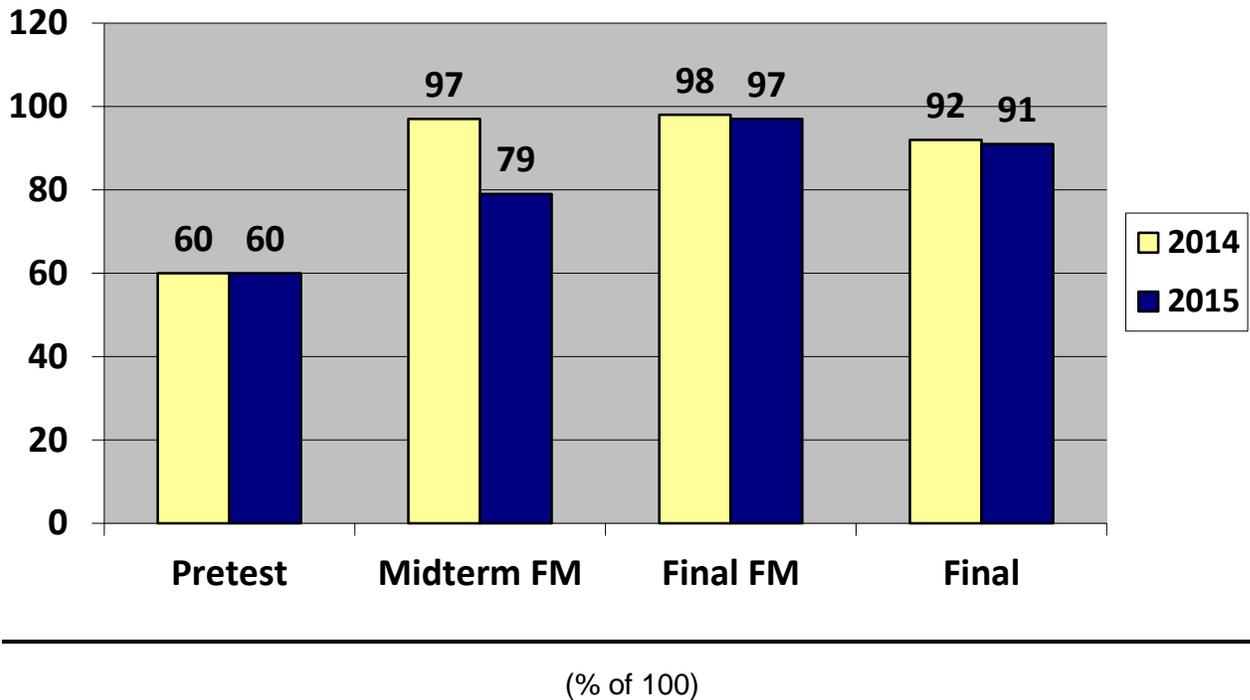
Respondents were asked to rate each of the sessions offered at the workshop. The 68 responses were as follows:

<u>Session</u>	<u>Excellent</u>	<u>Very Good</u>	<u>Total 2015</u>
<i>Counseling</i>	62%	31%	93%
<i>PJ & Verification</i>	29%	31%	60%
<i>Federal Methodology</i>	59%	33%	92%
<i>General Provisions</i>	47%	43%	90%
<i>Title IV Programs</i>	48%	34%	82 %
<i>Packaging & Budgeting</i>	50%	34%	84%
<i>NYS Programs</i>	45%	41%	86%
<i>Federal Loan Programs</i>	28%	31%	59%
<i>Pell Grants</i>	24%	28%	52%
<i>Civil Disobedience</i>	66%	21%	87%
<i>Veteran Services</i>	31%	33%	64%
<i>Institutional Methodology</i>	43%	31%	74%



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



Types of Institution/Affiliation

Private College	45
Public College	22
Proprietary College	7
Other/Non Specified	14
Grad/Professional	0
Lenders	0
Total	88

Regional Breakdown

Region I	5
Region II	6
Region III	17
Region IV	4
Region V	22
Region VI	25
Region VII	5
Region VIII	0
Not Affiliated	4
Total	88

Over Seventy-nine percent of the respondents stated they would recommend novice training to their colleagues. Overall, Novice 2015 was a very successful week and many new contacts and friends were made.



Upcoming Meetings and Events:

We received six site applications for Novice 2016. Lisa Simpson and Theresa Weimer conducted site visits to the top four schools with the lowest bids, to determine the 2016 site. The selections process will be completed later this fall. Theresa Weimer has been appointed the new Novice Chair for 2016 and will do a wonderful job continuing the Novice Experience.

Recommendations:

Evaluations from this year overwhelmingly suggest that the length of the novice training should be shortened. The committee will review the agenda and make any changes as appropriate.

Submitted by: Lisa Simpson & Lisa Papke

Date: 10.20.2015



Scholarship Committee

Committee Members:

Region I: Roseanne Johnson (SUNY Buffalo)
Region II: Scott Atkinson (SUNY Brockport)
Region III: Jackie Darquea (Cayuga Comm. College)
Region IV: Megan Henry (Sage)
Region V: Janice Hilbrink (Pace)
Region VI: Tania Degen (CUNY) retiring – to be replaced by
Antigua Middleton (Monroe) and Randy Changoo (Brooklyn College)
Region VII: Crystal Krudis (Adelphi)
Region VIII: Stacey Hawkins (Clarkson)
Chair: Debra Evans (Adelphi)

Goals and Objectives (Long Range Plan):

Goal: to increase annual fund-raising to cover the cost of annual awards (currently \$7,500)
Objectives: Continue to explore different possible ways to increase annual fund-raising.

Summary of Activities:

In 2014-15 we held the annual basket raffle at the Lake Placid conference, raising \$2,003. Additional donations totaled \$661.50

Upcoming Meetings and Events:

In 2015-16 I plan to arrange a late winter/early conference call meeting to discuss ideas for new ways to raise funds. We will continue to have the basket raffle at the conference as this seems to be a popular event.

Recommendations: Ask Development Committee to work with foundations and vendors to solicit on-going financial support for NYSFAAA Scholarship. Some seem to be under the impression that since the SLATE legislation, they are not permitted to make donations for scholarship. It is my understanding that they are allowed to donate for scholarship.

Submitted by: Debra Evans

Date: 10.2.15



School Outreach and Early Awareness Committee

Committee Members:

LaSonya Griggs

Eugene Rogers

Goals and Objectives (Long Range):

- Facilitate early awareness initiatives for GEARUP cohort
- Offer training geared toward needs of affiliate members such as guidance counselors and college access personnel
- Create promotional videos on various aspects of student aid for guidance counselors to post on their websites or use during financial aid nights to promote and increase FAFSA filing processing and procedures

Summary of Activities:

- Conducted College Goal New York events at 37 sites across the state
- Collaborated with NYSHESC to offer nine guidance counselor workshops in seven regions
- Commenced meetings to discuss and facilitate early awareness programming for new GEARUP program

Upcoming Meetings and Events:

Meeting with CGNY site coordinators to get 2016 FAFSA filing season underway

Meeting with NYSHESC to update CGNY website

Guidance Counselor Workshops will be held during November/December time frames

Recommendations:

Offer incentives and training for affiliate members so that they benefit from their NYSFAAA membership

Submitted By: LaSonya Griggs and Eugene Rogers

Date: 10.21.2015



NYS Government Relations Committee

Committee Members:

Susan Mead, Chairperson

(I recruited members and even used contact information from the Conference, but never got responses to my requests for membership participation.)

Goals and Objectives (Long Range Plan):

1. Continue momentum for TAP reform, including evaluating our White Paper from 2012-2012 and aligning our reform measures with current issues.
2. Work with NYS programs, specifically the opportunity programs and NYS TAP, to determine how Prior Prior Year income information for the federal aid purposes is going to influence NYS aid programs.

Summary of Activities:

1. There were several regional meetings where local legislators were invited and participated in discussions regarding TAP Reform
2. Members of NYSFAAA met with legislators during Student Aid Day in February 2015 to advocate for TAP reform.
3. Certain members of NYSFAAA have been part of an inter-agency task force to discuss TAP reforms with members of NYSED. This is not part of the SGRC, but there should be a sharing of information.
4. Testimony was provided to the NYS Ways and Means Committee and the Higher Education Committee during the NYS budget preparation process to voice concerns regarding the NYS TAP program and the need for reform.

Upcoming Meetings and Events:

There is nothing scheduled as I have a difficult time getting members to join the committee or stay active. I will continue to participate in the TAP Coalition and bring issues from the Coalition to NYSFAAA and from NYSFAAA to the Coalition. This will continue.

Recommendations:

1. Ensure participation in committees – I don't know how to do this, but even when people sign up and I contact them, I rarely get a call back, so the committee has been limited in its ability to move forward.
2. Develop achievable goals and objectives that come from the overall mission and goals and objectives of Executive Council for a period of time.
3. Request 1 person from each region to service on the committee in roles similar to exec council or structure committees with at least 2 co-chairs.

Submitted by: Sue Mead

Date: 10.19.15



Statewide Training Committee

Committee Members:

Howard Leslie, co-chair

Kristina Delbridge, co-chair

Perry Brown

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 8, 2014: R2T4 for Modules in Term-Based Programs (123)
- October 16, 2014: Washington Update: Reauthorization and More (137)
- November 20, 2014: Gainful Employment 2.0 (127)
- January 9, 2015 – Hands on FAFSA Training (110)
- January 22, 2015: FAFSA Update and Introducing the FSA ID-The FSA PIN Replacement (210)
- February 12, 2015: Needs Analysis Statewide Training (160)*
- Feb 26, 2015: Jim Briggs: Verification and Taxes- a focus on all related new 2015-2016 regulations (840)
- March 5, 2014: Verification- Beginner (198)
- March 12, 2015: Are you Ready for the CDL Challenge (87)
- March 19, 2015: Verification- Intermediate (328)
- April 2, 2015: Verification-Advanced (308)
- April 30, 2015: Connecting SAP to Retention (166)
- May 7, 2015: Financial Aid Ethics and Standards of Conduct (307)
- May 14, 2015: Everything you need to know about Gainful Employment Reporting (148)
- June 25, 2015: Ask a FED "goes to NYSFAAA Webinar" (193)
- September 24, 2015: NYS Update and Washington Analysis Webinar (318)
- October 13, 2015: Hip, Hip, BBAY! (145)



Duplicated total of 3,905 people trained during the above period (not including those people who come to the web and view the recordings).

*This was a SWT comes to your regional meeting event. We (your co-chairs) believe it is our job to ensure quality training to the desktop as well as to support the regional efforts. It is the regions, after all, that make NYSFAAA strong. That's where networking, mentoring and volunteerism begins. Our intent is to provide one STW comes to the regional meeting event each season making two per a year. We have already scheduled our two for the 15-16 academic year.

The first is well on its way for November 20th. It will be a double training provided by an FSA trainer. The second will be our annual Jim Briggs and is scheduled for February 26th (we are prepared to convert it into a regular webinar should the weather go bad).

We have a strong conviction and dedication to the regions and have an unshakable belief that these two per year events will bring strength back to the regions thus back to all of NYSFAAA.

Upcoming Meetings and Events:

- November 5, 2015: What's Next with Gainful Employment: Certification, Warning Disclosures, Rate Challenges, and Timing
- November 12, 2015: Strategies for Improving Debt-To-Earnings Rates under the new Gainful Employment Rules aka WHAT SHOULD YOU BE DOING NOW
- November 20, 2015: Federal Statewide Training Event with Zachary Goodwin
- January 28, 2016: Verification # 1
- February 18, 2016: Verification # 2
- February 26, 2016: Statewide Training Event with Jim Briggs
- March 10, 2016: HS Validation
- March 31, 2016: SULA, UEH, LEU, COD/NSLDS
- April 14, 2016: Veteran Affairs
- May 12, 2016: Prior-Prior Year

Recommendations:

We will continue to speak with Executive Council to determine how to ensure that our Webinar trainings do not conflict with the person to person interaction that is so necessary to our profession.

Submitted by: Kristina Delbridge & Howard Leslie

Date: 10.19.2015



Technology, Innovation, and Communication Committee

Committee Members:

Co-Chairs: Lea Nuwer & Heather Adner
Former Co-Chair: Amanda Prescott
Myles Baker, Jr.
Jason Boyd
Randy Changoo
Ideta Daniel
Jannatul Ferdous
Kathleen Flaherty
Megan Kennerknecht
Howard Leslie
Stephen O'Meara
Robert Shaw
Ajana Wilkinson

Goals and Objectives (Long Range Plan):

Effectively advocate and encourage two-way communication, ensuring member inclusion. Support technology needs across all regions and for all committees. Support website development and maintenance. Continue to investigate and incorporate best practices. Serve as caretaker of NYSFAAA's public image via social media.

Summary of Activities:

Supported website, blogging (EmpireChat), and social media platforms (Facebook, Twitter, and LinkedIn). Supported webinar surveys, and other NYSFAAA surveying needs. Investigated new technologies.

Upcoming Meetings and Events:

Conference presence and November conference call

Recommendations:

Seek support of Executive Council in requesting member assistance to keep communication fresh and timely.

Submitted by: Lea Nuwer & Heather Adner

Date: 10.8.2015



Treasurer's Report

Goals and Objectives (Long Range Plan):

1. The Budget Committee needs to continue providing an annual balanced budget for Executive Council consideration prior to the summer retreat.
2. 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.
3. 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.
4. The Professional Development Committee should offer training opportunities in grant identification and grant writing to interested NYSFAAA members.
5. The Development Committee should assist conference committees in finding non-lending vendors to exhibit at our annual conference.
6. The Development Committee should create a list of foundations that share NYSFAAA goals and submit applications to these foundations to request sponsorship.
7. The Development Committee should explore gaining financial support from higher education vendor partners by sponsoring NYSFAAA member training activities.
8. NYSFAAA should establish an investment committee which would report to the Treasurer. This committee would monitor the Association's investments on a quarterly basis. The committee would make recommendations to the executive council if significant changes to the portfolio are deemed prudent.
9. NYSFAAA should see that audits are conducted in a timely manner.
10. The NYSFAAA Executive Council needs to continue to be diligent in the management of the Association's resources in the conducting its business.
11. NYSFAAA should be vigilant to assure that the practices we use to solicit vendor support are consistent with our mission and within all pertinent legal guidelines.

Summary of Activities:

We owe our financial good health to Pat Johnson, Past-Treasurer. Pat brought our records current and correct, and caught us up on audit activity, so that we could proceed with confidence in our fiscal standing and abilities. Everyone involved with financial transactions including but not limited to: regional treasurers, council members and committee chairs, have been very responsive and responsible when requesting, recording, and documenting financial transactions. A special thanks to Adrienne King, for her precise recording and timely submission of membership activity. With Pat's guidance and everyone's careful contributions, it has been very easy to maintain our records. We also have a Treasurer's manual (thanks once again to Pat as well as Cathy Patella and EASFAA). This has been a tremendous resource, especially for those activities that are important, but occur infrequently so the procedure is easy to forget.

Our financial position appears to be stable and consistent. The 13-14 audit review has gone smoothly and we expect to finalize it within the next few weeks. Our budget vs. actual activity is reviewed and discussed regularly. Our return on investments grew last year to 2.4% at year end, however we have experienced a decline in the first two quarters of this year, down to .8% growth as of June. This seems to be on par with investment performance across the U.S.



Our committee activities this year focused on meeting the goals and objectives of NYSFAAA's long range plan. Under the direction of Rob Zasso, the Budget & Finance Committee was able to bring forth a budget to Executive Council that addressed both current needs and future goals. Minimal growth in membership and income sources as well as expanding administrative costs led to a small increase in annual dues. The balanced budget should guide us through a fiscally responsible operating year. We are extremely grateful to have Tami Gilbeaux serving as our Development Chair. She has already begun identifying possible grant opportunities and continues to explore avenues of sponsorship and support. It is a herculean job, so we would like to establish a committee to assist Tami in meeting our extensive development goals. Our scholarship committee is well served under the leadership of Debbie Evans. Recognizing the need for new support of the NYSFAAA scholarship, Debbie and the committee explored the idea of a NYSFAAA cookbook. Their time, creativity and hard work brought it to fruition and the books are in route to Buffalo. It's a great way to support NYS college students and try out new recipes that our colleagues in NYSFAAA enjoy!

Upcoming Meetings and Events:

Several members of executive council will meet with our audit firm, Arcara Zucarelli Lenda & Straka, PC, later this month to review our 13-14 audit and financial statements and transfer the 14-15 audit documents. Following the conference, we hope to solicit interest from NYFSAAA members to become involved with Tami on the development committee. We also intend to develop an investment committee, with hopes to have a meeting in the summer with our investment firm, Morgan Stanley.

Recommendations: None

Submitted By: Kerry L. Lubold, NYSFAAA Treasurer

Date: 10.16.2015



Regional Reports

Region 1 Report

October 2015

1. **MEETINGS Held This Year**

A. March 12, 2015 – Daemen College

Attendees = 11

Topics and Training details: Conference Update, Review of Statewide Training that was held February 12th, HESC Update, Announcement about Novice and Requests for candidates for open regional positions.

B. April 9, 2015 – Hilbert College

Attendees =23

Topics and Training details: Detailed Conference Update, HESC Update, Review of National College Fair that was held at the Buffalo Convention Center, Training topics for future meetings discussed, Push for registrations for Novice, Requests for candidates for Treasure & Exec Council Rep, and Discussed summer outing ideas.

C. May 14, 2015 – Medaille College

Attendees = 24

Topics and Training details: BJ Revill, Director of Financial Aid, University of Rochester, School of Medicine Dentistry gave a presentation on Income Driven Repayment Plans & Public Service Loan Forgiveness.

D. June 26, 2015 Summer Outing

Attendees = 32

Members took a 90 minute Buffalo River History Tour by boat then had lunch at 716 Restaurant.

E. October 1, 2015 – Hilbert College

Attendees = 24

Topics and Training details: Round Table Discussion on Prior-Prior

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

A. Buffalo National College Fair 3/18 – 19. Several volunteers manned a NYSFAAA table to answer questions and give out information.



3. **Treasury update: \$7260.71 as of 10/8/15**

4. **Committee Reports**

None – region is focused on the Annual Conference

5. **Conference news**

Everything is looking good and ready to go. The only problem in programming at the moment is securing a speaker for the Federal Update. Jeff Baker originally agreed to speak but hasn't been confirmed as of late. We're waiting to see if he'll attend, send a replacement, or speak remotely.

Other concerns center on attendance and hotel reservations. Due to contracts with the hotel, we need about 12 more "nights" reserved in our block to fulfill the quota or risk being charged by the hotel. There will be a focus on attracting more colleagues to book rooms. The deadline to book within our block has been extended to October 9th..

Also, attendance registrations are about half of what they were hoped to be at the moment. There is a concern about other trainings that are scheduled near the conference. People may prefer to attend these other webinars or trainings instead of attending the conference. It's been addressed with the professional development committee but needs to be discussed again in the future to make sure conference attendance is maximized.

Entertainment and vendors are all set. Encourage people to visit the vendors and play the "Clue" game in vendor area. If vendors have positive feedback they'll return to conferences which generates revenue. Also, they're looking for 4-5 more vendors if possible. Contact Laura Helmich with suggestions. People volunteering for the registration table will be receiving emails with information soon. Please use "reply all" when answering so everyone can see your time selection. More people are encouraged to volunteer for this, as well. October 15th is the deadline for registration so that food can be ordered, etc. Jeanne was approved for \$150 to create two regional Buffalo baskets for the scholarship raffle.

6. **Upcoming meetings and events**

A. School Counselor Workshops

-November 4, 2015 at UB North Campus

-November 5, 2015 at St. Bonaventure University

B. State Wide Training November 20th - Canisius College

C. Christmas Luncheon tentatively scheduled for second week in December, location TBD

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

It was suggested to Kathy Michalski (our new Exec Council Rep for Region 1) to push for discussions on use of the master calendar for mapping training throughout the year. We acknowledge the tremendous value of the State Wide Trainings, but are concerned about the overlap with other events during the year (such as the annual conference). The planning of the State Wide Trainings cannot happen within a vacuum and needs to take other events in consideration. This is not an attack on Howard and Kristina, but more of push for regions to post events on the master calendar so conflicts do not occur.



Region 2 Report

October 2015

1. Meetings Held This Year

Date and Location: September 26, 2014 at Alfred State, approximately 20 attendees. Topic Discussion on regional meeting set ups for 2014-2015.

Date and Location: October- NYSFAAA Conference at Lake Placid, NY.

Date and Location: November 14, 2014 at SUNY Geneseo, 22 attendees. Topic discussion on 2016 NYSFAAA conference location and creating exploratory committee to consider bid for 2016 including Scott Atkinson, BJ Revill, Chris Vernam, Megan Kennerknecht, and Myles Baker, Jr. State Relations is looking for a co-chair with Sue Mead. SWT February 12, 2015 at Nazareth College from 10am-2pm needs volunteers-BJ Revill, Chris Vernam, and J'Dale Berner volunteered. HESC Update- Lisa Simpson and Lisa Hurley via phone shared residency requests; adjustments for 2015-16 are starting now. Young Farmers Forgiveness Program update. HS Counselor Workshop to be held in Brockport, 85 participants registered so far. HS College Application Week is next week. FAFSA Completion Initiative- in final testing stages- program would notify high school counselors about their students who haven't completed the FAFSA but may be attending college. STEM program- trying to work through kinks in the processing. Gear-Up Contract- \$22.4M for early awareness and readiness for low-income and at risk students. Training: Frank Hollister – Director of Veteran Services – Livingston County, provided overview of benefits available to military veterans and resources to assist students looking for guidance. Additional Business: NYSFAAA Outreach Committee looking for someone to join Jean Rogers and LaSonya Griggs to be part of committee, but not a chair. Also need HS Guidance Counselor Workshop and CGNY contact for Region 2. Need Volunteers for the College Goal NY events on 2/5/2015 at GCC Warsaw Campus and 2/8/2015 at East High School in Rochester, and 2/9/2015 at GCC Dansville Campus.

Date and Location: December 9, 2014 at Finger Lakes Community College, Region 2 Annual Holiday Meeting. Cost to Region 2 members \$10 per person with Region picking up rest of cost. Topic Discussion on membership by Margaret Christian – currently 124 members, 30 haven't renewed yet. Vendor Updates: Wells Fargo, Craig Ader, Collections Restructure program started allowing borrower ability to modify loan terms within certain parameters. PNC Bank, Laura Helmrich, they also are working on a similar program. College Board, Katrina Delgrosso talked about the Profile which goes with the FAFSA and allows schools to get more data on family, assets, including special circumstances. Executive Council Report – Melissa Casselman, SWT event February 12, 2015 at Nazareth College. Email Margaret Christian to register. Suggestion from Cindy Kohlman for a state wide training on Policies and Procedures. Guidance Counselor Workshop Update by Chris Vernam, event went well with over 70 people between sessions. Complaints that sessions were too long-may want to start earlier next year to coincide with high school start times and finish earlier in the day. Discussion about



2016 Conference. Region 2 considering bid and may look at Turning Stone Casino again. Next Meetings: March 20th at Roberts Wesleyan and April 17th at GCC. Topic: Policies and Procedures.

Date and Location: January 2015 – No meeting.

Date and Location: February 12, 2015 – NYSFAAA State Wide Training Event at Nazareth College of Rochester. Approximately 26 attendees.

Date and Location: March 20, 2015 at Roberts Wesleyan College in Chili with 17 attendees. Topic Discussion on regional expense report that Region chair must sign off on form for members looking for reimbursement. Membership report, Margaret Christian, 131 members currently, compared to 140 last year at this time. Still looking for volunteer for Member Outreach person. Executive Council representative update – looking for nominees as Melissa Casselman two year term expiring in October 2015, sending email to Region 2 please respond if interested to BJ Revill for election. Excellent feedback from region members on the February SWT held at Nazareth College. NYSFAAA 2015 Annual Conference update by Laura Worley, will be October 27-29, 2015 at the Buffalo-Niagara Conference Center connected to the Hyatt Regency hotel. Keynote speaker is Bruce Weinstein, “The Ethics Guy”. Training Topic: Public Service Loan Forgiveness by BJ Revill. PowerPoint and materials available on NYSFAAA Region 2 website.

Date and Location: April 17, 2015 at Genesee Community College in Batavia with 16 attendees. Topic Discussion on region updates. Per Membership update by Margaret Christian we have 137 members which include all member types, Associate level, Retiree level, and Member level. Vendor Updates: PNC Bank by Laura Helmrich, PNC will hold two drawings through their PNConCampus.com for (2) \$2,000 scholarships. The drawing will be held in June and December 2015. Entrant does not need to be a borrower to enter. Margaret Christian and Laura Karn nominees for the Executive Council Position beginning October 2015. Training Topic was Policies and Procedures with a PowerPoint presentation given by Cindy Kohlman and Leigh Bove followed by a ‘Best Practices’ session amongst Region 2 members which was well received by all. Brockport provided a great example of how to put together a manual. Lisa Simpson called into meeting and updated Region 2 on the new NYS programs; ‘Get on your Feet’ a grant for Undergraduate students and the NYAims program. Lisa updated the group on Income Verification information at HESC. The next meeting will be September 25th, 2015 at Genesee Community College when the region will set the 2015-2016 region meeting calendar.

Date and Location: September 25, 2015 at Genesee Community College in Batavia with 22 attendees. Last treasurer’s report from the April 17, 2015 meeting there was a balance of \$1477.72. Topic Discussion: we welcomed the election of Margaret Christian as the next Region 2 Executive Council Representative. Margaret will begin her two year term for 2015-2017 at this year’s October 27th NYSFAAA Conference in Buffalo, NY. Margaret has requested to have a volunteer take over her duties as Region 2s membership person when she begins her role as the Exec. Council rep. for Region 2. Region 2 Membership update by Margaret is we currently have 127 members paid for the 2014-15 year. It is too early to provide a number for 2015-16 as registration is open for new members and renewing members. Update for the Intermediate Workshop in Albany on October 15-16 is still open for registration and currently there are only 19 attendees registered. Three volunteers attended the Marketplace Mall College night on Wednesday, October 23, Melissa Casselman, Laura Formella, and Marie Longyear. Approximately 120 families stopped at the table for information. Another College night will be held at Greece Ridge Mall. PPY discussion amongst region members showed this will create



some significant changes at schools to accommodate the earlier FAFSA filing dates. Lisa Simpson called in to give updates for HESC on TAP, rosters, AIMS, Get On Your Feet criteria, PPY concerns.

2 Other Training events that Region was involved in :

College nights at Marketplace Mall on 9/23/2015 and Greece Ridge Mall on 9/24/2015. High School Guidance Counselor Workshop will be held at Nazareth College on November 6, 2015. Each region school to donate folders and prize giveaway such as a coffee mug or t-shirt.

3 Committee Reports – n/a

4 Conference news (If your region is involved in Conference planning)- n/a

5 Upcoming meetings and events :

November 20, 2015 – at Roberts Wesleyan – NYSFAAA SWT event
December 11, 2015 – at FLCC or Culinary Institute – Holiday meeting
February 12, 2016 – at Nazareth College – SWT event
March 11, 2016 – at Rochester Institute of Technology – TBD
April 15, 2016 – at Alfred State – TBD
May (TBD) – combo with Region 1 – Topic PPY?

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

Respectfully Submitted,

**Melissa Casselman
Nazareth College, Region 2 Representative**



Region 3 Report

October 2015

1. MEETINGS Held This Year

Date	Location	Attendees
September 26, 2014	SUNY Oswego	22
November 20, 2014	NY Chiropractic College	19
December 12, 2014	Justin's Grill (Holiday Party)	19
February 12, 2015	LeMoyne College	23
March 13, 2015	Tompkins Cortland Comm. Col.	19
May 1, 2015	Cayuga Community College	12
September 25, 2015	SUNY Oswego	18

Topics and Training details:

The following are items the region discussed and received training on over the past year. Proposed NYSFAAA constitutional amendments, Save Perkins Loan efforts, Gainful Employment Webinar, FSA Conference Review, Needs Analysis (State Wide Training), Cohort Default Rate Analysis and Management Plans, Proposed Federal Budget Bills, Federal Loan Repayment Plans, Prior Prior Year FAFSA Changes, NY State College Aid Program Changes.

2. Other Training events that Region was involved in :

Guidance Counselor workshops: (November 2014) Binghamton, 63 attendees; Syracuse, 100 attendees

College Goal NY: 7 sites hosted within Region 3

High School College Nights: Several financial aid information nights were held throughout the region by individual members.

3. Treasury update: \$6,607.48 (as of September 25, 2015)

4. Committee Reports Support Staff Workshop Committee; working on plans for a spring 2016 workshop.

5. Conference news (If your region is involved in Conference planning) Region 3 has started discussions to host a statewide conference in the near future.

6. Upcoming meetings and events

Future Region Meetings:

November 20th Le Moyne College (Statewide Training)

December 10th TBD

February 26th TBD

March 18th TC3

May 16th CCC

7. Regional comments/Recommendations:

Region 3 has made a recommendation that a database be maintained to record individual members' service to NYSFAAA. Examples of member activity recorded may include: committee membership, regional and statewide offices held, NYSFAAA awards received, as well as other services the member has voluntarily performed on behalf of the association. This information might be collected as part of the membership application.



Region 4 Report

October 2015

1. Meetings Held This Year

- a. November 18, 2014 at Albany Law School. We had 2 guest speakers: Perkins update for COHEAO (Maria Livolsi) and HESC provided an update as well.
- b. February 12, 2015. Regional meeting to view Statewide training together at Excelsior College- we had a regional meeting during lunch. This was our first “well-attended” meeting in a very long time. (roughly 30 in attendance)
- c. May 7, 2015. Guest Speaker Rep. Paul Tonko. 12 attendees including a student from SUNY Albany. Discussion of Perkins funding and his priorities in regard to higher education, particularly as they relate to financial aid and other funding mechanisms which will be considered through Reauthorization.

2. Other Training events that Region was involved in: We assisted with the Novice Training and College Goal Sunday.

3. Treasury update: Our current account balance is \$ 8,926.73.

4. Committee Reports: Membership: 124 total- 34 are Associate, Affiliate, Retired and Life members; 90 are Active members.

5. Conference news (If your region is involved in Conference planning): None.

6. Upcoming meetings and events: November 20 Statewide Training Event at Excelsior College will have a Region IV update component. (If you region has a pressing issues that needs to be brought to the attention of Council):

a. Reminder of New officers as follows:

- Executive Council: Michelle Fountaine, Assistant Director for Financial Aid, SUNY Empire State College
- Chairs: Meredith Tower, Associate Director of Financial Aid, Union College and Nicole Hoyt, Financial Aid Advisor, SUNY Empire State College
- Secretary: Stephanie Stock, Director of Business Development, Sallie Mae
- Treasurer: Randi Moore, Financial Aid Coordinator, Samaritan Hospital School of Nursing
- Non-elected positions:
 - Membership: Rochelle Filler, Assistant Director of Financial Aid, Rensselaer Polytechnic Institute
 - Government Relations: Patrick Zeigler from Wells Fargo

b. We continue to experience a dwindling representation at our meetings. We had to cancel our June meeting due to lack of participation. We will continue to explore how best to encourage participation.

- 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 continue 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

October 2015

1. **MEETINGS Held This Year**

- 1) Date and Location: October 2014, during conference in Lake Placid.
Attendees = about 25
Topics and Training details: Dinner and social gathering and kick-off for year
- 2) Date and Location: February 2015, Berkeley College, White Plains
Attendees: About 25 attendees
Statewide Training on Needs Analysis followed by regional business meeting

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

October 2014: Guidance Counselor Workshop, Marist College
College Goal NY, January and February 2015
New Rochelle HS, New Rochelle
Monroe College, New Rochelle
Dominican College, Orangeburg
Poughkeepsie HS, Poughkeepsie
Lincoln HS, Yonkers

We need a new coordinator for New Rochelle. This site has consistently drawn large numbers of applicants.

3. **Treasury update:** \$10,426.24
4. **Committee Reports**
5. **Conference news** (If your region is involved in Conference planning)
6. **Upcoming meetings and events** Statewide Training on Nov. 20th planned for Berkeley College in White Plains
7. **Regional comments/Recommendations** (If you region has a pressing issues that needs to be brought to the attention of Council) We lost our regional chair in the spring of 2015. Not much has happened since then. I am hopeful that our new chair and exec rep will bring much-needed new energy to the region!



Region 6 Report

October 2015

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: October 10th, 2014 – Region 6 Fall kick off meeting was held at Berkeley College's Midtown Manhattan Campus.

Attendees = ??

Topics and Training details:

- Federal Update by Zachary Goodwin
- State Update by Michael Turner
- Ethics, Prejudice and Professional Judgement by Catherine Boscher-Murphy
- Conflicting Information
- NYSFAAA Statewide and Regional Updates

Date and Location: January 16, 2015 – Region 6 Winter/Holiday Meeting at Mercy College.

Attendees = 33

Topics and Training details:

- How to Properly Appeal your Cohort Default Rate Draft from Soup to Nuts by Clemente LaPietra
- Federal Update by Zachary Goodwin
 - Changes in Gainful Employment
- Region 6 Updates

Date and Location: February 12, 2015 - Region 6 Hybrid – Statewide and Regional Meeting at Berkeley College's Midtown Manhattan Campus

Attendees = 38

Topics and Training details:

- Hands on training: Need Analysis

Date and Location: March 30, 2015 NASFAA in New York at NYU. All regions were invited to attend.

Attendees = ??

Topics and Training details:

- NYU Welcome by Martha J. Kanter, Ed.D; former Under Secretary of Education at ED.
- NASFAA Update – Justing Draeger, President



- Open Discussion

Date and Location: April 24th, 2015 TAP Training at Columbia University.

Attendees = ??

Topics and Training details:

- TAP
- APTS
- New York State Scholarships

Date and Location: June 19th, 2015 - Region 6 & 7 Summer Meeting.

Attendees = ??

Topics and Training details:

- Ask HESC Open Forum- Michael Turner from HESC
- Regional Updates, and Networking
- “The Big Picture”-Overview of FSA Information Systems (NSLDS, COD, New FSA ID process & Q&A) by Zachary Goodwin

2. Other Training events that Region was involved in:

- Two High School Counselor Workshops:
 - Friday, December 5th at Fordham University - Lincoln Center Campus (104 attendees) and
 - Friday, December 12th at SUNY FIT (102 attendees)

3. Treasury update: \$10,842 balance as of the end of September 2015

4. Committee Reports: N/A

5. Conference news (If your region is involved in Conference planning) –

- a. Region 6 is exploring hosting the 2017 NYSFAAA Conference in NYC. Currently we are searching for a venue.

6. Upcoming meetings and events - The reps are planning for the following events:

- a. Region 6 Fall Kick off meeting on October 9, 2015.
- b. November 20th, 2015 - The statewide training
- c. December 11th, 2015 - Holiday Meeting
- d. February 26, 2016 - Statewide training
- e. April 22, 2016 – Regional Meeting
- f. June 10, 2016 - Summer Meeting

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



Region 7 Report

June 2015

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

3/20/15- Suny Farmingdale- 31 attendees

Presentation on processing of VA benefits - Dr. Richard Robitaille, Associate Vice President of Military and Veteran Affairs at Berkeley College-

Updates from the scholarship committee- possible cookbook (with contributions from NYSFAAA members) – Deb Evans

Ex Council-outreach update- Gearup news-

A planning team for summer outing (June 19th) was assigned

Meeting- May 15th- Five town college – 25 attendees

1. Call for nominations for upcoming Region 7 elections
2. HESC update: Mike Turner
3. Plus loan news- Zach Goodwin- US DOE
4. Financial Literacy presentation- Donna Miller- Igrad
5. Follow up on summer outing (will be combined outing with Region 6)..agenda plans to focus on

Upcoming meetings: June 19th

Summer outing- Belmont part (along with Region 6)

11:30- Registration

12:00- 1:00pm- Ask HESC Open Forum- Michael Turner from HESC will be there to answer any questions you have about the new initiatives at HESC, including Grants and Scholarships. Please forward your questions in advance to Angie Esparza- angelica.esparza@stonybrook.edu

1:00-2:00pm- Lunch, Regional Updates, and Networking

2:00- 3:00pm- “The Big Picture” - Overview of FSA Information Systems (NSLDS, COD, New FSA ID process, & Q&A)

Regional news:

Region 7 was a strong presence at a recent advocacy event hosted by Suny Farmingdale. This event was to bring to light legislation that was proposed that would freeze Pell grant amounts for 10 years. All the attendees gave testament on how this would hurt students nationwide and we should do we can to make sure this does not happen.

Region 7 plans to hold elections at some point in late June.



Region 8 Report

October 2015

1. Meetings Held This Year

Date and location:

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

15 attendees

10/21/14 to 10/23/2014 - NYSFAAA Annual Conference in Lake Placid

209 attendees

2/12/15: Regional Meeting and NYSFAAA Statewide Training

19 attendees

Topics and Training details:

Two high school guidance counselor workshops were held in November: one on 11/4/2014 at Clarkson and the other on 11/5/2014 at Paul Smiths College. Stacey Hawkins from Clarkson and Kathy Parker from Canton were Co-Chairs.

This academic year Kerry Lubold (SUNY Plattsburgh) performed 21 high school night visits in primarily Clinton and Essex counties. About 600 students and family members attended these workshops. Carolyn Corcoran (SUNY Potsdam) performed a high school night for in St Lawrence County for 50 attendees, and Susan Jones (SUNY Potsdam) also did one in Franklin County for 29 attendees. Other high school nights were also done across the North Country, but no data is currently available on them.

College Goal NY was again held at Clarkson this year (Pam Nichols). There were 10 families that attended.

SUNY Financial Aid Day was held in January at SUNY Canton in January (Kerrie Cooper).

Kerry Lubold served as a small group leader during Novice training at Mercy College in June.

2. Other Training events that Region was involved in: No other training to report.

Example – CGNY, Guidance Counselor workshop?

3. Treasury update: \$4,374.59 as of 9/17/2015.

4. Committee Reports: After the meeting on 2/12/2015, our Regional Chair (Sue Merchant) accepted a new position and moved to Florida. The Regional Chair position was vacant for most of the spring until Carolyn Corcoran agreed to serve.



- 5. Conference News:** The 46th NYSFAAA Conference was held in Lake Placid, NY which was also the site of our conferences in 1999 and 2006. This was a little different in that for the first time we held all conference sessions in a Conference Center, the Lake Placid Conference Center. The Conference Center opened in 2011 and is attached to the infamous Olympic Center. It also sits right at the bottom of the hill and therefore provides easy access to the Crowne Plaza.

The conference ended up with 217 registrants and 27 vendors. We were a little disappointed at registration numbers but felt it was very successful nevertheless given the membership size of our region. Of the 209 actual attendees, 103 responded to the post-conference survey. That is a 49% response rate which is excellent! Of the attendees, 52.4% rated their experience in Lake Placid as excellent and 42.7% rated it as good for a total of 95.1%.

See the final report for more information.

- 6. Upcoming meetings and events:** The new Regional Chair, Carolyn Corcoran held her first meeting on 9/17/2015.
- 7. Regional comments/recommendations:** Note that even though Region VIII has the smallest membership in the state, we have 3 members on the NYSFAAA Executive Council.