



**NYSFAAA**

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

# **2015-2016 Annual Report**





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## President's Remarks

### NYSFAAA President 2015-16 Annual Report

It has truly been an honor to serve as NYSFAAA this past two years. I believe we accomplished a great deal while there are always many things left to be done. It has been a pleasure to work with the Executive Councils and the membership can be assured the organization is in good hands. 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.

#### **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 Community College  
Kathy Flaherty – Secretary – SUNY Oswego  
Kathy Michalski – Region I Representative – Niagara Community College  
Margaret Christian – Region II Representative – University of Rochester - Medical Center  
LaSonya Griggs – Region III Representative – Tompkins Cortland Community College.  
Michelle Fountaine – Region IV Representative – SUNY Empire State  
Diana Donohue – Region V Representative – Bard College  
Melanie Williams-Bethea – Region VI Representative – Teacher's College, Columbia University  
Amy Thompson – Region VII Representative – St. Joseph's College  
Todd Moravec – Region VIII Representative – SUNY Plattsburgh  
Lisa Simpson – HESC Liaison

#### **2016-17 Executive Council**

Darrin Rooker – President– New York Chiropractic College  
Kerrie Cooper – Past-President – SUNY Canton  
Adrienne King – First Vice-President – Bank Street College of Education  
Howard Leslie – Second Vice-President – Berkeley College  
Robert Zasso – Treasurer – Dutchess County Community College  
Kerry Lubold – Past-Treasurer – SUNY Plattsburgh  
Kelly Kelly – Secretary – Le Moyne College  
Kathy Michalski – Region I– Niagara County Community College  
Margaret Christian – Region II– University of Rochester, School of Dentistry & Medicine



LaSonya Griggs – Region III– Tompkins Cortland Community College  
Michelle Fountaine – Region IV– SUNY Empire State  
Diane Donohue – Region V– Bard College  
Melanie Williams-Bethea – Region VI– Columbia University, Teachers College  
Amy Thompson – Region VII– St. Joseph’s College  
Todd Moravec – Region VIII– SUNY Plattsburgh  
Lisa Simpson – HESC Liaison

### **Communication & Technology**

One of my main goals has been to increase communication of Executive Council activities to the constituency. This still is not where I hoped I would be by now but we have made some headway. I have begun letting regions know when the Executive Council will be in their regions so that they could attend if they wish. I have begun giving a brief State of the Association speech at the beginning of our Statewide Regional Training events. I think this has proven to be very helpful but more is still needed.

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. This committee was realigned under the 2nd Vice President and I know that they have an aggressive plan for the upcoming year to make the website a much more organized and efficient mode of communication. We look forward to supporting them in this important endeavor.

### **Advocacy**

Advocacy is probably what I have spent the most time on this year and is a passion for me. Each year can be different regarding priorities and active issues. This was a very active year for the Perkins Loan Program and on the state side with changes necessary to accommodate PPY. The untiring work done on Perkins advocacy resulted in a two-year extension on the Perkins Loan Program with some modification to the prior legislation. Once again, reauthorization is delayed until the new Congress is in session.

- ✓ I was able to speak to Rep. Elise Stefanik recently to ask about reauthorization and was told that there would be more movement once the new Congress is in place.

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:

- ✓ Sue attended the annual NY Student Alliance Supporting Organization luncheon in Albany sponsored by CICU. This is the organization meeting for the NYSFAA Advocacy Day.



- ✓ We had a successful series of Legislative visits after our Executive Council meeting in February in Albany. Our sole focus this past year was on educating the state legislature on the issues posed by PPY.
  - Two weeks prior to our Advocacy Day visits I received a phone call from Senator LaValle's office with questions on our White Paper from last year! This shows that they really do hang on to these important items. At that time I spoke with his staff about the PPY issue and the need for a change to NYS Statute. They were not aware of the issue at all.
  - At Advocacy Day several Executive Council Representatives visited the offices of 15 different legislators to discuss the need to change the statute and none were aware of the issue. We were told it would be reviewed most likely for the 2017 budget year but they came through approved it in 2016! This proved that advocacy is about education and it truly can work!
  
- ✓ This year we have added an Advocacy 101 session at the NYSFAAA Conference. The goal is to educate membership on how they can advocate to make the most impact.

We look forward to more advocacy in 2016-17!

### **Training and Leadership Development**

Our webinar series continues to be unparalleled. 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. For the 2015-16 academic year held 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.

Novice Training continues to be a flagship event. Theresa Weimer from Wagner College did a fantastic job in her first year as Chair! She and her staff trained 78 new NYSFAAA members.

Elections were held for our new Secretary and 1st Vice President. We look forward to working with Kelly and Adrienne King this year. Our almost new council this year (7 of 8 new regional reps) did a great job working together and I see some very promising leadership opportunities in the future with this group.

### **Out Reach**

NYSFAAA continues to excel in providing Financial Aid Nights and FAFSA Completion events in local high schools and community based organizations across the state. These are becoming even more important to get information out directly to those needing it. These have become more important with the major changes in the FAFSA process for 2017-18 starting this year.

With the expiration of the CACG grant which funded High School Counselor workshops NYSFAAA has been reaching out to local guidance associations to make financial aid training part of their regular meetings. Lisa Simpson has been instrumental in organizing this and has many dates already scheduled. We don't want to skip this critical affiliation and this is a great way to continue it.



Regional reps are working on getting the word out to potential affiliate membership in their regions to help increase membership again in this category. Due to the major changes with PPY and Early FAFSA we are seeing an increase in the number of organizations and schools requesting assistance with financial aid nights and FAFSA completion events and we are making every attempt to do them all.

### Goals and Objectives

- My main goal for 2016-17 is to provide the necessary support for our new President's first year. I found this to be critical in my first year and hope to do the same for Darrin.
- Assist in identifying experienced financial aid professionals for nomination for election for President-Elect and Treasure-Elect
- Continue advocacy efforts with the most important current issues on both the state and federal sides.
- Provide guidance and support to all committees as needed in meeting all goals and objectives.

### Upcoming Meetings and Events

- NYSFAAA Conference 48 in Verona at the Turning Stone Casino
- NYSFAAA Conference 49 in Tarrytown at the Westchester Marriott
- 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. Dates to be announced soon!

### Recommendations

My recommendation to the membership is to continue to become involved and to let new staff members become involved. It is easy to begin on the regional level if you don't feel you are ready for state level service. The future leadership of NYSFAAA is part of all of you. You are ready and don't realize it. Start small and see where it takes you. You will not be disappointed to get involved!

### Conclusion

In conclusion I would like to commend the current officers, regional representatives, and committees on a job well done in the 2015-16 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, Kelly Kelly as Secretary, and Adrienne King as our new 1st Vice President. I know it will continue to be a great team! I would like to also acknowledge the great work of our outgoing 1st Vice-President, Jan Scheutzow, and our outgoing Secretary, Kathy Flaherty. Both have served honorably and it has been wonderful working with them.

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.



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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. Corpe*



## 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 2016-2017 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 2016 awards. Though nominations have been low in number again 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.

We are still trying to find a volunteer 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 2016 NYSFAAA Conference and then the next planned conference call will be in June 2016.

### **Recommendations:**

None

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

**Date:** 10.04.16



## Conference 2016

### 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



## Development Committee

### **Committee Members:**

Tami Gilbeaux Chair (Strategic Business Director-Inceptia)  
LaSonya Griggs (Director of Financial Aid Tompkins Cortland Community College)  
Mary Ellen Chamberlain (Director of Financial Aid Paul Smiths College)  
Max Flint-Morgan (Assistant Director of Undergraduate Scholarships Syracuse University)

### **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.

### **Summary of Activities:**

Met with Executive Council to review previous activity and the following recommendations

1. Do not renew the Foundation Directory online subscription. Opportunities are not available for organizations to secure operational expenses. Additionally, the requests to supplement our scholarship funding have gone unanswered, rejected or are not in alignment with goals of either organizations.
2. Consideration of marketing the online training webinars to other EASF AA States. Those states' members would need to become an official member of NYSFAAA to participate. Our membership and income would increase thereby supporting our development goals.

Exec Council Meeting Discussion: Exec Council will consider income opportunities via webinar training sessions with other area regional and State associations as a method of generating income. Further discussion by Kerrie Cooper and Exec Council members needed. Exec Council to provide additional direction to the Development Committee on next steps.

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

None

### **Recommendations:**

None

**Submitted by:** Tami Gilbeaux

**Date:** 10.10.16



## Elections Committee

### **Committee Members:**

Chair – Darrin Rooker, NYSFAAA President Elect

Region 1 – Lisa Tremem

Region 2 – BJ Revill

Region 3 – Pat Johnson

Region 4 – Kristina Delbridge

Region 5 – Daniel Robinson

Region 6 – Michelle Bolton

Region 7 – Eugene Rogers

Region 8 – Carolyn Corcoran

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

The 2016-17 Committee will be charged with conducting elections for the offices of President-elect and Treasurer-elect. The following goals are suggested for the 2016-17 Election Committee to enhance the election process.

- Establish the 2016-17 NYSFAAA Election Committee shortly after the 2016 conference.
- Committee members should be discussing the upcoming statewide election at regional meetings and start identifying possible candidates.
- Attempts should be made to have a ballot of two candidates for each position, while obtaining representation multiple school sectors and state regions.
- Communications should go out from the state and regional level encouraging an increase in the number of members voting.
- Assist the Regions in any way possible to hold their local officer and Executive Councilpersons elections.

### **Summary of Activities:**

The 2015-16 NYSFAAA Election Committee was charged with conducting elections for the position of 1st Vice President, 2nd Vice President and Secretary. A ballot with candidates was constructed and candidacy statements were distributed. Elections were held via electronic vote. The election results, based on a total of 265 members voting, were as follows:

- 1st Vice President, Adrienne King, Bank Street College of Education
- 2nd Vice President, Howard Leslie, Berkeley College
- Secretary, Kelly H. Kelly, LeMoyne College

Congratulation to all of our new officers.

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

None



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**Recommendations:**

None

**Submitted by:** Darrin Rooker, President Elect

**Date:** 10.4.16



## 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):**

**Summary of Activities:**

**Upcoming Meetings and Events:**

**Recommendations:**

**Submitted by:**

**Date:** 10.13.2014



## Governance and Ethics Committee

### **Committee Members:**

Darrin Rooker, Chair  
Scott Atkinson  
Anne Barton  
Irvin Bodofsky  
Gina Soliz

### **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 prospective. 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:**

The committee completed the annual Assessment of NYSFAAA's Strategic Long Range Plan and reported its findings to the Executive Council. A NYSFAAA Standing Committees survey was added to the assessment process this year, as a tool to determine the strength of each committee's activities, accomplishments and goal creation.

During the year the Governance Committee also provided advisement on a few items the Executive Council referred for review and counsel.

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

The Governance & Ethics Committee will now be reorganized under the new chair of Kerrie Cooper, Past President, who shall set the agenda and tasks for the next cycle.

### **Recommendations:**

The committee recommends that the annual review of the Long Range Plan be posted to the NYSFAAA website for the membership to review. It also recommends that the new NYSFAAA Standing Committees survey be done annually as an additional tool to assess the association's performance.

**Submitted by:** Darrin Rooker

**Date:** 10.8.16



## 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):**

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

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

#### **Recommendations:**

**Submitted by:**

**Date:** 9.30.14



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## **Mentoring Committee**

**Committee Members:**

Janet McGrath – Co-Chair

Dawn Langdon - Co-Chair

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

**Summary of Activities:**

**Upcoming Meetings and Events:**

**Recommendations:**

**Submitted by:**

**Date:** 9.30.14



## Novice Training

### **Committee Members:**

Theresa Weimer  
Ajana Wilkinson  
Lisa Simpson  
Lisa Papke  
Scott Khare  
Scott Atkinson  
La Sonya Griggs  
Perry Brown  
Kerrie Cooper  
Jim Hanley  
Adrienne King  
Kerry Lubold  
Sue Mead  
Renee Pelletier  
BJ Revill  
Dan Robinson  
Brian Smith  
Lucy Villaquiran  
Melanie Williams-Bethea  
Robert Zasso

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

We plan to keep Novice at the same location for 2016-2017. The goal will be approximately 70-75 registrants.

The committee has discussed the possibility of utilizing an electronic version of the manual that registrants received and the options are being discussed with TIC.

In addition, we plan to institute an electronic check-in to allow for a smoother process.

### **Summary of Activities:**

- This year was a year of transition for Novice including, but not limited to change in leadership, location, program and staff.
- Lisa Simpson and Lisa Papke stepped down from Novice leadership and Theresa Weimer and Ajana Wilkinson stepped into their roles. We began using more of a committee structure to accomplish all of the tasks needed and it worked well. Mt. St. Mary's College in Newburgh, NY was the host site for Novice. The schedule was condensed a bit to allow for a more concise schedule and rearrange some of the topics covered.
- A total of 79 registrants participated in the training and were divided into 9 small groups.



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**Upcoming Meetings and Events:**

Planning for 2016-2017 has already started. Periodic discussions will occur amongst the committee regarding various tasks that must be accomplished throughout the year up including post-event evaluation.

**Recommendations:**

None

**Submitted By:** Theresa Weimer

**Date:** 10.6.16



## Scholarship Committee

### **Committee Members:**

Debra Evans, Chair

Regional Membership representatives:

Region 1 – Nicole Griffo

Region 2 – Scott Atkinson

Region 3 – Jackie Darquea

Region 4 – Megan Henry, Lauren Tinger

Region 5 – Janice Hilbrink

Region 6 – Antigua Middleton, Randy Changoo

Region 7 – Crystal Krudis

Region 8 – Stacey Hawkins

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

As the Committee Chair is retiring at the end of June 2017, the committee will be undergoing some restructuring, but will continue to investigate additional and alternative sources of funding for the NYSFAAA Scholarship with the goal of generating sufficient annual income to eliminate the need to use the interest earned on the endowment account.

### **Summary of Activities:**

- During our annual conference call we selected the 5 recipients of the NYSFAAA Scholarship for the 2015-2106 academic year.
- Raffle Baskets and 50/50 at 2015 Conference and sale of NYSFAAA Cookbook at the conference and during the past year at various events (regional meetings, Novice, sales by mail) netted \$5,175

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

There will be a phone conference to determine the recipients of the 2016-2017 Annual NYSFAAA Scholarships and possibly more calls to discuss the change in committee leadership and ideas for other potential fund-raising.

### **Recommendations:**

None

**Submitted by:** Debra Evans

**Date:** 10.7.16



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## School Outreach and Early Awareness Committee

**Committee Members:**

Rachel Barker  
LaSonya Griggs  
Eugene Rogers

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

**Summary of Activities:**

**Upcoming Meetings and Events:**

**Recommendations:**

**Submitted by:**

**Date:** 10.17.2014



## Government Relations Committee

### New York State

#### **Committee Members:**

Susan Mead

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

According to a conversation with Darrin Rooker, he is putting together a task force to look at the white paper from 5 years ago. We are going to look at the issues identified in the white paper, enhance and improve the white paper and choose issues that we will speak to for advocacy day.

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

The main activity was to try and change the NYS law for TAP application purposes. The income information for the TAP Program was a factor of application completion that was part of NYS law. As a result, it was the initiative of the NYS GRC as well members of NYSFAAA and Executive Council to meet with legislators on Advocacy Day and try and convince them to change the application process to mirror the new Early FAFSA process. Rob Zasso and Sue Mead met with an aide from Assemblywoman Glick's office and Kerrie Cooper met with someone from Senator LaValle's office to request a legislative action to change the law. As a result, a joint bill was introduced during the budget process to change the law and it was passed. For the 2017-2018 year, a student completing the TAP process would use the 2015 income information, as what would be required for FAFSA completion.

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

I have spoken to Kerrie Cooper, and she is going to try and get regional reps to get commitment from members in the region willing to participate on the NYS GRC. There is be an emphasis at the conference.

#### **Recommendations:**

None

**Submitted by:** Susan L. Mead

**Date:** 10.10.16



## **Federal**

**Committee Members:**

No active members

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

None

**Summary of Activities:**

Region 8 Statewide Training

**Upcoming Meetings and Events:**

None

**Recommendations:**

None

**Submitted by:**

**Date:** 10.12.16



## Statewide Training Committee

### Committee Members:

Howard Leslie

Kristina Delbridge

Perry Brown

Angela VanDekker

Wendy Rizzo

Brian Smith

Brian (Calvin) Ghanoo

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 24, 2015: Federal and State Update with Barmak Nassirian and Lisa Simpson (120 in attendance)
- October 13, 2015: Hip, Hip, BBAY! (131 in attendance)
- November 5, 2015: What's Next with Gainful Employment: Certification, Warning Disclosures, Rate Challenges, and Timing (179 in attendance)
- November 12, 2015: Strategies for Improving Debt-To-Earnings Rates under the new Gainful Employment Rules aka WHAT SHOULD YOU BE DOING NOW (232 in attendance)
- November 20, 2015: Federal Statewide Training Event with Zachary Goodwin (283 in attendance)
- January 21, 2016: Verification for QA schools with Joellen Soucier (733 in attendance)
- January 28, 2016: Verification # 1, Joellen Soucier (606 in attendance)
- February 18, 2016: Verification # 2, Joellen Soucier (475 in attendance)
- February 26, 2016: Statewide Training Event with Jim Briggs: Verification and Taxes- a focus on all related new 2015-2016 regulations (659 in attendance)
- March 10, 2016: HS Credential Validation, Joellen Soucier (357 in attendance)
- March 31, 2016: NSLDS Verification Issues, Joellen Soucier (534 in attendance)
- April 14, 2016: VA Benefits Training, Richard Robitaille (273 in attendance)



- May 12, 2016: PPY- Early FAFSA Workshop, Misty Parkinson, Wendy Bhagat, David Childress, Wes Butterfield, Lisa Simpson, Michelle Taylor, Karen Walker, Ian Lasics, Tom Dalton, Ian Mortimer, Chris Barto, Priscilla Armsby and Debra Bouabidi (3678 in attendance)
- June 9, 2016: Working with Undocumented Students, Ignacia Rodriguez (140 in attendance)
- \* Total number of duplicated trainees for 15-16 (as of today) 8,400
- \* Most popular Live and group training – PPY

### **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.

- September 21: NASFAA Update with Brett Lief and Justin Draeger

### **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 and Howard Leslie, Co-Chairs

**Date:** 06.22.16



## Technology, Innovation, and Communication Committee

### **Committee Members:**

Myles Baker Jr.  
Jason Boyd  
Randy Changoo  
Ideta Daniel  
Jannatul Ferdous  
Kathy Flaherty  
Megan Kennerknecht  
Howard Leslie  
Stephen O'Meara  
Robert Shaw  
Ajana Wilkinson

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

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

We will be specifically seeking the assistance of Executive Council to request and continue to encourage the various committees and regions to keep their content on the website up-to-date. There is a lack of usage of the NY Buzz, Empire Chat (blog), Committee Minutes & Reports, and Regional information. We will support and encourage these efforts in any way we can. We plan to launch a more modern looking website in early 2017 with approval.

### **Summary of Activities:**

Supported website, blogging (EmpireChat), and social media platforms (Facebook, Twitter, and LinkedIn). Supported webinar surveys, and other NYSFAAA surveying needs. Reviewed similar association websites and working with ATAC to create a more modern looking website that will also support the content desired by those linking to the website. Investigating other options that ATAC has to improve our communication efforts with the website.

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

October meeting to review mock-up for a facelift of the current NYSFAAA website. Follow-up meetings will then be held to review the content of the website and suggest further improvements to the membership.

### **Recommendations:**

None

**Submitted by:** Heather Adner and Lea Nuwer

**Date:** 10.6.16



## Treasurer's Report

### Committee Members:

N/A

### Goals and Objectives (Long Range):

1. The Development Committee will be part of the discussion of revenue opportunities through collaboration with EASF AAA and other possibilities for membership expansion and revenue generation.
2. An Investment Committee is being established to provide oversight of our investment portfolio.
3. The 2015-16 audit has been convened and progress will be monitored for a timely conclusion.
4. The switch of Treasurer-Elect to Treasurer and Treasurer to Past-Treasurer will consume a significant amount of time. All accounts will need to be transferred, administrative accesses as well as banking and credit card authority will be updated, and other roles and processes moved. We have a well-developed and current manual that will help with the transition.

### Summary of Activities:

- Thank you for a great year. Some general updates on activities that occurred this last cycle. NYSFAAAA's service mark (the NYSFAAAA acronym) has been re-registered and published with the USPTO. Our post office box has been re-established as a permanent address for official purpose: PO Box 357, 4736 Onondaga Blvd, Syracuse, NY 13219.
- NYSFAAAA's accounts continue to be in good health. Due to a merger between First Niagara Bank and Key Bank, our primary accounts are being transitioned to Key. The transition should go smoothly and we don't anticipate any issues for future treasurers because Key Bank has presence throughout the state.
- The 2014-15 audit concluded well without any significant findings. Many thanks to all of the regional treasurers for their careful documentation of regional banking activities. Our auditor, Diane Straka, and our senior audit manager, Alicia Breinlinger, both formerly of Arcara, Zucarelli, Lenda & Straka have transitioned to a new firm. Executive Council voted to retain Diane's services as our primary auditor, so our documents have been transferred to Tronconi, Segarra & Associates LLP.
- An ad-hoc investment committee was formed this past winter for the purpose of reviewing our current investments and gathering up-to-date information from our account manager on the health of our accounts. Thank you to those who served: Kerrie Cooper, Tom Dalton, Todd Moravec, Darrin Rooker, Amy Thompson and Rob Zasso. In February we met with Robert Bell from Morgan Stanley who reviewed the history of our investments, current status and recommendations for the immediate future. Robert has handled our accounts for a very long time and we are grateful for the guidance he provides. Part of the discussion involved the opportunity to transition our portfolios to a new investment program that is more indexed based (versus the previous program that focused on mutual funds) and offers us a more balanced



portfolio with greater diversification. That transition occurred this past spring and the portfolios seem to be on a path of stable growth. As we sometimes experience years where balancing the budget relies on dipping into operating funds, Robert also suggested we move \$50,000 from our checking account into short term CD's. Executive Council agreed with this recommendation and once the transition to Key Bank is complete, we will begin the process for establishing those reserves.

- Another recommendation was the establishment of a standing investment committee whose primary role will be to provide regular and meaningful oversight of our investment accounts. This recommendation was brought forth and approved by Executive Council, the committee will be formed shortly.
- Our committee activities this year continued to support the goals and objectives of NYSFAAA and our long range plan.
- The Budget & Finance Committee, under the leadership of Susan Godreau, provided executive council in February 2016 with an estimate of the 16-17 budgetary needs of the organization. This presentation and subsequent discussion was helpful for executive council as a way to evaluate current spending and income as well as anticipate any upcoming issues. Susan was able to bring forth a budget to Executive Council in June 2016 that supports NYSFAAA activities while being mindful of our responsibilities.
- As Development Chair, Tami Gilbeaux dedicated her time in 2015-2016 to researching, identifying and applying for grant opportunities that support our operational costs. Although no grants became available, her efforts are extremely valuable in the conclusions we can make from her research. Mostly it's evident that our activities are important to our profession and our students, but are not the type of activities that are supported by grantors/donors. Also it's clear that we need to explore other avenues of income generation and membership development to grow our organization.
- Our scholarship committee is headed by Debra Evans. Under her leadership and enthusiasm, NYSFAAA now has a cookbook! Debra, her committee, and many helpers worked throughout the year on sales of our NYSFAAA cookbook. This activity has generated a nice income for the scholarship fund, as did the 50/50 and the region baskets at the annual conference. Thank you to everyone for their participation and support, including those who made direct personal donations and contributions made at the CUNY FA conference. A special thank you to Debra for her tireless work towards supporting our students in NYS.



*New York State Financial Aid  
Administrators Association*

**Upcoming Meetings and Events:**

Rob Zasso and I will be meeting in November or December for some training and to officially transition the treasury documents and activities. He's prepped and ready, we will be in great hands with our new Treasurer. Thank you Rob!

**Recommendations:**

None

**Submitted by:** Kerry L. Lubold, NYSFAAA Treasurer

**Date:** 10.04.2016



## Regional Reports

### Region 1 Report

#### 1 MEETINGS HELD THIS YEAR

October 1, 2015 at Hilbert College

Attendees - 24

Topics and Training details:

- Round Table Discussion on PPY
- NYS Standardized Award Letter

November 20, 2015 at Canisius College

Attendees - 20

Topics and Training details:

- “Get on Your Feet” Loan Forgiveness program

December 10, 2015 at Salvatore’s Restaurant

Attendees - 32

Topics and Training details:

- HESC updates

February 26, 2016 at Hilbert College

Attendees - 28

Topics and Training details:

- Support Staff Workshop – in the planning stage

March 24, 2016 at Medaille College

Attendees - 19

Topics and Training details:

- Admissions Counselor Workshop – in the planning stage



April 21, 2016 Joint Meeting Region 2 at GCC

Attendees - 44

Topics and Training details:

- College goal New York

May 19, 2016 at Medaille College

Attendees - 12

Topics and Training details:

- Discussion on how to get more people involved with NYSFAAA and better attendance at meetings

June 23, 2016 Summer outing at Bisons Game

Attendees - 18

Topics and Training details:

- Conference 2015 wrap up

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

- NYSFAAA Statewide Training Webinars – 11/20/15 at Canisius College and 2/26/16 at Hilbert College
- High School Training workshops were held on November 4, 2015 at UB North and November 5, 2015 at St. Bonaventure.

**3 Treasury update:**

Balance as of 5/6/16 was \$7454.59

**4 Committee Reports:**

None

**5 Conference news:**

None

**6 Upcoming meetings and events:**

Next Regional Meeting Regional Meeting on October 6, 2016 at Hilbert College

**7 Regional comments:**

None



## Region 2 Report

### 1. MEETINGS HELD THIS YEAR

Date and Location: September 25, 2015 at Genesee Community College in Batavia

Attendees -22

Topics and Training details:

- 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 2's membership person when she begins her role as the Exec. Council rep. for Region 2. 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.
- 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. 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.
- 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.



Date and Location: November 20, 2015 at Roberts Wesleyan College

Attendees -31

Topics and Training details:

- The training portion of this meeting was the SWT on the Top 20 Verification Frequently Asked Questions and Everything you need to know about Modules.
- We also had a regional meeting following the training and lunch. Margaret Christian, Region 2 Exec Council rep, provided a report from the October council meeting in Buffalo, NY.
- Margaret also provided a Membership report in Deidre Strutz's absence.
- Region 2 currently has 114 members and 32 who have not renewed. Statewide membership for 14-15 was 1319, currently we have 1053 and our goal for 15-16 is 1325. November 15<sup>th</sup> was the cut-off for renewal. If members have not renewed they will no longer receive emails via the listserv. Membership fees were increased by \$10. Going forward, one of the goals for membership is to develop a plan to engage more members and communicate with members more frequently.
- Jane Gilliland also reported feedback on the Intermediate Workshop that was held in Albany.
- The next regional meeting will be held on December 15, 2015. Lunch will be served. To help defray the cost members will be charged \$10 per person. The region will cover the difference.

Date and Location: December 15, 2015 at Finger Lakes Community College

Attendees -21

Topics and Training details:

- Margaret Christian provided a report from the remote Exec Council meeting that was held on December 9, 2015.
- The TICC Committee is looking for volunteers, any and all are welcome!
- The survey results from the Buffalo Conference were not available yet.
- 252 members attended the State-wide Conference. Region 6 will be hosting the 2017 Conference. The Marriott Westchester is the location that will most likely be selected.
- Lisa Simpson provided the HESC update via phone. Some of the main points she presented: PPY, Standardized Award Letter, TAP changes for 16-17 and updates on Get on your Feet program and STEM and AIMS.
- We did not have a formal training at our holiday meeting/lunch, but we had an informal discussion regarding sessions at the FSA Conference that were held in Las Vegas. Members talked about sessions they attended and the highlights from those sessions. The members that were present also discussed the latest information regarding the Perkins loan program.



- The next meeting will be the Jim Briggs SWT to be held February 26, 2016 at Nazareth College. A regional meeting will follow the training.

Date and Location: February 26, 2016-SWT at Roberts Wesleyan College

Attendees -31

Topics and Training details:

- State of the Association Update-Kerrie Cooper
- State-wide Training was presented by Jim Briggs

Date and Location: March 11, 2016 at RIT

Attendees -20

Topics and Training details:

- A brief meeting was held prior to our presentation by Ramon Rodriguez on the “Alpha Effect for Financial Aid Administrators.” This session will provide Financial Aid Professionals (PAF) with powerful knowledge and techniques to effectively deal with Alpha Effect.
- FAP will realize how vivid perceptions directly implement in their mind and heart distorted interpretations of relationships, events and ways of communication. FAP will understand the significance of the Alpha Effect to apply it to their mostly overwhelmed work life through Collaboration Connection activities. By integrating the Alpha Effect Positive Triggers, FAP will be equipped to successfully transform sensitive and disasters outcomes form a pandemonium outcome to a paradise outcome.
- At the end of the presentation, FAP will be encouraged to share their Alpha Effect stories to inspire others by emphasizing how their knowledge, experiences, expertise, behaviors and actions attracted the best to them. This was a very interactive presentation!

Date and Location: April 21, 2016 at GCC (this was a joint Region 1 & 2 meeting)

Attendees -43

Topics and Training details:

- Kerrie Cooper attended this meeting and gave a brief update on happenings with NYSFAAA and EASFAA.
- After regional updates from both regions 1 & 2, a roundtable discussion ensued regarding what campuses are planning to do with Early FAFSA/PPY.



Date and Location: June 2, 2016 at Finger Lakes Gaming and Racetrack

Attendees -14

Topics and Training details:

- We had brief meeting with regional updates followed by a Roundtable discussion on the EASF AAA Conference and what campuses are doing about Perkins for 16-17.
- After regional updates from both regions 1 & 2, a roundtable discussion ensued regarding what campuses are planning to do with Early FAFSA/PPY.

The first meeting for the 16-17 academic year will be on September 23, 2016 at SUNY Geneseo.

New Regional officers for 16-17 are:

Co-chairs: Deidre Strutz from RIT and Megan Kennerknecht from SUNY Geneseo  
Secretary: Jon Heining from SUNY Geneseo  
Treasurer: Nora Bell-Owens from SUNY Brockport

## 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 Treasury update:

Last treasurer's report from the April 17, 2015 meeting there was a balance of \$1477.72. As of June 2, 2016 the regional balance was \$1,950.01 which does not include the revenue sharing check that is expected in August 2016.

## 4 Committee Reports :

None

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

The speakers have been confirmed and contracts have been signed.

- Dr. Guadalupe Quintinella is an Associate Professor at the University of Houston and who presented to NYSFAAAA back in the late 1990's. She tells her story of her struggle with learning English and then goes on to college. She owes her success to a financial aid advisor who didn't give up on her.
- The keynote speaker will be Pam Sherman who writes a weekly column for the Democrat and Chronicle titled, "Urban Outlaw." She encourages engagement and get excited about leadership regardless of your level in the organization.
- Smoking is more contained at Turning Stone since our last conference so the smell should be minimal. Also the HVAC system has been upgraded.



- Adrienne King will be leading the Grad/Professional symposium which will be held from 8am to 11:30am before the conference officially kicks off at noon.

## **6 Upcoming meetings and events**

- September 23, 2016-SUNY Geneseo
- November 18, 2016-RIT SWT
- December 9 or 16, 2016-TBA
- March 17, 2017
- April 7, 2017-Possible joint Region 1 & 2 meeting at GCC
- June 2017-TBA

## **7 Recommendations** None



## **Region 3 Report**

### **1. MEETINGS HELD THIS YEAR**

Date and Location:, 2015,

Attendees -

Topics and Training details:

- T

### **2 Treasury update:**

### **3 Committee Reports**

### **4 Guidance Counselor Workshop**

### **5 Upcoming meetings and events**

### **6 Recommendations**



## Region 4 Report

### 1. MEETINGS HELD THIS YEAR

Date and Location: November 20, 2015 at Excelsior College

Attendees - 34

Topics and Training details:

- We viewed the statewide training together and then had a regional meeting. The regional meeting included a HESC update by Lisa Simpson, a discussion of prior-prior year, a Perkins discussion and legislative update by Maria Livolsi and a discussion of future meetings.

Date and Location: February 20, 2016 at Excelsior College

Attendees - 31

Topics and Training details:

- We had breakfast, viewed Jim Brigg's statewide training together and then had lunch followed by a regional meeting.
- The regional meeting included a HESC update by Lisa Hearley, and we also had Erika Terwilliger attend as a guest and give updates on NYS Ed news.
- During this meeting we took an anonymous survey from attendees regarding convenient locations, topics of interest for future meetings/webinars/trainings, and ideas for a summer social gathering.

#### NOTE:

A regional meeting including a panel of schools who recently went through an audit (both Federal and NY State panelists) was scheduled for 4/22/16 but was later cancelled due to lack of interest/attendees. Also, there was a lack of interest (busy schedules and summer vacations played a part) from the membership in having a summer social gathering.

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

We assisted with College Goal Sundays and SUNY Financial Aid day.

### 3 Treasury update:

\$ 8856.81

### 4 Committee Reports

Membership: 121 Associate, Affiliate, Retired and Life Member; 101 active.

### 5 Conference news

None



## 6 **Upcoming meetings and events**

- November 18 Statewide Training Event at Empire State College.
- We will also have a region IV meeting/update following lunch and we are working on securing other speakers/presenters.

## 7 **Recommendations:**

### Strategic Long Range Plan Goals:

**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.

**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

### 1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: November 20, 2015 at Berkeley College

Attendees - 19

Topics and Training details:

- Statewide training event followed by regional meeting to discuss CGNY, future meetings, encourage regional reps for NYSFAAA, and Exec Council and Treasurer's reports

Date and Location: January 21, 2016 at The Culinary Institute of America

Attendees - 32

Topics and Training details:

- Guest speaker, Lisa Simpson, gave a very informative HESC Update and answered numerous questions regarding standardized award letters and other current hot topics. Discussed CGNY, promoted state-wide training event Feb 26, asked for advice regarding future meeting topics, and Exec Council and Treasurer's reports. Following the meeting we had a delicious lunch at the Ristorante Caterina de' Medici.

Date and Location: February 26, 2016 at Berkeley College

Attendees - 21

Topics and Training details:

- Statewide training event followed by regional meeting to discuss possible June meeting, spoke about regional reps for NYSFAAA committees including new rep for State Government Relations Committee (Kathy Gailor, CIA) and introduced our regional rep for Election Committee (Dan Robinson, Pace), gave Exec Council Report and Treasurer's report.

Date and Location: September 20, 2016 at Region 5 Webinar

Attendees - 32

Topics and Training details:

- Kick-off for 2016-17. Discussed goals of the upcoming year. Announced meeting dates. Encouraged involvement and ways to get involved. Executive Council update and Treasurer's report. Held 3 online votes: subsidize a portion of the dinner cost at regional meeting during the conference (amount over \$20pp not including alcoholic beverages), provide lunch for attendees at 11/18/2016 State Wide Training event, and subsidize a portion of luncheon at the Culinary Institute for the January training/meeting (amount over \$20pp or \$90 for non-members to include cost of membership fee).



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

CGNY events held in Region V included locations in Poughkeepsie, Yonkers, and New Rochelle. Members from region participated in Novice Training at Mt St Mary's.

**3 Treasury update:**

As of September 20, 2016 Region V had a balance of \$10,325.27.

**4 Upcoming meetings and events**

- October 18 – Tuesday during the conference we will hold a dinner meeting for Region V at the Upstate Tavern.
- November 18 – NYSFAAA Statewide Regional Training – Berkeley College, Westchester.
- January 27 – Region meeting at Culinary Institute of America, Hyde Park. HESC/TAP Update from Lisa Simpson and Coat Drive for regional charity.
- February – NYSFAAA Statewide Regional Training – date/location TBD.
- Spring meeting – would like to bring a speaker in. Took a poll during webinar to determine the amount willing to pay toward that event.

**5 Recommendations:**

None



## Region 6 Report

### 1. MEETINGS HELD THIS YEAR

Date and Location: October 9, 2015 kick-off Meeting at Beth Israel School of Nursing

Attendees - 32

Topics and Training details:

- Rules of FA Land': Federal Regulations and the upcoming Negotiated Rule Making, by Jim Gathard
- Unusual Enrollment History (UEH) as reported by the Office of Federal Student Aid (FSA)
- Discussion of what's going on in Financial Aid Offices.

Date and Location: November 20, 2015 SWT at your Region at Mercy College

Attendees -

Topics and Training details:

- PRESENTER: Zachary Goodwin - Student Federal Aid (SFA) Trainer
- Top 20 Most Frequently Asked Verification Questions
- Everything you needed to know about modules but were afraid to ask.

Date and Location: January 15, 2016 at Frames Bowling

Attendees - 22

Topics and Training details:

- Zachary Goodwin from the DOE gave a federal update; which included the changes in the Perkins program, verification policy changes, and future cash management changes. There was plenty of time for Q &A. A discussion on creating a Mentoring program and guidelines were discussed with those interested in participating.

Date and Location: February 26, 2016 at Fordham Law School

Attendees - 130

Topics and Training details:

- Jim Briggs Federal Taxes and Verification

Date and Location: May 6, 2016 at Beth Israel School of Nursing

Attendees - 34

Topics and Training details:

- Financial Aid 101
- Apply to Qualify
- Verification



- C-FLAGS
- Sources of Financial Aid
- Basics of College Costs and Budgeting
- HESC Training
- Effective use of IFAP
- Networking
- Being a valuable resource to your organization
- Mentoring

Date and Location: June 24, 2016 at Beth Israel School of Nursing/Spirit Cruise Lines (Joint meeting with Region 7)

Attendees - 44

Topics and Training details:

- Federal Update: Verification, conflicting information, and Professional Judgment- Zack Goodwin
- HESC Update PPY & The Tap Application- Mike Turner

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

- Guidance Counselor Workshops with HESC
- Several College Goal FAFSA Events city wide
- NASFAA comes to NYSFAAA-April 2016

**3 Treasury update:** Region 6 was selected for the annual NYSFAAA audit. Improved documentation was given as feedback on meeting topics and attendees.  
The closing balance based on the fourth quarter report shows \$1764.44 available

**4 Committee Reports:**

None

**5 Conference news:**

- Site was secured in February 2016. The Westchester Marriott, Tarrytown, NY was selected for the 49th NYSFAAA Conference, October 10-12, 2017.
- Committees have been formed and more information will be sent after the 2016 NYSFAAA Conference.

**6 Upcoming meetings and events:**

- November 18, 2016-SWT Comes to Your Region-Monroe College
- Holiday Meeting-December 2016- TBD
- February 2017-Location TBD

**7 Recommendations**

In person meetings vs. webinars this continues to be a discussion amongst members.  
Need for more networking opportunities.



## Region 7 Report

### 1. MEETINGS HELD THIS YEAR

Date and Location: October 2, 2015 Regional Meeting at St. Joseph's College

Attendees- 20

Topics and Training details:

- Region 7 Survey Results
- Presentation "Incorrect Data Challenge" by Tom Kokis, Director of Student Financial Literacy at Berkeley College

Date and Location: November 20, 2015 State Wide Training at Molloy College

Attendees- 30

Topics and Training details:

- Verification presented by Zachary Goodwin, Training Officer, U.S. Department of Education

Date and Location: December 11, 2015 Regional Holiday Meeting at the Milleridge Inn

Attendees- 22

Topics and Training details:

- Kerrie Cooper, President of NYSFAAA, presented NYSFAAA updates
- Scott Buchanan, courtesy of Sallie Mae, presented a federal government relations update

Date and Location: February 26, 2016 State Wide Training at NYIT

Attendees- 44

Topics and Training details:

- Jim Briggs the Tax Detective



Date and Location: March 4, 2016 Regional Meeting at SUNY Farmingdale

Attendees- 41

Topics and Training details:

- Student Loan Repayment Strategies, presented by Joe Garzillo, Vice President, Sallie Mae Bank
- Post 9/11 Veteran's Education Assistance Act of 2008, presented by Richard Robitaille, Assistant Vice President of Military and Veteran's Affairs, Berkeley College

Date and Location: June 10, 2016 Summer Meeting (Combined with Region 6) at Phillips Beth Israel School of Nursing

Attendees- 10

Topics and Training details:

- Verification, Conflicting Info and PJ presented by Zachary Goodwin, Training Officer, U.S. Department of Education
- HESC Update presented by Michael Turner, Client Relations Manager, HESC

**2. Other trainings:**

- November 6, 2015 HESC Guidance Counselor Workshop at SUNY Farmingdale
- January 12, 2016 CGNY at Paul Schreiber HS Port Washington
- January 27, 2016 CGNY at Elmont HS
- February 11, 2016 CGNY at Wyandanch HS
- February 27, 2016 CGNY at Brentwood HS

**3. Treasury update:**

\$3595.41 as of 9/22/16

**4. Conference news:**

None

**5. Upcoming meetings:**

- September 23, 2016 Regional Meeting at St. Joseph's College
- November 18, 2016 State Wide Training at Hofstra University



**6. Recommendations:**

Two Items of Concern Were Voiced at 9/23/16 Meeting:

- I. NYSFAAA membership: The question about institutional vs. individual membership was once again raised. If we have decided against this, perhaps something can be sent out to the membership explaining the rationale. Also, if institutional membership is not an option ever, perhaps there can be some sort of tiered discounting model implemented for volume (i.e. pay full membership price for the first 5 members from an institution, and then discount members 5-10 by a percentage, members 10-15 by a larger percentage etc.)
- II. Conference Charity: Concern was voiced by a few members that by selecting an outside charity to be the beneficiary of proceeds from a separate raffle basket, that we may be detracting from our own internal scholarship fundraising efforts.



## Region 8 Report

### 1. MEETINGS HELD THIS YEAR

Date and Location: November 20, 2015 Statewide Training and Region VIII Meeting at SUNY Potsdam

Attendees- 20-25

Topics and Training details:

- “Top 20 Most Frequently Asked Verification Questions”
- “Everything You Need to Know About Modules But Are Afraid To Ask”

Date and Location: February 26, 2016 Statewide Training and Region VIII Meeting at SUNY Canton

Attendees- 11

Topics and Training details:

- Networking with muffins and coffee
- NYSFAAA update from Kerrie
- HESC Update, and high school equivalency for TAP
- Statewide training from Jim Briggs
- The Tax Detective
- Region Meeting

Date and Location: May 12, 2016 Statewide Training and Region VIII Meeting at Clarkson University

Attendees- 12, 15

Topics and Training details:

- Exec council update
- EASFAA conference
- NASFAA evaluation of products
- Statewide training from several presenters on Early FAFSA and its impact on enrollment

Date and Location: September 22, 2016 Region VIII Meeting at St. Lawrence University

Attendees- 11

Topics and Training details:

- NYSFAAA goals and objectives were reviewed



### Other Training Details

- Two School Counselor Workshops were held in November. Stacey Hawkins from Clarkson and Kathy Parker from Canton were Co-Chairs. The first occurred on 11/9/2015 at Clarkson University and there were 31 counselors in attendance. The second occurred on 11/10/2015 at SUNY Plattsburgh and there were 20 counselors in attendance.
- Over the winter months, high school nights were conducted at least 37 different high schools across the North Country. At least 1,002 students and families were in attendance at these various locations. Presenters included staff from SUNY Plattsburgh, SUNY Canton, SUNY Potsdam, St. Lawrence, and Clarkson.
- College Goal NY was held on 1/30/16 at Clarkson University. Stacey Hawkins was the site coordinator and we had 12 families we were able to assist. We had a total of 10 Region 8 members assist at the event allowing us to provide one-on-one assistance to the families.
- SUNY Financial Aid Day was held on 2/20/2016 at SUNY Potsdam. Staff was available to help families complete a FAFSA. A total of 17 families and 33 people attended the event.
- Kerry Lubold served as a small group leader during Novice Training at Mount St. Mary's in June.

### 2. **Treasury update:**

\$3,532.49 as of 10/5/2016.

### 3. **Committee Reports:**

We had 51 paid or expected-to-pay members as of 10/5/2016. Carolyn Corcoran stepped down in her temporary role as regional chair and Todd Moravec agreed to serve in this capacity until October 2017. Todd is currently evaluating committee vacancies in the region and will probably start to group several committees together under a single chair in order to reduce the number of regional committee chairs in our small region.

### 4. **Conference news:**

None

### 5. **Upcoming meetings and events:**

The new Regional Chair, Carolyn Corcoran held her first meeting on 9/17/2015.

11/18/16 - NYSFAAA Statewide Training and Region VIII Meeting

Location: SUNY Plattsburgh

Attendees: TBD

Topics and Training: TBD

### 6. **Recommendations:**

None



## **NYSFAAA 2015 CONFERENCE STEERING COMMITTEE NOTES FROM , 2015 MEETING @**

### **PUBLICITY UPDATE**

- P

### **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>

### **TRANSPORTATION UPATE**

- S

### **ENTERTAINMENT UPDATE**

- K

### **VENDOR UPDATE**

- L

### **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

### **TECHNOLOGY**

- B

### **PROGRAM**

- S

### **OTHER/MISCELLANEOUS**

- B



## **NYSFAAA 2015 CONFERENCE STEERING COMMITTEE NOTES FROM , 2015 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
  - K

### **FACILITIES UPDATE**

- C

### **VENDOR UPDATE**

- L

### **PROGRAM UPDATE**

- “

### **PUBLICITY UPDATE**

- P

### **TECHNOLOGY UPDATE**

- N

### **REGISTRATION UPDATE**

- N

### **NEXT MEETING -**

### **SEPTEMBER MEETING DISCUSSION**

1st

### **ASSIGNMENT FOR AUGUST 15<sup>TH</sup> MEETING – Please**



## **NYSFAAA 2015 CONFERENCE STEERING COMMITTEE NOTES FROM , 2015 CONFERENCE CALL MEETING**

### **ENTERTAINMENT**

- L

### **FACILITIES**

- M

### **PROGRAM**

- H

### **PUBLICITY**

- P

### **REGISTRATION**

- We need to make space in Registration area at Conference Center for:
  - Perkins

### **TECHNOLOGY**

- T

### **TRANSPORTATION**

- Shuttle info at BOTH hotel and conference center
  - At

### **VENDOR**

- L

### **MISCELLANEOUS NOTES/COMMENTS**

- K

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



## NYSFAAA Conference Planning Meeting Notes: //15

### On-Site

#### **SINAGE:**

- Ashley
  - Will also need one for best practices, scholarships etc.

#### **CONFERENCE CENTER MONITORS:**

- W

#### **PROGRAM**

- R

#### **ENTERTAINMENT:**

- Drum up business for the Adirondack event?
  - Ashley will look into a local Zumba instructor who may have the insurance – will get us cost (\$5 each max)

#### **VENDORS:**

- 24 signed up so far – goal was 25 so looking good.
  - Announce

#### **TECHNOLOGY:**

- Todd has enough lap tops lined up (has a couple extra)
  - He

#### **PUBLICITY:**

- Denim to fleece – be comfortable
  - Come

#### **REGISTRATION:**

- N



**FACILITIES:**

- Food related
  - All

**TRANSPORTATION:**

- Find
  - In registration packets, in conference center and hotel

**ASIDES:**

- P

