



## **FASFAA Executive Board**

**2019-2020**

## **End of the Year Board Report**

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## 2019-2020 FASFAA Executive Board

| <b>Elected Officers</b>                               |                   |
|---|-------------------|
| President   | Daniel Barkowitz  |
| President-Elect & Nominations                         | Dameion Lovett    |
| Immediate Past President & Fiscal Concerns            | Wayne Kruger      |
| Vice President of Training                            | Nadine Bailey     |
| Secretary   | Jenny Cun         |
| Treasurer   | Katie Conrad      |
| Treasurer-Elect                                       | Eileen Brzozowski |
| <b>Elected Region Representatives</b>                 |                   |
| Region I  | Shana Gore        |
| Region II   | Nichole Crowley   |
| Region III  | Abigail Troche    |
| Region IV   | Kylie Gross       |
| Region V  | Jessica Ly        |
| <b>Members At Large Appointments</b>                  |                   |
| Annual Conference Chair                               | Karemah Mansalle  |
| Federal and State Legislative Chair                   | Kimberly Lent     |
| Global Issues Chair                                   | Vacant            |
| Vendor/Sponsorship Coordinator                        | Laura Dickerson   |
| Site Selection/Event Coordinator                      | Jeff Daniels      |
| <b>Committee Chair Appointments</b>                   |                   |
| OSFA Liaison  | Louanne Standley  |
| Volunteer Coordinator                                 | Kamia Mwango      |
| Electronic Services Chair                             | Jeremiah McMahon  |
| Communication / Outreach/ Special Initiatives         | Vanesa Alfaro     |
| Financial Literacy / Early Awareness                  | Ilia Cordero      |
| Newsletter  | Chansone Durden   |
| Membership Chair (Local Arrangements)                 | Suzanne Evans     |
| Scholarship /Charity Chair                            | Merrian King      |
| 25+ Year Member Liaison / Leadership Development      | Donna Kolb        |
| Webinars  | Wayne Kruger      |
| Private College (For Profit / Not-for-Profit) Liaison | Kevin McCrary     |
| Graduate/Professional                                 | Sandy Shimp       |
| Vocational-Technical/Clock Hour                       | Teriann Wright    |
| <b>FASFAA Support</b>                                 |                   |
| Bookkeeper  | Gwyn Francis      |

## Daniel Barkowitz – President

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- My mission statement is to help facilitate the growth and sustainment of FASFAA through Opening the Door for our members. As my guiding principle for this year, I have chosen to focus on the following quote from Association Forum:
  - “When an association values differences and creates a welcoming environment – one that is comfortable, inclusive, and empowering – it **opens the door** for innovation, increased participation and an elevated sense of community and belonging for all.”
  - from <https://www.associationforum.org/browse/welcomingenvironment>

### ***Goals***

In 2019-20, we will Help Open the Door to FASFAA to:

- Our Members
  - By ensuring that every committee in our association’s governance includes multiple volunteers from the association (unless prevented by policy or procedure)
  - By providing training opportunities throughout the year that are local, free, and available (including regional workshop and webinars)
  - By providing professional development opportunities for all of our members regardless of their experience (New Aid Officer, Leadership Development, etc)
  - By delivering an exceptional annual conference with learning opportunities for members of many different experience levels
  - By informing our members through newsletters, emails, legislative advocacy outreach, and other ways of information pertinent to their jobs in a timely manner
- Our Students and Parents
  - By establishing a relationship with OSFA and our local area high schools to support FAFSA awareness and completion events
  - By working with FCAN and the LCANs in partnership to encourage financial aid awareness for our families
  - By providing scholarships through the Bonnie Pirkle program to deserving students and sharing the recipients’ stories at our annual conference.
- Our Colleagues in Other Departments
  - By offering sessions at our regional workshops and annual conference which provide opportunities for shared learning

- By considering the development of a high school counselor educational curriculum with “Beyond the FAFSA” content
- Our Sponsors / Vendors (also members) who support our work
  - By ensuring that the concerns of our partners are considered in the planning of our annual conference
  - By providing opportunities and rewarding meaningful conversation with the exhibitors at the conference
  - By working to ensure that the decision-makers are in the room at the FAFSA conference.
  - By working to prevent overlap with GASFAA for future years (2021 and after) by either coordinating our schedules or looking to move our conference to the Fall.
- Our Colleagues who are Not Yet Members
  - By reaching out to schools who are not yet members to invite them to be a part of FASFAA
  - By working on outreach communication from both FASFAA leadership and from higher education leadership in Florida
  - By examining our membership model (individual vs. institutional)

### ***Accomplishments***

Despite the unexpected challenges we have faced this year, we have had an amazing FASFAA year. We have accomplished many of our goals, and have surpassed our expectations for membership growth, involvement, and outreach. Without fail, we have succeeded in “Opening the Door” for FASFAA and I would like to express my personal appreciation and deep gratitude to every volunteer, board and committee member for their exceptional work.

- In partnership with each of you, I have worked to advance the goals above. Particular accomplishments include:
  - FASFAA’s Clock Hour Workshop which was held from October 28-30, 2019 in Altamonte Springs, FL) had a record setting 153 attendees. Of these attendees, 53 were from out of state. This total attendee count was the highest on record. The attendees were thrilled with the material presented and the quality of the workshop. **NASFAA awarded FASFAA their 2020 Gold Star Award** for the nationwide reach of our training effort, and the outreach we made to all clock hour schools in the country.
  - FASFAA held our New and Intermediate Aid Officer Workshop on January 22-24, 2020 in Boca Raton, FL. There were 46 attendees, which was a record high for recent years. 26 of our attendees registered for the New Aid Officer section of the workshop, while 20 registered for the Intermediate Aid Officer portion. Some sessions were held together as a group, while others were in breakout groups. We held a “graduation” at the end of the event, and celebrated those who attended.
  - FASFAA held a statewide Directors of Financial Aid meeting at Valencia College on February 25, 2020 and we had 97 attendees. This historic event brought together Directors (and/or their designee) from public, private not-for-profit and proprietary

institutions for a historic convening. We partnered with ICUF (Independent Colleges and Universities in Florida), the SUS (State University System) Directors of Financial Aid, and COFAD (Council of Financial Aid Directors) from the State Colleges to hold their Spring meetings in conjunction with the state gathering so many Directors who have not attended FASFAA events will be there. In addition, since we did not charge attendees anything other than membership, we gained new members as a result. Finally, we offered our top tier sponsors / partners the opportunity to hold a table at the event.

- FASFAA offered several webinars this year prior to our conference series which were all widely attended. We have maintained a replay library of past webinars which has been extremely helpful for current members.
- FASFAA converted our Annual Conference to a virtual experience due to the COVID-19 Pandemic. We offered a series of more than 16 webinars to FASFAA members, including our Annual Business Meeting and Annual Award Meeting. In addition, we offered Birds of a Feather sessions for our individual sectors, two NASFAA Authorized Events, and fundraising for our selected charity. We have had a record number of attendees at the various webinars (up to 652 registrants for our largest webinar which was open to the general community) and have consistently received excellent reviews for content and presenters. We made use of a free three-month subscription to GoToWebinar which has been a tremendous resource for us.
- Our annual elections were very close and featured a full slate of candidates. The membership has elected Katie Conrad, President-Elect for 2020-21, Sedrick Brinson, VP Training for 2020-2022, Kylie Gross, Treasurer-Elect 2020-21 / Treasurer 2021-22, Chas Hammond, Region II Representative 2020-22, and Kimberly Gloster, Region IV Representative 2020-22. Thank you to all of the candidates who put your name forward. We look forward to your involvement in FASFAA in the coming year.
- We have awarded \$11,750 in Bonnie Pirkle Scholarship Awards this year. The awards were made through the elected officers and scholarship recipients were notified by their institutional representatives.
- We currently have 950 members for 2019-20, which puts us far ahead of membership. Our webinar series has generated a significant number of new members.
- At our Annual Awards Ceremony, we recognized several members of our association with awards.
  - John Snow (UCF, retired) was presented with the Honorary Lifetime Membership Award.
  - Portia Carrion (Osceola Technical College, retiring) and Gerri McCormick (Valencia College, retiring) were presented with the Lifetime Service Recognition Award.
  - David Bartnicki (ED) was presented with the Certificate of Appreciation for his ongoing support of the FASFAA association as he transitions roles at the Department.

- A brand new award was introduced, the Ollicia Anderson Achievement Award, named in memory of Ollicia Anderson (USF Health) and award this year to her family in her memory. The award will be for new financial aid officers with 3 or less years of experience who have already had a significant impact in their office as measured by their peers or manager. The award will come with a scholarship to help offset costs for SASFAA New Aid Officer Workshop or FASFAA's Annual Conference / New Aid Officer Workshop (at the Board's discretion). This year, a contribution was made to Take Stock in Children in Ollicia's memory.
  - President Recognition Awards were made to Nadine Bailey (VP Training), Katie Conrad (Treasurer), Wayne Kruger (Past President and Webinar Chair) and Bill Ayers (Partner Advisory Chair).
- We completed our Memberclicks database upgrade in late January and are seeing a number of enhancements and benefits from the new version.
- Our Fall Regional Workshops were very successful with between 16 and 84 attendees.
- We continued the work with our Partner Advisory Council to understand and respond to partner needs. Because of industry changes, we had a new chair midyear (Bill Ayers from College Ave Student Loans) who held our several partner calls through the Spring.
- Although our annual conference was cancelled, our annual sponsorship remained in great shape due to the partnership of many of our sustaining partners. When we made the decision to cancel the Spring conference due to COVID-19, we reached out to all sponsors asking them to choose one of three options:
  - 13 sponsors chose to cancel their sponsorship commitment for 2019-20
  - 7 sponsors chose to continue their sponsorship to FASFAA in the full amount of their original commitment for 2019-20
  - 5 sponsors chose to reduce their original commitment to FASFAA but remain sponsors for 2019-20.
- We found creative ways to recognize our business partners who remained sponsors this year by featuring them in introductions to our webinars, creating a business partner section of our website, and offering recognition through multiple email outreach efforts.
- Represented FASFAA to our regional and national associations and other professional associations and groups
  - Served on SASFAA Board.
  - Led a SASFAA pre-conference session and two conference sessions.
  - Continued my tenure as Inaugural Chair for NASFAA's CFAA Commission.
  - Worked with FCAN and FPN to support college access and outreach
  - Presented at EmpowerED conference in March.
- Escape the FAFSA - A Virtual Financial Aid Themed Escape Room
  - Partnership with Florida College Access Network and the Florida Prosperity Partnership to create a virtual Financial Aid themed escape room designed to reach high school students and provide education to high school students about how to qualify for aid.

- The theme is “Escape your High School Bedroom” by figuring out how to pay for college.
- Beta version is opening for testing and members were invited to beta testers and “play” the game to gather feedback
- Small cost to individuals and school systems. Profits split between FASFAA, FCAN and FPP

***Recent Activities***

- See above



## Dameion Lovett – President-Elect

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To engage with colleagues and friends professionally and exchange information to improve our industry and our association

### ***Goals***

- Learn from others, network, and obtain leadership skills for presidency next year.
- Oversee elections committee to provide viable candidates for office next year.
- Finish establishing 2021 board.
- Assign task and duties to work groups, board members and committee chairs to meet the overall goals of the organization
- 

### ***Accomplishments***

- Received candidates to run for office for next year's elections.
- Attended North Carolina ASFA conference in November 2019 as part of the SASFAA President's Swap.
- Attended the NASFAA Legislative & Leadership Expo in Washington DC in February 2020.
- The working theme for next year's board is "See the Possibilities, Expand your Horizons."
- Unveiled conference theme for 2021: "Sharing the Vision, Shaping the Future." Conference logo will be presented at the transition meeting.
- 2020-2021 conference charity is the Community Foundation of South Lake. The mission of the Community Foundation of South Lake County is "Serving our community through the connecting of resources and intentional philanthropic giving." 2020-21 Charity Chair Merrian King and FASFAA will be raising funds to help provide a scholarship to a college bound recipient identified through the foundation's DREAM Initiative. DREAM students have all of the resources, support and services necessary for success, the Foundation decided to focus on 20 students living in South Lake County, mainly in the 34711 zip code. This zip code showed to have the highest occurrence of single parents living under the poverty line.
- FASFAA will also be securing donation of school supplies for Mascotte Charter School in Mascotte, FL to help support the Community Foundation of South Lake. The following items will be collected:
  - Lined paper, copy paper, construction paper, spiral notebooks, composition books, index cards

- Blue or black pens, #2 pencils, colored pencils, erasers, pencil sharpener, pencil case, colored markers, crayons, highlighters, dry-erase markers
- 3-ring 2" binders, pocket folders, report covers
- Staplers, staples, rulers, protractors, glue sticks, scissors, tape
- Tissues, sanitizing wipes, hand sanitizer

### ***Recent Activities***

- Oversaw nominations committee, which provided the slate of candidates for elections.
- Attended NASFAA Legislative and Leadership Expo in Washington, D.C. participating in the Association Management Pathway.
- Attended SASFAA Annual Conference in Norfolk, VA.
  - Co-presented a session on financial literacy.
  - Participated in the president-elect workshop.
- Held two conference calls in order to assemble a committee to provide more financial aid training to high school guidance/career/college counselors. Early Awareness Chair Lent (supported by her role at the Florida College Access Network) will lead this committee. Other members:
  - Ansberto Vallejo, Guidance Services Director, School District of Hillsborough County
  - Ilia Cordero, Director of Financial Aid, Valencia College
  - Kathleen McDonald, Florida College Access Network
  - Becky Gilmore, Communnality Foundation of Tampa Bay
  - Pedro Hernandez, Florida Department of Education
  - Laverne Handfield, Florida College Access Network
  - Amy Gallaher, Community Foundation of Pasco
  - Steve Rios, Positive Pathways/Florida Reach (Foster Children)
  - Becky Schumacher, Florida High School Counselors Association

## Wayne Kruger – Immediate Past-President/Fiscal Concerns- Chair/Parliamentarian/Webinars

Executive Board Report  
End of the Year, June 2020

### **Why am I here?**

- To promote financial aid via advocacy, education, and professionalism. To give back to the association and to grow our profession so that we may help students and society better.

### **Goals :**

- Have at least 8 webinars for the year
- Move our webinars to recorded YouTube Channel
- Assist with the past president council
- Assist with review of budget and finance

### **Accomplishments:**

Served on the Past Presidents council

Agreed to serve out the term of past president of the association

Well surpassed webinar goal for the year.

Moved our old webinars to a new FASFAA YouTube channel and posted it to our web behind the login.

### **Completed webinars to date:**

- June 9, 2020 - Robert Weinerman - [2019, 2020 and COVID-19 Tax Issues for Financial Aid Officers - handout](#)
- June 4, 2020 - FASFAA Leadership - [FASFAA Annual Awards Ceremony and Celebration](#)
- June 2, 2020 - David Bartnicki - [Basics of Determining Academic Calendars \(Standard, Non-Standard, and Non-Term\)](#)
- May 27, 2020 - FASFAA Leadership - [FASFAA Business Meeting video replay](#)
- May 21, 2020 - David Bartnicki - [Administering Adds, Drops and Withdrawals -](#)
- May 20, 2020 - Wayne Kruger and Francisco Valines - [Moving Operations Remotely in a Time of Crisis](#)
- May 15, 2020 - Trudy Plunkett and David Bartnicki - [A Clock Hour Overview and Discussion - handout](#)
- May 14, 2020 - Patti Corjay and Laura Dickerson - [How America Pays for Grad School - handout](#)

- May 5, 2020 - Dameion Lovett - [Integrating Financial Literacy into Financial Aid Office Services](#)
- April 30, 2020 - Dr. Douglass Lobo - [Maintaining Mental Health and Managing Anxiety During a Global Pandemic](#)
- April 28, 2020 - Robert Weinerman - [The 2018 Tax Return and the Tax Code - What You Need to Know](#)
- April 17, 2020 - Michael Bennett, Francisco Valines and a panel of FASFAA Financial Aid Directors - [Spending the CARES Emergency Grant Funds: Best Practices and Open Forum](#)
- April 3, 2020 - Ahn Tran Do - [Understanding Foreign and Other U.S. Territories Tax Returns](#)
- February 19, 2020 - David Bartnicki, Ellen Gomes - [Standard Terms. What's Changed?](#)
- November 7, 2019 - Kimberly Lent and Ron Gambill - [Legislative Affairs and Advocacy Opportunities](#)
- October 10, 2019 - Teriann Wright and Kimberly Phillips - [Clock Hour 101](#)
- August 8, 2019 - Kristopher Hatcher - [Completing the FISAP and Applying For Campus Based Funds](#)

**Upcoming Webinars:**

- June 11, 2020 - Rachel Allen - FASFAA Conference Keynote Speech: [Waking Up to Our Shared Humanity: Conversations on Inclusiveness](#)
- June 18, 2020 - Dana Kelly - [NASFAA Authorized Event: Cash Management \(\\$30 charge; limited to first 50 registrants\)](#)
- June 18, 2020 - FASFAA Member Facilitators - FASFAA "Birds of a Feather" Sessions - [Clock Hour Schools](#), [Grad/Professional Colleges](#), [Private Not-For-Profit and For-Profit Schools](#), [State Colleges](#), [State University System](#)
- June 25, 2020 - David Bartnicki - [Federal Update](#)
- June 29, 2020 - Anthony Abraham Jack (author of *The Privileged Poor*) with introductions from Justin Draeger, NASFAA CEO - [FASFAA Year End Celebration](#)

## Nadine Bailey – Vice President of Training

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To ensure that FASFAA members have access to training resources.
- To provide support to the Region Representatives in their trainings and workshops.
- To support the Clock Hour and New Aid Officer Chair for any trainings they may provide during the year and at the annual conference.
- To support the Grad/Professional Chair for any trainings they may provide during the year and at the annual conference.
- Assist with the trainings and sessions provided at the annual conference that addresses all areas for the FASFAA members and attendees.

### ***Goals***

- To provide an agenda for the annual conference that will attract attendees of all areas of financial aid, based on the tracks we discussed at the conference committee in the fall.
- Continue to provide support of the various delivery methods of training modules to increase outreach to members and increase membership overall.
- Provide support to FASFAA Training Committee and the Conference Committee. Act as a liaison between both.

### ***Accomplishments***

- I started the 19-20 FASFAA year with very high expectations. While it did not turn out how I expected, overall and in spite of a national pandemic, I feel I served our membership well in my capacity.
- I was able to work closely with President Barkowitz, Past President Kruger, Conference Chair Dr. Manselle and collectively we put forth virtual trainings that would appeal to the entire membership.
- Two years really does fly by, but I have enjoyed being a part of this board, continuing to learn and grow and pass that along to colleagues. I now hand over this role to my successor who I will continue to support in any way possible.

## Jenny Cun – Secretary

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- Assist the executive board with communications and reporting responsibilities
- Record minutes for each meeting and distribute to executive board members

### ***Goals***

- Keep all executive board members with up-to-date information on board communication
- Send out compilation reports, meeting minutes and board meeting agendas prior to each board meeting

### ***Accomplishments***

- Send out necessary documentation to board members for upcoming meeting
- Complete all meeting minutes for board approval

### ***Recent Activities***

- Meeting minutes have been approved by board and submitted for posting on FASFAA website

## Katie Conrad – FASFAA Treasurer

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- The Treasurer is responsible for managing the Association's financial matters. This includes working with the Bookkeeper, Treasurer-Elect, President, and Fiscal Concerns Committee to ensure the soundness of the Association's financial position.

### ***Goals***

- Develop the roles of Treasurer and Treasurer-Elect to divide duties previously held primarily by the Bookkeeper
- Update FASFAA P&P to include the division of duties referenced above

### ***Accomplishments***

- Monthly reconciliations of Checking, PayPal, and investment accounts
- Producing financial statements prior to each Board Meeting to provide the Board the most up-to-date information regarding our financial position
- Transitioned to electronic checks directly from bank for reimbursements
- Transitioned from PayPal to PayScape for credit card payments through MemberClicks website
- Formalized duties of the Fiscal Concerns Committee and updated P&P
- Formalized the annual audit/financial review process and updated P&P

### ***Recent Activities***

- Worked closely with the Bookkeeper and Treasurer-elect to reconcile all FASFAA accounts on a monthly basis
- Provided the Profit & Loss statement, Balance Sheet, and Budget vs. Actual statement for Board Meetings
- Provided a review of the financial position during the Annual Business Meeting
- Assisted with membership questions and requests for duplicate invoices and receipts
- Active Participant of the Conference Committee
- Active Participant of the Fiscal Concerns Committee
- Created description of the Fiscal Concerns Committee for Board approval to update the P&P
- Updated the annual audit/financial review section of the P&P to specify the responsibility and timing of the review
- Work with Bookkeeper and Past-President to schedule and provide data for annual financial review

## Eileen Brzozowski – Treasurer-Elect

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To serve FAFSFAA.

### ***Goals***

- Define the role of Treasurer-Elect.
- Further develop documentation and procedures for the Treasurer and Treasurer-Elect.

### ***Accomplishments***

- Developed documentation for account reconciliation.
- Developed draft master calendar for Treasurer/Treasurer-Elect.
- Performed preliminary analysis of institutional versus individual memberships. Further discussion of this topic to be included in future strategic planning.

### ***Recent Activities***

- See above.



## Shana Gore – Region I Representative

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- As the Director at a regional FL SUS, my institution's opportunities for training within our region and relationships developed throughout our region have been essential to professional development and training for our team. As Region I rep, I now have the opportunity to serve my region and be more engaged with my region. This position also gives me the opportunity to educate my region on the work and mission of FASFAA.

### ***Goals***

- Provide informative and engaging regional workshop
- Recruit additional volunteers to FASFAA
- Increase FASFAA membership from Region I
- Provide at least one NASFAA credentials training
- Identify opportunities for virtual training and engagement within our region

### ***Accomplishments***

- Held successful fall Region I Workshop in Fort Walton Beach, FL
- Used a different format for Bonnie Pirkle Scholarship and raised \$150
- Delivered NASFAA credential training at Fall Region I Workshop (Needs Analysis)

### ***Recent Activities***

- Researching options for a fall 2020 virtual Regional Workshop.

## Nichole Crowley – Region II Representative

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

As Financial Aid professionals we are innovative, responsive, self-motivated, and constantly strive to reach our potential by seeking new challenges and opportunities for professional growth. Even as most of us feel confident that our education, abilities, and job-related experiences have prepared us all to be exceptional employees, we can take it to its next level.

I am here to challenge myself, and my FASFAA teammates to share information, develop burgeoning Financial Aid talent, implement best practices and further create that positive, enduring impact in the lives of our students and their families.

- Establish Region membership number benchmark and define measurable objectives for growth
  - 2019-20 = 131
- Increase number of NASFAA-credentialed Region members
  - Minimum – 1 new person in Region per Workshop (or mini-session)
- Facilitate Spring 2020 Region Workshop
  - Identify Workshop Committee (Workshop Champions) – host site – confirmed; cancellation due to closures
  - Solicit credentialed FASFAA members to offer sessions per Committee/Champion requests
  - Solicit new technology for video conference and webinars
    - Support of training initiatives in delivery of sessions
- Representation of the Region in the YELLOW Initiatives
  - Yellow Brick Roads...to leadership, service
  - Sunshine Ahead...sharing optimism and enthusiasm in financial services...
  - Highlights...Yellow is the most visible color from a distance...what do we see happening across the Region
    - 12 Months July 1-June 30 (all descriptions of yellow - FRESHNESS, HAPPINESS, POSITIVITY, CLARITY, ENERGY, OPTIMISM, ENLIGHTENMENT, REMEMBRANCE, INTELLECT, HONOR, LOYALTY, JOY)
- Execute the tenets of the organization with aplomb, integrity and enthusiasm

### ***Recent Activities***

- Bonnie Pirkle recipient – Odyssey Sparks, Bachelor of Science Forensic Investigations, grad 8/2021
- FASFAA Webinar Series planning (VP Training, N. Bailey)
- FL College Access Network (FCAN) Local College Access Network (LCAN) participation
  - Leader Symposium
  - Earn Up Steering Committee

- Strategic Communications Subcommittee
- 2019-20 NASFAA Credentialing in progress; sessions registered
- 2019 FASFAA Policy and Procedures, By-Laws Revision Committee Volunteer
- 2018-19 SASFAA Communication Committee Volunteer
- 2018-19 SASFAA Legislative Affairs Committee Volunteer
  - Participant in scheduled meetings
  - Ideas-sharing for upcoming advocacy efforts

## Abigail Troche – Region III Representative

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- This opportunity has allowed me to be part of an association that is working for the benefit and support of the Florida Financial Aid community.

### ***Goals***

- Professional Growth
- Develop relationships in the FA community
- To be able to contribute to the improvement and support of our FA community.

### ***Accomplishments***

- I was able to coordinate the Region III workshop with the assistance and participation of wonderful colleagues.
- Have developed new great relationships in our FA community.
- Have broaden my understanding and commitment of being part of an association.
- Expanded my appreciation for leadership development.

### ***Recent Activities***

- Participate in different Board activities
- Review and research on the different FA program updates
- Expanded my approach in seeking assistance from FSA and other FA partners in providing training opportunities for our Region III community.

## Kylie Gross – Region IV Representative

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

To serve the entire region as a voice on the FASFAA Board and to support their continued professional growth by providing opportunities for training, networking, volunteerism, and community. The primary method this is accomplished through is the semesterly region workshop, but it has also required maintaining a presence in the region, formulating new communication tactics, and continually improving my abilities so that I can build the abilities of my region.

### ***Goals (compiled from 2019-2020 Executive Board Reports)***

- My goals for the 2019-2020 year included expanding the location of our semester region workshop, which has traditionally been held within the Tampa Bay area.
- Revamp the Bonnie Pirkle fundraiser at region workshops to make them more interactive.
- Build a network of speakers and volunteers that future Region IV Representatives can reach out to for future events.
- Increase membership from the southern area of Region IV.

### ***Accomplishments***

- Hosted the first workshop outside of Tampa Bay in quite some time which was successful in increasing membership from the southern area as well.
- A new Bonnie Pirkle fundraiser was tried using mystery envelopes and gift card prizes instead of 50/50. This was a success because we did raise about the same amount we typically do from Bonnie Pirkle but instead of ½ the funds being guaranteed to Bonnie Pirkle, all went to Bonnie Pirkle and gift cards (purchased out of the region budget) went to the winners. It also garnered a significant amount of friendly competition and community during the game.
- Networked and welcomed new members into the Region IV and FASFAA community.
- Communicated frequently with Bill Healy at Florida Southern and this is a location we may be able to have future region workshops.

### ***Challenges***

- Due to my medical leave beginning in December and lasting through almost the entire spring term I was not able to build a network of speakers and volunteers to help future region representatives.
- Additionally, due to COVID-19, the workshop- which was being planned by the VP of Training due to my absence- was also canceled.

### ***Recent Activities***

During the last two years as Region IV Representation here is a synopsis of some of the accomplishments that I have been a part of:

**Region/FASFAA Activities:**

- More members of FASFAA are credentialled in SAP, R2T4 and Professional Judgment.
- Increased membership from the southern area of Region IV.
- Held region workshops at The University of Tampa and Florida Southwestern State College-Charlotte Campus
- Continued our winning streak at the 2019 conference for the charity competition (2020 TBD)

**Personal Professional Growth/Activities:**

- Received my CFAA® from NASFAA in the first “cohort” that was eligible to test.
- In fall 2018 I presented at the New Aid Officer/Clock Hour Workshop.
- In fall 2019 presented a well-received session on interpreting the 2018 tax changes and how to use the new tax forms to complete verification before guidance was issued.
- Networked with other financial aid professionals and built stronger ties to better perform my job and improve my students’ experiences.
- Awarded two University of Tampa students with Bonnie Pirkle scholarships.
- Was elected to Treasurer Elect for the upcoming year.

## Jessica Ly – Region V Representative

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To create effective and exciting learning opportunities among higher education administrators
- To promote collaboration and learning opportunities among professionals
- To incentivize curiosity and interest in FASFAA's mission, vision, and role, as well as to enable financial aid professionals to get involved
- To welcome a diverse workforce into FASFAA as we work to promote the growth of the association

### ***Goals***

- Recruit volunteers into FASFAA
- Provide at least one NASFAA credential training workshop every year
- Provide the highest quality of assistance to Region V members and non-members
- Communicate with Region V often and purposefully
- Actively participate in executive board phone calls and meetings
- Continue to support FASFAA in all of the association's goals and activities

### ***Accomplishments***

- Updated FASFAA Region V News webpage
- Fall 2019 FASFAA Region V Workshop
  - 87 attendees
  - \$358 collected for Bonnie Pirkle Scholarship Fund
  - 1 credential presentation: Professional Judgment
- FASFAA Nominations Committee
  - Voted on FASFAA Election Slate
- As a result of COVID-19, worked with the Training Committee to accommodate our in-person workshop offerings to virtual webinars. A variety of webinars were successfully scheduled through the efforts of all the members in the Training Committee.
  - In lieu of an in-person Region V Workshop, we were able to offer: [Understanding Foreign and Other U.S. Territories Tax Returns](#), presented by Anh Do, to the entire FASFAA membership!
- Continued to support the Programs of St. Augustine Society- St. Francis Housing Crisis Center, and Port in the Storm Homeless Youth Center by donating and encouraging other FASFAA members in Region V to do the same.

## Karemah Manselle – Conference Committee Chair

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- I am here to serve the organization in a manner which represents my colleagues and profession well. I am also here to provide guidance to the 2020 Conference Committee, as we plan and execute an amazing annual.

### ***Goals***

**As conference committee chair, my personal goals are to provide the conference committee with leadership and guidance regarding the direction of the conference execution and to ensure the needs and concerns of the membership are considered throughout the conference planning process.**

Below you will find the goals developed for the 2020 Conference Committee:

- Our Members
  - By executing a conference that provides the opportunity for our membership to learn about regulations and best practices, while cultivating collegial relationships and networking.
- Our Colleagues in Other Departments
  - By offering collaborative conference sessions that will be of interest to partners and colleagues who are not aid administrators.
- Our Sponsors / Vendors (also members) who support our work
  - By ensuring vendors/sponsors concerns and input are considered during the planning and execution of the 2020 conference.
- Our Colleagues who are Not Yet Members
  - By reaching out to a vast array of PSIs in the state to ensure the financial aid community and other stakeholders are aware of the conference and its benefits.

### ***Accomplishments***

- The conference committee was incredibly agile and ingenious, as the conference pivoted from a fully in-person multi-day conference to an offering of virtual training sessions and FASFAA meetings, due the COVID-19 pandemic.

### ***Recent Activities***

- With the in-person conference cancellation, the conference committee focused on three pillars for the membership:
  - Regulatory Mastery
  - Professional Development
  - Networking Opportunities



- A full webinar offering has been developed for the membership including various sessions and activities normally hosted at the conference such as: multiple FSA training sessions facilitated by Dave Bartnicki, The FASFAA Business Meeting, The FASFAA Award Ceremony, and the Key Note Speaker Presentation which will be delivered by Rachel Allen, director of Valencia College's Peace & Justice Institute.
- The conference committee has upheld its commitment to the charity in the St. Augustine/Ponte Vedra area. The association will accept monetary donations from members, through June 19, 2020, to support the Programs of St. Augustine Society- St. Francis Housing Crisis Center and Port in the Storm Homeless Youth Center. The association has committed to donating up to \$1000, in addition to the amount collected from the membership.

## Kimberly Lent - Federal and State Legislative Chair

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To advance the association's policy and advocacy goals; to represent the membership's priorities with legislative stakeholders

### ***Goals***

- Host legislative webinar
- Represent the membership's priorities, value, and expertise with policymakers and influencers
- Work with SASFAA legislative committee to support regional initiatives

### ***Accomplishments***

- Hosted webinar in the fall re: state and federal legislative developments
- Legislative updates posted to website
- Conducted outreach with legislative and agency staff about potential impacts of proposed legislation
- Represented the FASFAA board and membership on the SASFAA legislative committee re: federal policy and affairs
- 

### ***Recent Activities***

- Tracking Governor's budget developments (needs to be signed by end of month)
- Tracking Governor's bill signing/veto actions
- Tracking CARES Act updates, USDOE guidance and updates
- Put together legislative tracking guidelines to next committee chair

## Laura Dickerson – Vendor/Sponsorship Coordinator

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To support and assist FASFAA with Opening the Door to members and sponsors.

### ***Goals***

- Increase sponsor visibility
- Maintain/Grow partner sponsorship for the organization
- Create a clear and concise partner program

### ***Accomplishments***

- Created a partner resource page on the FASFAA webpage for Partners to have space and relevance in the organization and be visibly seen
- Created and engaged a partner advisory group, led by Bill Ayers
- Original conference goal exceeded by over \$9,000. 29 partners committed to FASFAA through sponsorship, also attaining three new partners.
- After the cancellation of the conference, 12 partners maintained some level of sponsorship commitment to FASFAA, totally \$25,200 to the organization.

### ***Recent Activities***

- See above. All accomplished within the last two months.

## Jeff Daniels – Site Selection/Event Coordinator

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To serve the association to the best of my ability and to gain knowledge from other members of the FASFAA Executive Board. I also work to make sound and fiscally responsible decisions relating to the selection of facilities to hold various FASFAA meetings and events.

### ***Goals***

- To select sites for the following events: Clock Hour Workshop, New Aid Officers Workshop, FASFAA Conference, Executive Board meetings, and other events as deemed necessary.
- Negotiate contracts in a manner that does not negatively impact FASFAA.

### ***Accomplishments***

- During the 2019-2020 year I was able to select sites for the following events:
  - FASFAA Executive Board & Transition meeting – June 2019 – Embassy Suites Orlando – Lake Buena Vista
  - Executive Board and Conference Planning meeting – October 2019 – Sawgrass Marriott Golf Resort & Spa
  - Clock Hour Workshop – October 2019 – Embassy Suites Orlando North
  - New & Intermediate Aid Officers Workshop – January 2020 – Embassy Suites Boca Raton

### ***Recent Activities***

- The accomplishments listed above are essentially activities but I have added items.
- Negotiated contract for the 2021 FASFAA Conference. The conference will take place at the Hyatt Regency Grand Cypress in Orlando, FL. The contract with Hyatt Regency Grand Cypress was signed by President Barkowitz in November 2019.
- In preparation for the FASFAA Executive Board and Transition meeting scheduled for June 2020 I had started contract negotiations with Sheraton Orlando North in Maitland, FL. Due to COVID-19 we were not able to finalize the contract.
- Due to COVID-19 it was necessary to cancel the 2020 FASFAA Conference that was scheduled to take place in May 2020 at Sawgrass Marriott Golf Resort & Spa. In order to minimize the potential financial damage to our association I negotiated with the hotel, with the blessing of the FASFAA Executive Board, to hold the 2022 FASFAA Conference at their site. Initially the hotel wanted FASFAA to deposit \$5000 as would generally be the case if we were signing a new contract. I was able to convince the hotel to remove this requirement since we had already made a deposit of \$5000 when the contract was originally signed in 2018 and we weren't able to make use of the property due to the cancellation of the 2020 FASFAA Conference.

## OSFA Liaison – Louanne Standley

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- I, as the representative of the Florida Department of Education, Office of Student Financial Assistance (OSFA), have committed to actively support the Florida Association of Student Financial Aid Administrators (FASFAA) and its core mission. OSFA dedication is to fulfil our shared commitment and purpose with FASFAA. The purpose of **FASFAA** is to develop and maintain professional standards of financial aid administration, to promote cooperation and communication among its members, and to promote and endorse student financial aid programs that are consistent with good professional practice.
- In addition, We at OSFA share mutual significant goals of assisting FASFAA in achieving:
  - Enhance the professional competency of financial aid administrators, high school guidance counselors, and others concerned with the support and administration of financial aid through regular publications, workshops, conferences, research and training materials.
  - Facilitate communication between educational institutions and sponsors of student financial aid funds through an exchange of ideas, information and experience.
  - Promote an awareness of financial aid to students, parents, the secondary and post-secondary education community, and to other groups that may be identified.

### ***Goals***

- Enhanced competency by actively attending and participating in all FASFAA Executive Board Events.
- Facilitated communication by providing the FASFAA Executive Board and membership accessibility of myself and all leadership at the Florida Department of Education, Office of Student Financial Assistance (OSFA).
- Promoted awareness by immediately and rapidly responding to all inquiries from the FASFAA Executive Board and membership.

### ***Accomplishments***

- Achieved Goal: Enhanced competency by actively attending and participating in all FASFAA Executive Board Events by personally attending a great majority of events in person and or having representation at every FASFAA Executive Board event.
- Achieved Goal: Facilitated communication by providing FASFAA Executive Board and membership accessibility of myself and all leadership at Florida Department of Education, Office

of Student Financial Assistance (OSFA) by personally introducing myself to all Board Members and assuring my commitment and OSFA's to them individually and as an organization.

- Achieved Goal: Promoted awareness by immediately and rapidly responding to all inquiries from the FASFAA Executive Board and membership by effectively responding to numerous inquiries, questions, and referrals by both the Board Membership and the organization.

#### ***Recent Activities***

- Existing and continual support and dedication to the FASFAA Executive Board and membership in attending all FASFAA conference actives which were moved to the online format.
- Existing and continual support and dedication to the FASFAA Executive Board and membership moving forward for the 2020-2021 Year!
- Existing and continual support and dedication to the FASFAA Executive Board and membership for the FASFAA Presidential objectives for the 2020-2021.

## Kamia Mwango – Volunteer Coordinator

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

The Volunteer Services Committee is responsible for the facilitation of volunteer recruitment, organization, and mobilization. Responsibilities to encourage and promote volunteerism include: creation and organization of the volunteer database, follow-up with interested members to become volunteers, placement of interested members in appropriate roles within the association, mobilization of volunteers for critical organization functions, and facilitation of approved volunteer appreciation events.

### ***Goals***

- Outreach to all FASFAA volunteers
- Creation and Implementation of various templates for volunteer outreach
  - Calls, Emails, Email merge from database, Volunteer Info Preparation
- Creation and Implementation of overall best practices/procedures for volunteer coordination

### ***Accomplishments***

- Creation and collection of Volunteer Information Preparation Form
- Update of online volunteer form based on committee and member feedback
- Placement of multiple volunteers throughout FASFAA organization (in partnership with President Barkowitz)

### ***Recent Activities***

- Outreach (Personalized email) each time an interested volunteer completed the FASFAA form
- Connected volunteers to committee chairs
- Creation and Implementation of various templates for volunteer outreach
- Planned end of year email to volunteers thanking them for their role and/or interest, realizing that some had the opportunity to utilize their talents for the association and others intended to but did not have the opportunity.
  - Coordination of email to association to call for volunteers as we transition years/leadership

## Jerry McMahon – Electronic Services Chair

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- Maintain the Website ([www.fasfaa.org](http://www.fasfaa.org))
- Provide electronic support to the Membership and the Executive Board

### ***Goals***

- Maintain up to date information regarding each region, workshop and annual conference
- Assist other Board Members in providing updates to the site
- Setup/maintain Annual Conference presentation rooms
- Build up electronic supplies (projectors/cords) to minimize conflicts with donated laptops for the Annual Conference, NAOW/Clock Hour Workshops, and Region Workshops

### ***Accomplishments***

- Website migrated to new Memberclicks platform
  - More User friendly
  - Mobile friendly
  - Automated Invoicing
  - Membership renewal automation

### ***Recent Activities***

- Ongoing updates to organization activities



## Vanessa Alfaro – Communications and Outreach/Special Initiatives

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To increase our social media presence in our community.

### ***Goals***

1. Have at least 3 volunteers for my committee by 8/30/19
2. Implement “Financial Aid Tip Friday” and have weekly postings to our sites
3. Increase Social Media followers by 30% (August 1<sup>st</sup> we were at 420 now we are at 477) – Goal is 546

### ***Accomplishments***

1. I have a functioning committee with 3 volunteers (details of their duties below)

| <b>Initiative</b>                    | <b>Description</b>   | <b>Who is in charge?</b> |
|--------------------------------------|--|--------------------------|
| Financial Aid Tip Friday from FASFAA | Every Friday we will post a Financial Aid Tip, by Thursday COB please share with our team for approval and post Friday AM  | Dominique Leger          |
| Promoting Region Workshops           | We will work with each region rep to create flyers to promote region workshops and post all agendas and save the date  | Diana Clavijo            |
| Holidays/Even Pictures               | Every Holiday we will create a posting from FASFAA to our followers and we will also post pictures from all FASFAA events (workshops, board meetings, conferences, etc.) | Danielle Walton          |

2. We have implemented FASFAA Tip Friday
3. We are up to 516 followers (30 followers away from 30% increase)

### ***Recent Activities***

1. Started FASFAA tip Friday on Sept 20<sup>th</sup> and we have had weekly postings ever since
2. Had our third committee call on 6/9 at 10am
3. Two of my volunteers went to the Statewide Director’s Meeting
4. We are only 30 followers away from the 30% increase goal

## Ilia Cordero – Financial Literacy /Early Awareness

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To serve as a Financial Literacy / Early FAFSA Awareness

### ***Goals***

- To increase financial literacy awareness through peer to peer learning and early FAFSA Awareness

### ***Accomplishments***

- Brought attention to financial literacy awareness to workshops and training sessions.

### ***Recent Activities***

- Successfully presented at the New Aid Officers/ Intermediate aid Officers Work shop in Boca Raton
- Presented with colleagues from Valencia College about the Financial Learning Ambassador Peer to Peer program at the state wide Directors meeting
- Co presented with Karemah Manselle in the Region 3 Training discussing the importance of financial literacy programming on college campuses.

## Chansone Durden – Newsletter

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- Coordinate and publish FASFAA Newsletter

### ***Goals***

- Publish Pertinent and Relevant Newsletter to Members

### ***Accomplishments***

- Publish 1 Newsletter

### ***Recent Activities***

- None

## Suzanne Evans – Membership Chair/Local Arrangements

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To ensure the timely processing of new and renewed FASFAA Memberships and Assist in the Local Arrangements for the annual FASFAA Conference

### ***Goals***

- Quickly and efficiently process new and renewed memberships
- Answer questions regarding membership
- Update membership records and assist with resolution of issues
- Assist in cleaning up duplicate memberships and database errors
- Set up Local Arrangements for the FASFAA Conference

### ***Accomplishments***

- Assisted with over 900 membership records and old record cleanup
- Kept the new membership unprocessed records to a minimum on Memberclicks
- Updated and/or corrected the Region on the active records
- Resolved questions and concerns regarding membership in a timely manner

### ***Recent Activities***

- This year has been a year of clean up and implementation of a newer version of Memberclicks. First, the number of inactive records had to be reviewed and many of them eliminated (if the record had been inactive for more than 5 years). This action saved the organization money since it was being invoiced on the number of records we kept on file. Second, the records that we kept had to be reviewed to eliminate duplicates, correctly identify the regions each member was a part of, update or activate the listservs each member is assigned to. Third, to resolve members' questions, concerns, requests for membership certificates and requests for invoices to allow for one payment of multiple members from a single institution. Finally, the organization saw a major uptick in the number of registered and paid memberships this year from years prior which leads to an increase in processing questions and issues that needed to be resolved in a timely manner. Being the Local Arrangements Chair, I was also in charge of arranging certain aspects of the annual conference, which unfortunately was cancelled this year so there are no updates concerning this aspect of this responsibility.

## Merrian King – Scholarship / Charity Chair

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To provide support to the association and serve as the Charity and Bonnie Pirkle (BP) Scholarship chair for the 2020 Conference.

### ***Goals***

- To represent the association as charity and BP scholarship chair.
- To organize and promote a successful Bonnie Pirkle scholarship raffle at the FASFAA annual conference.
- To assist the clock hour chair and region reps with promoting the BP scholarship raffle at annual workshops.
- Found a charity that will bring value and meaning to the association and members.
- Start working on getting volunteers to assist at the scholarship/charity table.

### ***Accomplishments***

- This year charity is “St Francis Housing Crisis Center and Port in the Storm Homeless Youth Center. I Contacted Robert Harris (904-824-8987) to get a logo for flyer.
- Provide the information for this charity to add to the website.

### ***Recent Activities***

- Assisted the Conference Committee Chair and President with information for the charity after the conference went virtual due to COVID -19
- Sent Charity information to the staff at my institution to help the association achieve the \$3000.00-dollar goal.
- Contacted Robert Harris to get information as to how the association will send fund to St Francis Housing Crisis Center
- Attended the FSA training sessions, commitment/board meeting and FASFAA Award Ceremony by web.

## Donna Kolb - 25+ Year Member Liaison / Leadership Development

Executive Board Report  
End of the Year, June 2020

**Pending Report**

## Kevin McCrary – Private College (For Profit/Not-for-Profit) Liaison

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To provide leadership and guidance for Private, Profit and Nonprofit institutions.

### ***Goals***

- To provide guidance to the FASFAA members, address any concerns for the institutions within my power of the organization.

### ***Accomplishments***

- A reference point for Private, Profit and Non-Profit institutions to get their concerns heard through the organizations. Also to let the organization be the voice of the ICUF organization. I do think we need to keep pulling together the interest of this group through the organization.

### ***Recent Activities***

- Assisted HCI College with addressing payments for membership. Recruiting other Private schools to join the organization. We had the opportunity participate in the FASFAA Director Meeting which included the ICUF group which expressed concerns that the organization could assist with issues of their concern, such as the certain cuts in the FRAG Grant by the State legislator. Education Advisory Board, Share of Information through FASFAA to ICUF

### ***Book Reflection***

I have read the book. The book is a great guide to leadership skills. Section three stands out the most to me because I do find myself rumbling with vulnerability. Daring Leadership, Leading from the heart. I know I need to invest time in my own fears as well as helping people around recognize theirs. It states daring leadership is not from hurt but from the heart. I have suffered deep hurt but I work hard for students from my heart so they can pursue their dreams of post-secondary education. I have also seen great leadership at work with Daniel guidance through the year. He has put the organization on a great road for success. It was a pleasure having the experience.

## Sandy Shimp – Graduate/Professional

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To create a Graduate Committee who will work together to re-create a FASFAA Grad/Prof presence

### ***Goals***

- Encourage members to sign up for the Grad/Prof listserv
- Create a 'Hot Topic' section on the Grad/Prof page
- Develop a Grad/Prof webinar for the Spring term
- Develop presentations for the annual conference

### ***Accomplishments***

- Committee has been put in place representing institutions and vendors
- Welcome message and directions to subscribe to Grad-Prof listserv sent out to 714 active and 1077 Inactive members
- Grad-Prof Webinar provided Feb 19<sup>th</sup>. Academic Calendars: Focusing on the Change in the Federal Definition of a Standard Term. Presented by David Bartnicki.
- Session options provided to the FASFAA annual conference committee which unfortunately needed to be cancelled:
  - Grad-Prof Panel – Replaced with Birds of a Feather session June 18<sup>th</sup>
  - Loan Counseling, Grad Loan Limits and PSLF Program
  - Sallie Mae's survey of 1,597 graduate students – did finances play a part in determining where and when they attend graduate school? Provided as a webinar May 14th
  - Regions Bank - Reality Check interactive session to simulate creating a budget after graduate school when entering the workforce and starting student loan repayment.
- Questioned minimal use of the list-serv. Based on input from the committee, the Grad-Prof institutions typically use discipline specific resources. For example, the Medical schools use Association of American Medical Colleges (AAMC) forum. StudentLoans.gov and NASFAA listserv are also commonly used – which is on our web page. It is an area of potential growth for FASFAA.



## Teriann Wright – Vocational - Technical Clock Hour

Executive Board Report  
End of the Year, June 2020

### ***Why am I here?***

- To serve the FASFAA Vocational / Technical Clock Hour sector with training and networking opportunities in the 2019-2020 school year.

### ***Goals***

- **Our Members**
  - Fall - Increase participation and involvement in the Clock Hour Workshop and Annual FASFAA Conference. Moderator or present at the clock hour sessions or assist with the agenda, session topics and registration tables. Be an active voice for the Clock Hour sector during the 2019-2020 school year.
  - Spring - Increase participation and involvement in the Annual FASFAA Conference. Moderator or present at the Annual FASFAA conference. Be an active voice for the Clock Hour sector during the 2019-2020 school year.
  - Year End - Unfortunately, we could not have the Annual FASFAA Conference due to the COVID19 crisis. Continue being an active voice for the Clock Hour sector during the end of the 2019-2020 school year via sending emails and hosting two Clock Hour webinars.
- **Our Colleagues in Other Departments**
  - Fall - Find opportunities to invite school departments (Business/Bursar Office and Admissions Office) and school Administration to attend the Clock Hour Workshop and Annual FASFAA Conference.
  - Spring - Find more opportunities to invite school departments to attend the Annual FASFAA Conference.
  - Year End - Unfortunately, we could not have the Annual FASFAA Conference due to the COVID19 crisis.
- **Our Colleagues who are Not Yet Members**
  - Fall - Expand the Clock Hour Workshop and Annual FASFAA Conference attendance with an invitation sent to school President's for respective departments and school Administration to attend these Clock Hour trainings as well as networking in the Financial Aid arena.
  - Spring - Expand the Annual FASFAA Conference attendance to others to attend these trainings as well as networking in the Financial Aid arena.
  - Year End - Unfortunately, we could not have the Annual FASFAA Conference due to the COVID19 crisis. We welcomed new members to participate in many webinars.

## ***Accomplishments***

- Fall - Prepared for the Clock Hour Workshop on October 28-30, 2019 (153 registered – 52 attendees from out of state with 16 states represented) – agenda, four presenters, meals/electronics needs, handouts for Lifecycle of a Clock Hour student activity, Bonnie Pirkle scholarship 50/50 raffle, etc.
- Spring - Prepared for the Annual Conference on May 26-29, 2020 by assisting the Conference Committee find Clock Hour session presenters and moderators. Also, assisted with other volunteering duties as assigned by the Conference Committee. Participated in meetings with the Training Committee on a monthly basis. Assisted with the content of submitting the NASFAA Gold Star Award related to the successful 2019 Clock Hour Workshop 153 participants attended.
- Year End - Unfortunately, we could not have the Annual FASFAA Conference due to the COVID19 crisis. I hosted the Clock Hour Basic webinar on May 15, 2020 to keep the Clock Hour sector informed of clock hour topics. A Birds-of-the-Feather webinar is forthcoming on June 18, 2020 with the Clock Hour sector. Participated in meetings with the Training Committee on an as need basis. My biggest accomplishment, **THE CLOCK HOUR FALL WORKSHOP WAS THE WINNER OF THE NASFAA GOLD STAR AWARD** related to the successful 2019 Clock Hour Workshop 153 participants attended (including out of state schools) and you can go to this link for more information [https://www.nasfaa.org/Gold\\_Star\\_Award](https://www.nasfaa.org/Gold_Star_Award). Daniel and I had an interview with NASFAA on June 3, 2020 and an NASFAA article will be forthcoming in a few weeks.



## ***Recent Activities***

- Fall - I had three Clock Hour Volunteer Committee conference call meetings one in August, September and October (seven volunteers on my committee).
- Spring - I had one Clock Hour Volunteer Committee email sent in February (seven volunteers on my committee).
- Year End - I had a zoom meeting with the Clock Hour Volunteer Committee in June to say **THANK YOU** for being a successful committee in the 2019-2020 school year (seven volunteers on my committee).

Tonja Watts, Carolyn Serino, Portia Carrion, Arminta Johnson (pictured) not pictured Lorrie Allen, Carolyn Johnson and Donna Falk. Also, recognizing Portia's upcoming retirement on June 30, 2020.



FALL Clock Hour Workshop Technical/Clock Hour Committee pictures (not in attendance Donna Falk had a prior commitment).



President Daniel with Teriann (end of a successful workshop)! **Thank you Daniel for all your support!**

