

NYSFAAA Executive Council  
January 31, 2022  
9:00 AM – 3:30 PM  
Remote Zoom Meeting

**Call to Order & Roll Call**

**Adrienne King/Anne Sullivan Polino**

President – Adrienne King  
President - Elect – Patti Donahue  
1<sup>st</sup> VP – Renee Swift  
2<sup>nd</sup> VP – Brian Smith  
Secretary – Anne Sullivan Polino  
Treasurer – Shalena Clary  
Treasurer- Elect – Taylor Kreutter  
Region 1 – Nicole Griffo  
Region 2 – Lucinda Snyder  
Region 3 – Peg Stearns  
Region 4 – Rochelle Filler  
Region 5 – Joseph Weglarz  
Region 6 – Tom Zarkos  
Region 7 – Samantha Silva

There was a quorum and the meeting started at 9:00 AM

**Remote Votes**

**MOTION:** A motion was made and revised after discussion by Brian Smith, seconded by Rochelle Filler that we sign the revised WHOVA contract to cover us until December of 2022

Discussion followed where the following points were made concerning what to including and exclude from the contract based on our 2122 conference needs and the overall impact on this agreement.

A vote was called-the motion passes with 12 in favor, 1 in opposition, and no abstentions.

**MOTION:** A motion was made by Peg Sterns, seconded by Brian Smith that we compose and send a letter to Naveen C. Sha, CPA, President and Chief Executive Officer of Blue Sky Hospitality Solutions that brings to his awareness our concerns about not being refunded our deposit of \$21,450.

There was no discussion. A vote was called-the motion passed with 13 in favor, no oppositions, and no abstentions.

**MOTION:** A motion was made by Thomas Zarkos, seconded by Sonya Stein to accept the new Zoom contract that goes into effect on January 4, 2022.

There was no discussion. A vote was called-the motion passed with 13 in favor, no oppositions and no abstentions.

**MOTION:** A motion was made by Shalena Clary, seconded by Patti Donahue to accept the Minutes as presented.

A vote was called-the motion passes with all in favor.

### **TAP Workgroup Meeting**

A meeting was held January 20, 2022 to review regulations on Declaration of Major specifically for students who enter college with credits earned in high school and the impact on the timeline for declaring a major to ensure that these students remain eligible for TAP. The concept of adding a grace period was discussed.

Patti Donahue asked for a list of Work Group Members. Adrienne to provide.

Renee Swift asked a summary of feedback on this topic. Adrienne addressed the concerns for students who declare a degree on time. Adrienne will share the committee's documents with the Council Members.

### **Contracts: Whova! & Zoom**

Contracts are completed.

Zoom contract includes additional large group needed for Novice.

### **Organizational Chart**

Adrienne reviewed the Organizational Chart with the Council. The chart needs to be updated with correct names for regional council treasurers. Adrienne will also make sure committee names are correct. Please send information to Adrienne for updating.

### **Novice 2022**

Sean Sherwood and Rob Zasso will act as Co-Chairman of Novice and have begun working on putting together the plan for this training. Renee Nunziato will assist with the leadership transition to Sean and Rob.

### **Navient-Email from member.**

Adrienne discussed an email received from a member who has asked NASFAA, EASFAA and NYSFAAA to separate themselves from Navient. The exact request from the member is listed below:

“I'm sure you've all heard and read the news story about Navient being forced by dozens of state attorneys general to cancel nearly two billion dollars in both private and federal loans for predatory lending practices and loan collection procedures described by one AG as “abusive.” This isn't the first time Navient has been found guilty of this type of thing, and I'm at least glad that they have dropped out of federal loan servicing.

This is a black eye to financial aid programs and the profession, motivated purely by greed. Off the top of my head, I don't know if Navient has been a vendor at EASFAA, NJASFAA or NYSFAAA conferences or other events in recent years, or if they've been sponsoring anything we do. But this morning I expressed my thoughts to NASFAA leadership that this should be the last straw, and that NASFAA should completely (and very conspicuously) sever all ties with Navient, and now I ask the same of EASFAA, NJASFAA and NYSFAAA. Their actions have repeatedly violated the ethical standards we have no choice as a profession but to uphold and expect of everyone within our community.

Thank you for your leadership and for the opportunity to express my thoughts”.

Adrienne sent this information to other Financial Aid organizations to ask how they will be handling this request. There was discussion amongst the Councilmembers that we should monitor the situation prior to making a decision.

Adrienne agreed to have Patti follow up with Governance on this issue. (See article in appendix)

<b>President-Elect Report</b>	<b>Patti Donahue</b>
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### **Governance & Ethics**

Patti Donahue indicated that she met with Governance and discussed adding language to conference contracts on cancelation, etc. These changes are in Policy & Procedures on website.

She also reviewed the Diversity, Equity and Inclusion (DEI) statement with Heather McDonald, Darrin Rooker and Scott Atkinson to recommend changes to more assertive, present tense and actionable language. The updated version is on the website. She also added policies and procedures related to DEI back in the Policy and Procedures manual.

DEI was not in the P&P and it is now back.

Patti indicated that she would like an active member from each region to be on the DEI committee and asked that recommendations be send to Adrienne King and the committee chair.

### **Policies & Procedures**

Patti Donahue indicated that she would like to update the website to make the Policies and Procedures page a webpage instead of a PDF for ease of access and worked with the Website Committee on these changes.

### **DEI Award -**

Patti Donahue recommended making the DEI award a memorial award named the Sherwood Johnson Memorial Diversity, Equity and Inclusion Award.

Sherwood was the Financial Aid Director of Brooklyn College and Stonybrook University and a very active member of NYSFAAA including very involved in Region 6.

**MOTION:** A motion was made by Patti Donahue, seconded by Peg Stearns to change the name of the DEI award to the Sherwood Johnson Memorial DEI Award beginning with the next cycle

There was no discussion and the motion passed with all in favor.

Samantha Silva to send Sherwood Johnson’s daughter’s contact information to Patti for notification purposes. Sherwood’s daughter Lindsay Johnson is already on the DEI committee

### **Elections and Nominations Committee**

Patti Donahue indicated that she will meet with Elections and Nominations Committee once she has a representative from Joe Weglarz for the Region 5 representative to the committee. Secretary, First and Second Vice Presidents are up for election.

## Subcommittees

Patti reviewed the full committee representation with the Council. She continues to work on details on the NYSFAAA website. Sean Sherwood is working with Howard Leslie and Lea Nuwer to make updates, as needed.

President-Elect or Past-President will be responsible to keep the website up-to-date. The TICC should have two subcommittees that include the Website Committee and the Social Media Committee. Brian Smith confirmed that these are the only subcommittees of the TICC. Patti and Brian will work on any updates needed to the Policies and Procedures.

This information will be added to the Organizational Chart.

<b>First Vice President's Report</b>	<b>Renee Swift</b>
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### Membership

Membership Numbers

To-date: 1,131

February 2021: 985

February 2020: 1062

Renee Swift reported that she is very pleased with these outcomes given COVID and budget constraints. This demonstrates what we already know – MEMBERSHIP matters.

Membership committee activity:

There have been no committee meetings however Lucy and Renee chatted last week about their goals of updating the application for 2022-23 and for surveying directors about their staff memberships. This survey will take place from the regional representatives (and where there isn't a representative, the message will come from Lucy or Renee).

Random question - how active are your high school counselors in your region with respect to NYSFAAA?

Also, the Committee wants to propose a mid-year proration per the policies and procedures allowing this to happen. Renee went through the lapsed members on MemberClicks and anyone who has not interacted with the website in 2019 and/or 2020 has been flipped to Prospect and their status as Pending. This leaves 137 lapsed members to offer this discount to. Renee's suggestion would be \$35 membership fee and she would send this from my email so she can manage the Ad Hoc invoices. As with her last campaign, she does not expect to have a big response (but hey, you never know).

Tom Zarkos asked if there are patterns evident in the data. Renee indicated that regions have remained relatively stable. She doesn't really see any one region over another growing more than others. Tom wonders if it isn't caused by residual funds from pandemic allowing for increase. Renee also feels that the resurrection of programs like Novice is helping grow membership.

Committee hasn't met (usually held after EC meetings). Lucy and Renee did discuss the change in membership application and survey directors on staff memberships (who can join and suggestions for building membership across staffs).

Renee also asked how active are High School Counselors and received the following responses.

- Region 4 – low activity (maybe one member),
- Region 2 – none come to meetings unless there is a High School Counselor Workshop)
- Region 3 – there are members but very low activity.
- Patti indicated low activity and sighted many counselors are still remote.

Patti Donahue asked if the 137 lapse members might be tied to a billing issue. Shalena Clary agrees that it is an issue and is still getting checks for people who renewed and some who still owe. The question is how do we differentiate between those we allow proration for and those who signed up earlier and still owe fees. The MemberClicks website is not as accommodating as our prior website.

There is a concern that this would become the new norm and not optimal for the organization. Shalena reported that there are 55 members renewed that have not paid. Shalena and Renee will compare lists to determine final count. in January 2022 we brought in \$1,700 in dues.

Councilmembers want to avoid this becoming the new norm and people delay receiving a lower payment.

The discussion will be reviewed when we have more information.

**Mentorship Committee - No report.**

<b>Second Vice President</b>
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<b>Brian Smith</b>
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## **TICC**

Brian congratulations the committee for their work on the community forum and submitted the following report.

## **Technology, Innovation, & Communication Committee**

### **Committee Members:**

Howard Leslie, Lea Nuwer, Sean Sherwood, Sonya Stein, Joli Patel, Tanya Patterson-Stanley, Andrea Damar, Tristia Kayser, Brian Smith, Calette Fagan-Murdock, Diedre Strutz

### **Summary of Activities:**

- Development and launch of Facebook message board
- Development and inadvertent launch of NYSFAAA Community Forum
- Training of Sean Sherwood on website administration
- Website updates

### **Upcoming Projects:**

- Increase social media presence
- Continuous updates to BOT knowledge
- Continued support of SWT
- Continued updates to website

### **Assistance Requested from Executive Council:**

- Continual update of names for committees and regional leadership, minutes, and calendar events

**Future Meetings and Events:** TBA

**Submitted By:** Lea Nuwer & Howard Leslie

**Date:** 1/24/2022

## SWT

Brian submitted the following report on SWT.

### Upcoming Sessions

- Federal and State updates
- Training on new Student Aid Index
- Native American Scholarships in New York

We have the ability to do more than one training a month, if there is a desire.

Training on Public Service Loan Forgiveness through EASF AA with Betsy Mayotte. The Committee is checking budget to see if we can get offer this training. The cost of the training is \$1,500. Per Shalena Clary there is \$4,000 in the budget available.

Taylor Kreutter asked how people liked it and expressed are we not diversifying our training we are providing the same session as other organizations such as EASF AA.

The Committee would like to see an agenda and content from Betsy to help determine need for this training given upcoming changes in this area and other options available in this area and on price.

<b>Treasurer's Report</b>	<b>Shalena Clary/Taylor Kreutter</b>
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Shalena Clary requested sign copies of the Conflict of Interest statements from Councilmembers. Please sign in both places indicated on the form and return to Shalena as soon as possible. These will be sent to the auditors.

Shalena has been working with the auditors on past due reports and provided the status of the following reports:

- Financial Statements and Supplemental Information Reports were completed for June 2019. Shalena will review. An extension was filed.
- They auditors are working on processing 2020 and expect to have final questions in next couple of weeks. An extension was filed.
- The 2021 audit has started and expects to complete by mid-May. Should be completed without an extension

Joe Weglarz asked if we should consider doing an RFP as a matter of standard practice to rotate auditors every five years or so. There was an issue on our end several years ago to get the auditors caught back up. Going forward we should be back on track.

A committee should be formed with a timeline and other requirements for year end reporting. Consideration should be given to past treasurers for leading this committee. Policies & Procedures should be updated with outcomes of this committee.

## NYSFAAA Balances as of 1/30/2022

### Bank Accounts

004 Key Bank Checking	\$232,287.57
006 Key Bank Scholarship	\$33,014
007 Key Bank CD	\$53,029.97
<b>TOTAL</b>	<b>\$318,331.54</b>

### Morgan Stanley

	Current Value		2021 Realized Gains
Reserve Fund	\$ 404,805.27		\$15,697.69
Scholarship	\$ 304,712.13		\$12,023.62
		Total Gains	\$27,721.31

Working to get regional membership share checks out in the next couple of weeks.

### NYSFAAA, Inc.

Budget vs. Actuals: 2021-2022 NYSFAAA Final - FY22 P&L  
July 2021 - June 2022

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
<b>Income</b>				
102 Dues	77,560.00	77,000.00	560.00	100.73 %
103 Passthrough Income	-520.00		-520.00	
104 Training/Workshop/ProfDev	3,780.00	6,415.00	-2,635.00	58.92 %
106 Annual Conference Inc	17,555.00	12,500.00	5,055.00	140.44 %
107 Novice Workshop Inc	0.00	66,000.00	-66,000.00	0.00 %
110 Interest Income	1.38	80.00	-78.62	1.73 %
304 NYSFAAA Scholarship Inc	11,285.00	4,000.00	7,285.00	282.13 %
<b>Total Income</b>	<b>\$109,661.38</b>	<b>\$165,995.00</b>	<b>\$ -56,333.62</b>	<b>66.06 %</b>
<b>GROSS PROFIT</b>	<b>\$109,661.38</b>	<b>\$165,995.00</b>	<b>\$ -56,333.62</b>	<b>66.06 %</b>
<b>Expenses</b>				
501 Executive Council Administration				
501A Revenue Sharing	0.00	11,000.00	-11,000.00	0.00 %
501B Professional Services	4,367.98	11,000.00	-6,632.02	39.71 %
501C General Executive Council		3,700.00	-3,700.00	
501D Executive Council Meetings		7,500.00	-7,500.00	
501E Special Meetings	685.00	9,200.00	-8,515.00	7.45 %
501F Bank Service Charge	2,509.30	850.00	1,659.30	295.21 %
501G Credit Card Fees	19.51	5,000.00	-4,980.49	0.39 %
<b>Total 501 Executive Council Administration</b>	<b>7,581.79</b>	<b>48,250.00</b>	<b>-40,668.21</b>	<b>15.71 %</b>
504 Awards Committee	2,250.15	2,150.00	100.15	104.66 %
507 Communications Committee	1,283.04	1,200.00	83.04	106.92 %
507A Website		13,655.00	-13,655.00	
<b>Total 507 Communications Committee</b>	<b>1,283.04</b>	<b>14,855.00</b>	<b>-13,571.96</b>	<b>8.64 %</b>
509 Mentoring Committee		1,000.00	-1,000.00	
510 Professional Development				
510A Statewide Training	1,500.00	5,500.00	-4,000.00	27.27 %
510F Training/Workshop/PD Expenses	7,000.00	7,000.00	0.00	100.00 %
<b>Total 510 Professional Development</b>	<b>8,500.00</b>	<b>12,500.00</b>	<b>-4,000.00</b>	<b>68.00 %</b>
511 Annual Conference	984.00	12,500.00	-11,516.00	7.87 %
512 Novice Training Exp	728.00	66,000.00	-65,272.00	1.10 %
538 Diversity Committee Expenses		1,140.00	-1,140.00	
700 NYSFAAA Scholarship				
700A Scholarship Committee	6,000.00	7,600.00	-1,600.00	78.95 %
<b>Total 700 NYSFAAA Scholarship</b>	<b>6,000.00</b>	<b>7,600.00</b>	<b>-1,600.00</b>	<b>78.95 %</b>
<b>Total Expenses</b>	<b>\$27,326.98</b>	<b>\$165,995.00</b>	<b>\$ -138,668.02</b>	<b>16.46 %</b>
<b>NET OPERATING INCOME</b>	<b>\$82,334.40</b>	<b>\$0.00</b>	<b>\$82,334.40</b>	<b>0.00%</b>
<b>NET INCOME</b>	<b>\$82,334.40</b>	<b>\$0.00</b>	<b>\$82,334.40</b>	<b>0.00%</b>

Net Income \$82,334,40 – expenses minimal because of remote meetings and conferences. All expenses for conference have been paid.

**MOTION:** A motion was made by Anne Sullivan Polino, seconded by Rochelle Filler to accept the Treasurer's Report.

A vote was called- and the motion passed with 12 in favor, no oppositions and no abstentions.

<b>Conference 2022</b>	<b>Sonya Stein/Stacey Hawkins</b>
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Stacey Hawkins provided a budget update using an estimate of 238 registrants, including retirees and vendors.

Patti Donahue asked how this total compared to the prior conferences for comparison purposes

Stacey indicated that the committee renegotiated some costs and anticipates being above minimum requirement. The committee is waiting for hotel to confirm that they can increase hotel rooms if needed. Stacey also indicated that the budget is at breakeven using high numbers in some categories.

A vote on the budget was tabled until Sonya Stein returns from vacation and will be taken remotely.

<b>Government Relations Committee</b>	<b>Christopher Barto/Donna Gurnett</b>
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### **NYSFAAA State Student Aid Proposals- Talking Points**

Christopher Barto reported to the Council that this is a busy time with group returning to advocacy. He also indicated that he and Donna Gurnett will be attending Region 1 and 7 regional meetings and would like to schedule other regional meetings, if possible.

Christopher shared the final version of the NYSFAAA Advocacy document and asked for feedback. A copy of this document can be found in the Appendix to this report.

Patti Donahue asked about the filing limit for the New York State Get on Your Feet Program and whether or not the state will waive the timeframe for filing with the program due to the pandemic.

**MOTION:** A motion was made by Nicole Griffo, seconded by Patti Donahue to accept the taking points, as written.

There was no discussion and a vote was called. The motion passed with 11 in favor, 0 oppositions and 0 abstentions.

Donna Gurnett discussed plans for appointments on February 2 and 9 with senators and assembly members and indicated that Assemblymember Glick and Senator Staviski would like to have list of attendees . Donna has calls into other assembly and senators for appointments.

Donna also shared the logistics for these meeting, asking participants to come prepared with their comments.

Finally, Christopher indicated that CICU is holding a virtual Advocacy Town Hall event on February 2 , 2022 at 3:00 PM and that he recommended that President King participate. NYSFAAA would have about five minutes to speak during this event.



## HESC Visit

A visit is scheduled for February 14, 2022 with HESC President Dr. Guillermo Linares and Executive Vice President Elsa Magee in an effort to continue quarterly meeting with HESC and share latest advocacy ideas.

Logistics: join a little early. Donna will open the links early. Only 20 to 30 minutes. Be prepared with your comments.

CICU is holding an event on 2/2 – virtual Advocacy Town Hall. This will be Wednesday at 3:00 – 4:00 PM. Christopher would like Adrienne to participate. We would have about 5 minutes to speak.

<b>HESC Update</b>	<b>Lisa Simpson</b>
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Lisa Simpson from HESC provided the following update:



**KATHY HOCHUL**  
Governor

**GUILLERMO LINARES, Ed.D**  
President

## HESC Update

**February 2022**

### 2022-23 Processing Updates

The 2022-23 application for the Tuition Assistance Program (TAP) opened on October 1, 2021.

- HESC was notified about issues applicants experienced with linking to the NYS payment application from the 2022-23 FAFSA confirmation page. The issue seems to be resolved at this time. Students who were unable to link to the NYS Payment Application can apply on the HESC website once their FAFSA application is processed.
- Processing of 2022-23 applications, missing information and application updates is currently underway. However, 2022-23 Student Status Listings (SSL) will not be produced until early Spring 2022.
- Please make sure you provide student ID numbers for your students as schools will not receive any information about the students' accounts without student ID associated with their applications.

In addition, the 2022-23 STEM Scholarship application opened on October 1, 2021.

### 2021-22 Excelsior Processing Updates

- The Spring 2021-22 Excelsior application is open until March 7, 2022. This is for students who are attending college in the 2021-22 academic year.
- Prior Excelsior recipients MUST complete the 2021-22 NYS Payment Application to renew their awards for the 2021-22 academic year.
- Both new and renewing applicants are submitted to NYS Tax & Finance to verify income.

- Income must be successfully verified for students to receive their awards. Awards will not be placed on a manifest if income verification is outstanding. Students will be decertified with a ‘9’ miscellaneous denial if not verified by the end of the academic year.
- Schools can utilize the QGE012-Pending Income Verification Report to capture the population of students who have income verification issues.
- To learn when the 2022-23 Excelsior Scholarship Application period opens, we encourage students to sign up to be notified at [hesc.ny.gov/excelsior](https://hesc.ny.gov/excelsior)

## 2020-2021 Academic Year Closeout

### TAP processing

TAP processing for the 2020-21 academic year, which ended June 30, 2021, is closing.

Please take the following actions to ensure your student's TAP awards are processed.

- Submit all student certification transactions for 2020-21 TAP payment rosters 001-019 before March 7, 2022. Transactions left in a pending status after this date will be decertified by HESC.

To review pending student certifications transactions for the 2020-21 academic year:

- Go to Transaction Processing ≥ select Grants & Scholarships
- Enter ID and password ≥ choose View/Submit Pending Certifications from the left menu of the View Student Record screen.
- Correct certification errors. Accounts with certification errors will also be decertified by HESC if they are left pending due to errors.

To review student certification errors ≥ click on the View/Correct Student Certification link from the left menu of the View Student Record screen.

### Excelsior/ETA

All schools should be reviewing their pending Excelsior/ETA students for 2020. Please process your Excelsior/ETA accounts immediately to ensure they process accurately before we close out the year.

As a reminder, you can find any pending records here. You should certify these immediately and once completed you can certify the spring 2021 term.

**HESC** Transactions Loans G&S DMCS FAFSA/TAP Completion HescPIN General Functions

Student College Reports

**Student Tasks**

- View Student Record
- Student Processing History
- View Rolling History Data
- View Family Member Verification
- View ISIR Information
- Search ISIR Information By Student Name
- View Income Verification Process
- View Student Refund
- Search by Student Name
- Student Record Maintenance
- Student ID Maintenance
- View/Submit Pending Certification
  - View/Submit Pending Excelsior Certification Transactions
  - **View/Submit Pending ETA Certification Transactions**
  - View/Submit Multiple Pending Certifications

**View/Submit Pending Enhanced Tuition Awards Certification Transactions**

Required information is marked with a \*.

\* College Code:

\* Academic Year:

\* Term:

SSN:

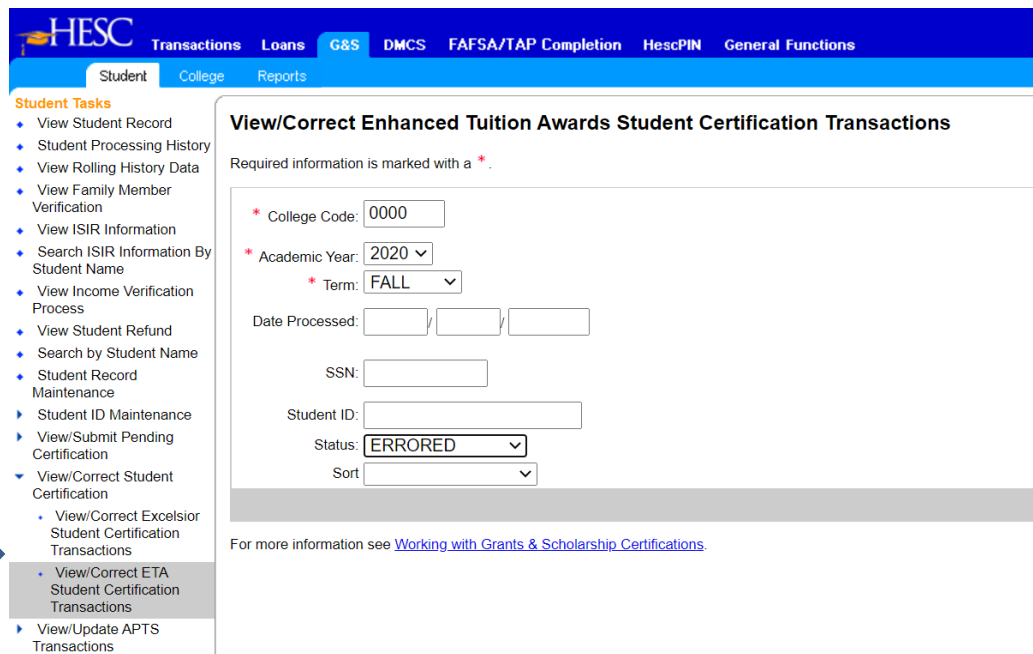
Student ID:

Status: Pending

Sort

For more information see [Working with Grants & Scholarship Certifications](#).

To see any errors for 2020, go here. You should correct and resubmit all error accounts.



You should complete the certification process completed by February 15, 2022.

Excelsior/ETA recipients who were required but failed to file the 2020-21 NYS Payment Application to renew their awards were decertified by HESC with a '9' miscellaneous decertification code. A list of those students was sent to schools to review their credit information and make updates if the student is still on track at the end of the 2020 year. If on track, the school should certify with a '9' and input the credit information so the student is eligible in subsequent year as long as they file the NYS Payment Application by the deadline and meet the qualifications.

### Consolidated Rosters not yet certified from 12/1/21 and earlier

During the week of January 24<sup>th</sup> HESC send pending CSR lists to schools for certification. These CSR's were created prior to 12/1/21 and cross over multiple years. If you received an email, please certify and return these rosters asap for processing.

### 2022-23 College Data Survey is Available on HESCWeb

The 2022-23 College Data Survey is now available on the Web. The survey is used to collect your school's information for New York State grant and scholarship programs; including the Tuition Assistance Program (TAP). The information must be provided by May 31, 2022 and will be used to determine actual awards.

[Access the College Data Survey](#)

TAP Certifying Officers should click on [Secure Transaction Processing](#) and log on to Grants and Scholarships. Then click on the College tab and select either *View/Update College Data or List College Codes by Federal Code*.

### TAP Certifying Officer Requirements

TAP Certifying Officers must view the data displayed on the survey and update the information as needed. This survey may only be updated by TAP Certifying Officers.

TAP Certifying Officers who want to submit data updates via the Web must have Web update authorization.

They may request authorization by contacting HESC's Help Desk at [Collegeupdates@hesc.ny.gov](mailto:Collegeupdates@hesc.ny.gov).

Only those with Web update authorization will be given access to make changes to the survey pages. Other authorized staff will have the ability to view the data within the pages but will not be able to update information.

## Updating Term Information

### Term Tuition and Start/End Dates

This information is required for calculating awards and processing payments. It is important that this information be provided accurately by May 31, 2022, as it is crucial to award determinations and payments. Incorrect tuition or dates could affect award calculations and payments to your institution.

- **If awards for accelerated summer study are available, report tuition charged for "half-time" attendance.**
- **Schools set up on a semester basis must have terms that are at least 15 weeks in duration; Schools set up on a trimester/quarter basis must have terms that are at least 10 weeks in duration.**
  - **Failure to meet these requirements may affect a school's eligibility for NYS financial aid. Questions regarding term length should be directed to the New York State Education Department's Office of College and University Evaluation at (518) 474-1551.**

### Mandatory Fees, Room & Board Allowance and Cost of Attendance

This information is used to calculate or estimate scholarship awards that are not based upon tuition. Enter the appropriate information as follows:

- **Mandatory Fees** - Average fees charged to all students.
- **Room and Board Allowance** - Average cost of room and board charged by the college for a typical student. (If no student housing, leave blank.)
- **Cost of Attendance** - Use Title IV cost of attendance.
- **Term Add/Drop Dates**- This is required for the APTS Program. As with term start dates, the accuracy of this data is crucial to APTS processing.

## Registered Business Schools

The total program tuition at registered business schools must be prorated by term. For example, if the total program tuition is \$6,000 and it takes four terms to complete the program, the term tuition is \$1,500 (\$6,000 divided by four).

Registered business schools must submit a copy of their enrollment agreements for all TAP-eligible programs and a document listing all start and end dates for terms with multiple start dates.

The enrollment agreements must indicate the term length or term structure. Total program tuition and term tuition should also be stated on the enrollment agreements.

College and Term Information must be submitted via the Web by May 31, 2022. If changes to college information are necessary after May 31, 2022, TAP Certifying Officers should send a detailed email to HESC at [Collegeupdates@hesc.ny.gov](mailto:Collegeupdates@hesc.ny.gov). This address may also be used to address any questions concerning the College Data Survey process.

### Update Your School's Contact Information

Contact information may be updated by TAP Certifying Officers at any time when staff changes occur; except for CEO or College president data. HESC strongly encourages TAP Certifying Officers to review their school's contact information and submit changes - especially email addresses - for all staff. This information is particularly important for APTS Coordinators as HESC will be sending automatic notifications of processing deadlines to the email address listed for them. Send your request for changes to CEO or college president data to [Collegeupdates@hesc.ny.gov](mailto:Collegeupdates@hesc.ny.gov).

**Important:** Please remember to notify HESC when staff are no longer authorized to access your college or student data on HESCWeb

### What To Look Out For...

- Nurses for Our Future Scholarship
- Changes to the SSL for 2022-23
- Excelsior/ETA enhancements

### Regional Reports

### Regional Councilpersons

Please see Appendix for Regional Report submitted for inclusion in this report.

### Old Business

Peg Stearns is working on facilitating a letter to Blue Sky Hospitality Solutions to obtain a refund from the 2021 conference hotel.

It was also recommended that Adrienne King send out a message to membership with a rally cry for an in person 2022 conference. It was recommended that Adrienne send a video using the conference theme of "The best views come after the hardest climb".

### New Business

There was no new business discussed.

### Next Meetings

The next two meeting as scheduled for the week of the Monday, April 25<sup>th</sup> from 1:00 – 4:00 PM (remote) and June 13-14<sup>th</sup> Budget Meeting ( in person at the conference location)

### Adjournment

**MOTION:** A motion was made by Patti Donahue, seconded by Tom Zarko to adjourn the meeting

A vote was called-the motion passed with a quorum in favor of the motion

## Appendix

Navient Reaches \$1.85 Billion Settlement With State AGs, Agrees to Cancel Loans for Thousands

By: Owen Daugherty, NASFAA Staff Reporter *Publication Date: 1/14/2022*

Navient — a private student loan company and former federally-contracted servicer for the Department of Education (ED) — reached a settlement Thursday with a group of state attorneys generals to resolve a longstanding lawsuit over allegations that the company engaged in predatory lending practices and “abusive” student loan servicing practices.

As part of the [settlement](#), Navient will provide \$1.7 billion in private student loan cancellation to more than 66,000 borrowers nationwide, in addition to \$95 million in restitution payments to approximately 350,000 federal student loan borrowers.

The \$1.85 billion settlement was touted by the group of state attorneys general as a win for borrowers that will put an end to “deceptive and abusive practices,” according to a statement from Pennsylvania Attorney General Josh Shapiro.

“Today’s settlement corrects Navient’s past behavior ... and puts in place safeguards to ensure this company never preys on student loan borrowers again,” he added.

Navient strongly denied the charges in the lawsuit, saying its decision to settle was to avoid the additional expenses and burden it would require to win the case in court.

“Navient is and has been continually focused on helping student loan borrowers understand and select the right payment options to fit their needs. In fact, we’ve driven up income-driven repayment plan enrollment and driven down default rates, and every year, hundreds of thousands of borrowers we support successfully pay off their student loans,” Navient’s Chief Legal Officer Mark Heleen said in a [statement](#).

Attorneys general from 39 states and the District of Columbia representing both parties were involved in the lawsuit addressing practices surrounding loans that date back more than a decade.

The bulk of the \$1.7 billion in canceled student loan debt will go toward those who took out loans to attend for-profit institutions, including IIT Technical Institute and the Art Institute.

The \$95 million in restitution payments will go to approximately 350,000 borrowers with federal loans who were placed in certain types of long-term forbearances, equaling about \$260 per borrower. Borrowers who are eligible to receive restitution payments as part of the settlement will receive notices in the coming months from the settlement administrator.

Borrowers with federal loans who qualify for relief under the settlement don’t need to take any action if they have a studentaid.gov account with up-to-date information, [according to a site](#) created to inform borrowers of the settlement and terms.

Additionally, Navient will be required to improve its communications with borrowers regarding student loan payment and forgiveness programs such as income-driven repayment (IDR) and Public Service Loan Forgiveness (PSLF).

Under the terms of the settlement, Navient did not admit to any misconduct or wrongdoing.

Navient has faced similar allegations in the past. The Consumer Financial Protection Bureau (CFPB), in a separate [lawsuit brought against Navient](#) in 2017, accused the student loan servicer of “systematically and illegally failing borrowers at every stage of repayment.” Navient vehemently denies any wrongdoing and has [filed a motion](#) to have the case dismissed.

Navient had managed federal student loans on behalf of ED for decades before [announcing earlier this year](#) that it would exit the space and transfer all borrowers it is responsible for to a new servicer.



- **New York State Financial Aid Administrators Association** • [www.nysfaaa.org](http://www.nysfaaa.org)

### DRAFT

#### NYSFAAA State Student Aid Proposals – Student Aid Alliance Advocacy #StandUp4StudentAid – February 2022

The New York State Financial Aid Administrators Association (NYSFAAA), an association of student financial aid professionals from across the state representing all sectors of our diverse higher education system, proposes a number of recommendations designed to safeguard access to an affordable college education for all academically qualified students. Our proposals stem from a need to better serve our state’s students, to help students with demonstrated financial need make college possible, and also focus on streamlining the financial aid application process.

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#### Recommendation #1:

### **Support Meaningful TAP Awards for New York State Students**

– Increase Minimum TAP Award and Expand Income Eligibility –

Just as the maximum award amount was recently increased to \$5,665, we believe an equal \$500 increase in the minimum TAP award, raising it to \$1,000, is long overdue. Expanding access to TAP for more moderate income families is also overdue, NYSFAAA supports phasing in an increase in the TAP income eligibility from

**\$80,000 to \$110,000 NYS Net Taxable Income (NTI)**. Establish a funding formula for future years (post-FY 2023) whereby TAP would be increased annually to keep pace with inflation.

#### Rationale:

*We are grateful to the Legislature for increasing the maximum Tuition Assistance Program (TAP) Award by \$500 starting in the 2021-2022 academic year – the first major increase in TAP award amounts in 20 years. We also support the Governor’s FY 2023 Executive Budget proposal to expand TAP for part-time students in degree programs and community college students enrolled part-time in high-demand*

*workforce credential programs as well as granting incarcerated individuals’ access to TAP. We believe that part-time TAP should also be expanded to all degree-seeking NYS students, including those studying at proprietary colleges.*

We do note, however, that the New York State TAP award schedule has not kept pace with the U.S. inflation rate nor does it adequately address that the significant financial hardships brought upon by the ongoing pandemic for families trying to meet higher education costs. Just as the legislature recognized that the need to raise the TAP award ceiling, we believe that the current TAP award minimum of \$500 needs to be equally adjusted to reflect significant increases in college cost of attendance as well as basic cost of living expense increases over the last 20 years. The TAP maximum income threshold of \$80,000 in NYS Net Taxable Income (NTI) for dependent students has also not been increased in over 20 years. As such, access to TAP for many moderate income families and students has steadily been decreasing. **Senate bill S.1889, that was advanced in the 2019-2020 legislative session, recognized the need to increase the maximum TAP income eligibility level, raising it from \$80,000 NYS Net Taxable Income (NTI) to an NTI of \$95,000.** We urge passage of similar legislation that would phase-in income adjustments to expand access to TAP for students and families with up to \$110,000 NTI.

### **Recommendation #2:**

## **Support Opportunity Programs Serving Our Most Vulnerable Students**

– Enhance Funding for Opportunity Programs –

**To continue to support access and effective programming, we urge the legislature to further increase Opportunity Program funding for:** the Arthur O. Eve Higher Education Opportunity Program (HEOP), Educational Opportunity Program (EOP), College Discovery Program, Search for Education, Elevation, and Knowledge (SEEK) Program, the Collegiate Science and Technology Entry Program (CSTEP), its high school counterpart STEP, and the Liberty Partnerships Program (LPP).

### Rationale:

*We are encouraged that the Governor is proposing a **10% increase** in Opportunity Program funding in the FY 2023 Executive Budget and we urge the Legislature to also support increasing Opportunity*

*Programs' funding for the many deserving students who need it now more than ever.*

The NYS Opportunity Programs have a long and well-established track record of successfully supporting a diverse population of economically and academically disadvantaged students to persevere and complete their programs of study. Opportunity Programs lead to improved graduation rates and are well worth an increasing investment of our tax dollars. The academic, co-curricular, and financial support provided by these programs make a real difference in the lives of students in opportunity programs who are traditionally at higher risk of not graduating.

### **Recommendation #3:**

## **Eliminate Disparity in Access to TAP Awards**

– Standardize Dependent & Independent Student TAP Award Schedules –

**Use the same TAP Award Schedule, income, and maximum award eligibility for all students regardless of their Dependency Status.** Currently independent students who are married or single and have no tax



dependents receive significantly lower TAP awards compared to dependent students and independent students with tax dependents (with a maximum award of \$3,525 compared to \$5,565 for the later group). There is also a significant difference in the maximum income allowed, with eligibility for TAP for independent married students without dependents limited to those below \$40,000 NYS Net Taxable Income (NTI) while eligibility for single independent students without dependents is restricted to those with NTIs no higher than \$10,000. We believe that the current TAP Award eligibility structure disadvantages many independent students and strongly urge you to pass legislation that would fully eliminate award discrepancies based on dependency status alone.

*Rationale:*

In a December 2019 survey of NYSFAAA members, 73% of aid administrators supported treating dependent and independent students similarly, and there is strong sentiment that the current disparity in TAP awards significantly disadvantages independent students who have no dependents. In fact, many aid administrators commented that independent students often have less disposable income available to them than dependent students because they have to provide for all of their own expenses. Certainly, tax dependents and spousal income should be factored into an adjusted NTI calculation to ensure that relevant income and expenses for family members are factored into the determination for aid eligibility; however, the NYSFAAA membership strongly supports elimination of the current separate and unequal TAP Award schedules for independent students.

**Recommendation #4:**

**Support HESC and Expand Use of Professional Judgment (PJ) Authority**

– Fund HESC Initiatives and Provide Greater Flexibility for State Aid Professional Adjustments –

Support the essential work of the Higher Education Services Corporation (HESC):

- Ensure funding to support the revitalization and streamlining of the State Aid application process to help increase the overall number and completion rate of students applying for TAP and other State Grant funds.
- Ensure that eligible students whose loans have been in pandemic forbearance will still be able to apply for the NYS Get on Your Feet Loan Forgiveness Program beyond the normal 2-year application window.
- Empower HESC with greater professional judgment authority and flexibility to assist students with extenuating financial circumstances that could pose a access barrier to college attainment.

*Rationale:*

Financial Aid Administrators (FAAs) are allowed to exercise “Professional Judgment (PJ)” for Federal Title IV programs for defined, well-documented extenuating circumstances, allowing adjustment of aid awards to better reflect significant changes in family circumstances or a student’s and/or family’s ability to pay based on losses to family income. Colleges work with students who have been abused, abandoned, and/or severely neglected by their parent(s) or legal guardian(s), with students who are homeless (or at risk of becoming homeless), as well students who have an incarcerated parent(s). Under current NYS law HESC has very limited provisions for reviewing student “special circumstances.” The disparity between Federal and NY State policy creates frustration, confusion, and discouragement

January 31, 2022

for students facing real hardships. This increased professional judgment authority would give HESC the ability to consider granting independent status (i.e. “Dependency Overrides”), or to revise household income and certain other data elements with appropriate documentation that is similar to Federal guidelines that enable colleges to assist students with unique and difficult circumstances that could otherwise prevent equitable access to higher education and persistence to degree completion.

**Recommendation #5:**

**Continue to Protect Bundy Aid Funding**

**Protect Bundy Aid Funding** – The Governor’s Executive Budget provides level funding for Bundy Aid for state fiscal year 2023, a critically important program to Independent Sector institutions that has been used historically to support direct student aid. At this time, we don’t anticipate that colleges will be receiving any additional COVID-19 related Higher Education Emergency Relief Fund (HEERF) support from the federal government. As such, Bundy Aid funding is essential support to help independent colleges and the students they serve in rebounding financially from this prolonged pandemic. **We urge the Governor and the Legislature to ensure full funding of Bundy Aid in the FY 2023 Budget.**

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## Regional Report Submitted

# Region #1 Report NYSFAAA Exec Council Meeting December 16, 2021

### 1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: December 16,2021 via Zoom

Attendees = 16

Topics and Training details: Treasurer Report, Committee Reports, HESC update, Executive Council Report, February in-person meeting/luncheon, Open Discussion

### 2 Other Training events that Region was involved in : some attendees viewed FSA conference sessions

3 Treasury update: Kathy Michalski \$3,536.85 in account

4 Committee Reports: No committee updates

5 Conference news : N/A

6 Upcoming meetings and events: Next Meeting is February 4<sup>th</sup> via Zoom

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

Submitted: 01/28/2022

Nicole Griffo

Region 2 – There was no Report issued by this region.

Region 3 – There was no Report issued by this region.

**Region IV Report**  
**NYSFAAA Exec Council Meeting**  
**Date 1/31/2022**

**1 MEETINGS SINCE LAST EXEC COUNCIL MEETING**

**Date and Location:** None, had to cancel December meeting due to low attendance

**Attendees:** N/A

**Topics and Training details:** N/A

- 2. **Other Training events that Region was involved in :** FAFSA filing workshops
- 3. **Treasury update:** Andrea Wedler reports account balance of \$7,633.81 We have had no recent expenditures.
- 4. **Committee Reports:** Membership Committee - Stacey Block – Nothing new to update
- 5. **Conference news (If your region is involved in Conference planning)** N/A
- 6. **Upcoming meetings and events:**

Wednesday,	February	9th
Wednesday,	March	9th
Wednesday April 6th		
- 7. **Regional comments/Recommendations** No issues for Executive Council

**Region 5 – There was no report issued by this region**

**Region 6 – There was not report issued by this region.**

# Region 7 Report

## NYSFAAA Exec Council Meeting

### 1/31/22

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

Region 7 was unable to schedule a meeting since the last Executive Council meeting on 12/13/21.

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

Region 7 members were involved in virtual FAFSA completion events (partnered with HESC)

#### **3. Treasury update: (please include Treasurer's Name)**

Per Jeanine Murphy, Region 7 balance is \$4,525.26.

#### **4 Committee Reports**

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

N/A

#### **6. Upcoming meetings and events**

Regional meeting is set for February 8<sup>th</sup>. Chris Barto and Donna Gurnett will be joining to discuss how the region can become involved in advocacy efforts.

Emails have been sent encouraging Region 7 members to attend STW on 2/25.

Last March, Mike Turner was able to provide us with a HESC update. We are going to reach out to him to see his availability for this March.

We are looking for a presenter for a financial wellness topic in April as a way to celebrate Financial Literacy Month.

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

Regional meetings have been a bit challenging over the pandemic with Zoom fatigue since so many wonderful webinars have been offered. We're going to encourage members to attend our virtual regional meetings this Spring (unless we are able to find a school that will be able to host, but that may be challenging given COVID restrictions).

# Region #8 Report

## NYSFAAA Exec Council Meeting

### Date: January 31, 2022

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

**Date and Location:** December 14, 2021; hybrid meeting (in-person held at Lake Placid conference site)

**Attendees = 18**

**Topics and Training details:** Conference site tour; HESC Update from Mike Turner

**Date and Location:** January 20, 2022, virtual

**Attendees = ~15**

**Topics and Training details:** Conference planning: chair updates & budget review

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

3. **Treasury update:** Update provided by Stacey Hawkins on behalf of Nicole Adner – 3,498.07 as of 11/30/2021

4. **Committee Reports from 12/14 meeting:**

a. Membership update: Elyse Relyea has volunteered to be the Region 8 Membership representative

b. Awards Committee: Nicole Adner volunteered to be the Region 8 Award representative

c. Novice update: Courtney Rust provided update regarding Renee stepping down and Novice going virtual in 2022.

d. Statewide Training: Abigail DeCastro provided update on 2022 schedule; reminder that trainings are always recorded and archived if someone misses them; request to forward training topics to Abby

e. TIC & Website: Sonya Stein

f. Diversity Committee: Todd Moravec provided updated on changes to membership and request for related training at 2022 conference

g. EC Update: Sonya Stein provided highlights from December meeting

h. Mike Turner provided HESC update

5. **Conference news (If your region is involved in Conference planning)-**Stacey will be reviewing the 2022 conference budget: we are being conservative with registration numbers until we have a better idea of member's ability to attend.

6. **Upcoming meetings and events:** scheduling monthly meetings with conference chairs; next full regional meeting TBA

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