



**FASFAA Executive Board Meeting
Embassy Suites Orlando
Lake Buena Vista, FL
June 22, 2019**

2018-2019 FASFAA Executive Board

Elected Officers	
President	David Alexander
President-Elect & Nominations	Daniel Barkowitz
Vice President	Nadine Bailey
Secretary	Denise Asselta
Treasurer	Gail Rogers
Immediate Past President & Fiscal Concerns	Joan Bailey
Elected Region Representatives	
Region I	Kris Hatcher
Region II	Nichole Crowley
Region III	Sedrick Brinson
Region IV	Kylie Gross
Region V	Katie Conrad
Members At Large Appointments	
Annual Conference Co-Chair	Nathan Basford
Annual Conference Co-Chair	Merrian King
Global Issues Chair	Kamia Mwango
Federal Legislative Relations Chair	Irma Molinares
Committee Chair Appointments	
Electronic Services Chair	Jeremiah McMahon
OSFA Liaison & Newsletter Chair	Louanne Standley
Graduate Professional/Financial Literacy	Sandy Shimp
Scholarship Committee Chair	Laura Dickerson
Vocational-Technical/Clock Hour Chair	Kim Phillips
Membership	Jenny Cun
Site Selection / Event Coordinator	Jeff Daniels
Vendor / Sponsorship Coordinator	Chansone Durden
Communication/Outreach/Special Initiatives	Vanesa Alfaro
FASFAA Support	
Bookkeeper	Gwyn Francis

David Alexander - President

Executive Board Report

June Transition Meeting 2019

Why am I here?

I am here to serve the Financial Aid community in the state of Florida, as 2018-19 FASFAA President. As FASFAA continues the tradition of training and developing, I am here to provide support and direction for 2018-19. It was an honor to serve for 2018-19 and I look forward to supporting FASFAA and serving as Past-president for 2019-20.

Goals

- Ensure the FASFAA membership has training and learning opportunities in the form of regional workshops, an annual conference, webinars, communications, and more.
- Represent Florida at activities and events as required as duties of the president for FASFAA, SASFAA, and NASFAA.
- Increase volunteerism to serve for the financial aid community.
- Update the bookkeeping practices and successful have a financial review conducted.
- Support a charity that is recognized throughout the year and at our annual conference.

Accomplishments

- Provided the theme “Roadmap to Success” for the 2018-19 FASFAA membership and executive board.
- Ensured FASFAA provided an optimum level of training opportunities and programs to our membership.
- Represented Florida at activities and events as required as duties of the president for FASFAA, SASFAA, and NASFAA.
- Continued the FASFAA Leadership Program which included a series of webinars from Financial Aid Professionals.
- Formed a committee to review and propose Bylaws and P&P updates. This resulted to several updates and corrections to the Bylaws at the annual conference.
- Facilitated in the successful updating of the bookkeeping records and procedures, to comply with industry standards and to prepare the association for continual annual financial reviews.
- Formed an external committee to perform a financial review for 2017-18, with considerations of the board’s discussion.
- Provide the board with a slate from the submissions of award nominees for the Honorary Lifetime membership and Distinguished Service Awards.

Recent Activities

- Host the successful and well received 2018-19 Annual Conference
- Call a board meeting for the discussion of the appointed positions of the 2019-20 Treasurer and Treasurer-Elect
- Write an article for the newsletter
- Scheduled to attend the 2018-19 SASFAA transition meeting

Daniel Barkowitz - President-Elect/Nominations

Executive Board Report

June Transition Meeting 2019

Why am I here?

- It has been an honor and a privilege to be part of the FASFAA Executive Board for the 2018-19 year, and I have been excited to be working to support our association and our membership. As incoming President-Elect, I view my role as 1) helping our FASFAA President in achieving his goals and vision, and 2) learning all I can in preparation for my year as FASFAA President.

Goals

Building upon President Alexander's theme of a "Roadmap to Success" I plan on working on the following items in the coming year:

1. **Encourage Volunteerism.** We need to develop future FASFAA Leadership and the best way to do this is through active committees with dedicated membership
2. **Build upon last year's successful launch of the Leadership Program.** Last year, FASFAA began a leadership development program with an inaugural class of financial aid professionals. With a great pre-conference session at the FASFAA Conference, the cohort is now poised for its next steps forward.
3. **Ensure that there is a place within FASFAA for all members, including senior members of the financial aid community.** As part of the ongoing mission of FASFAA, it is important that we serve members of our community who have 10 or more years of financial aid experience.
4. **Work on by-laws / P&P Review.** In partnership with FASFAA Secretary, work to review, evaluate, benchmark and update By-Laws, P&P, and other governing documents of FASFAA.
5. **Carry out the assigned duties of the President-Elect as required by our By-Laws.**

Accomplishments

Much work has been accomplished on each of our collective goals.

- **Encourage Volunteerism.**
 - Established a Webinar program for the membership which delivered more than 10 webinars to more than 400 attendees during the year (note that attendee counts do not include replays of the recording).
 - Bill Spiers – Legislative Advocacy – 10/18/2018 – 18 attendees (**limited to FASFAA Professional Development Attendees**)
 - David Alexander - Managing Up – 11/7/2018 – 6 attendees (**limited to FASFAA Professional Development Attendees**)
 - Denise Asselta – Professional Development – 12/4/2018 – 12 attendees (**limited to FASFAA Professional Development Attendees**)
 - Daniel Barkowitz – Strategic Enrollment Management – 12/10/2018 – 11 attendees (**limited to FASFAA Professional Development Attendees**)

- David Bartnicki - This is David Bartnicki! – 1/15/2019 – 99 attendees
- Student Borrowing, Financial Literacy and Cohort Default Rate – 2/4/2019 – 66 attendees
- Wayne Kruger – Top 10 Websites Every FAA Needs to Know – 2/28/2019 – 59 attendees
- Billie Jo Hamilton – So You’re A Financial Aid Director – 3/20/2019 – 12 attendees **(limited to FASFAA Professional Development Attendees)**
- Dana Kelly – This is NASFAA! – 4/9/2019 – 22 attendees
- Billie Jo Hamilton – Promoting Yourself, Your Office, Your Profession – 5/2/2019 – 84 attendees
- FASFAA Bylaw Amendment review, two sessions: 5/9/2019 – 18 attendees, 5/14/2019 - 12 attendees
- Worked to solicit a number of new and innovative presentations for the FASFAA Conference
 - A View From the Corner Office – A session with DFAs from a various number of schools
 - Helping Students Fund their Roadmap to Success – A Conversation with Outside Scholarship Providers
 - Hot Topics in HR – A Conversation with an HR practitioner in Higher Ed about current issues.
- **Build upon last year’s successful launch of the Leadership Program.**
 - See above for the webinar schedule. All webinars were attended by Leadership Development members.
 - Encouraged ongoing volunteerism for current attendees (one of whom is now on the incoming FASFAA Board).
 - Worked to select a new manager of the program for next year (Donna Kolb)
- **Ensure that there is a place within FASFAA for all members, including senior members of the financial aid community.**
 - Developed “Senior Leadership” track at the 2019 FASFAA Conference.
 - Sent emails to presidents and senior DFAs for colleges statewide announcing FASFAA Conference and encouraging membership in FASFAA.
 - Worked to ensure that all members had representation within the candidate slate
- **Nominating Committee**
 - Led Nominating Committee and ensured that we had a slate with two candidates for every position.
 - Solicited nominations and in some cases had to select from more than 2 nominations for positions.
- **Work on by-laws / P&P Review**
 - Finished review of FASFAA Bylaws, proposed amendments, and membership accepted them.
 - As a result of the change, worked with Board to select new Treasurer and Treasurer-Elect for 2019-20.
 - Finished review of P&P with committee. Working on a process for ongoing review and maintenance for future years.
- **Carry out the assigned duties of the President-Elect as required by our By-Laws.**
 - Worked on budget, naming Board, and other tasks in preparation for the 2019-20 year.

Other Activities

- **Florida Philanthropic Network. This Professional Association is made up of philanthropic agencies in Florida who offer scholarships for higher education in the state of Florida.**
 - Continued to offer webinars, workshops and teleconferences on financial aid.
- **NASFAA**
 - Was asked to be inaugural National Chair for the Commission of the CFAA (Certified Financial Aid Administrator).
 - Took and passed the CFAA Exam, and achieved CFAA Certification.
 - Will be offering 3 sessions at the NASFAA National Conference.

- Attended the NASFAA Leadership and Legislative Conference (and served on the planning committee)
- **SASFAA**
 - Continued my participation as a member of the SASFAA Budget Committee.
 - Attended the SASFAA Conference
 - Attended the TASFAA (TN) Conference as part of the President Swap. Presented 3 sessions and provided an update on the CFAA program at a general session / lunch.
- **Florida College Access Network**
 - Attended the FCAN Summit and led two sessions on Needs Analysis as well as facilitating a conversation about the film “Unlikely” with the filmmaker.
- **Department of Education Federal Student Aid**
 - Served as a member of the FAFSA Design Review Team.

Nadine Bailey – Vice President of Training

Executive Board Report

June Transition Meeting 2019

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 Chair for any trainings they may provide during the year.
- To support the Grad/Professional Chair for any trainings they may provide during the year.
- Provide training tracks and sessions at the annual conference that touch 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.
- I would like to further examine various delivery methods of training modules to increase outreach to members – e.g. webinars.
- Provide support to Region Reps and Chairs.

Accomplishments

- FASFAA was able to have NASFAA credential courses presented at the region workshops, NAOW, Clock hour workshop and the pre-conference for the annual conference.
- Please see attached report from NASFAA in regard to people in Florida that have received their credentials, year over year.
- Requested that FASFAA social media sites were updated with upcoming events.
- Provided a well-rounded agenda at the annual conference.
- Was able to provide equipment for the conference.
- Ordered the giveaways for the conference.
- Although the frequency of the calls diminished, I was able to have communication with the Training committee.

Recent Activities

- Will be working with Joan Bailey on takeaways for my role within FASFAA and the conference, so the next VP of Training has a good foundation for success.
- Sent the pre-conference attendees the code for the NASFAA courses.
- Will get the final count of attendees for the pre-conference and conference.
- Working with the electronic services chair to update the survey and send it out to the members

Denise Asselta - Secretary

Executive Board Report

June Transition Meeting 2019

Why am I here?

- Assist the executive board with communications and reporting responsibilities.

Goals

- Assist all FASFAA members with any given tasks.
- 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.
- Work with President on any additional tasks that may need to be completed.
- Chair committee to update the bylaws and policy and procedures.

Accomplishments

- Send out necessary documentation to all board members for the transition meeting.
- Coordinated Bylaws and P & P updates.
- Sent out all meeting requests to board members.
- Complete all meeting minutes for board approval.
- Submitted minutes to all members for annual meeting.
- Updated our executive board contact list.

Recent Activities

- The updated Bylaws were voted on at the annual meeting and they were accepted with a majority vote.
- The P & P committee has almost completed their review and will be submitting their recommendations to the board upon completion.
- The secretary records are all complete and will be transferred to the incoming secretary. I will continue to provide assistance to the incoming secretary as needed.

Gail Rogers – Treasurer
Executive Board Report
June Transition Meeting 2019

Pending report

Joan Bailey – Immediate Past President & Fiscal Concerns

Executive Board Report

June Transition Meeting 2019

Why am I here?

- I am still here because I want to serve and give back to my profession, I want to help others develop knowledge and skills that empower them to make better contributions to the students we serve. I believe that I can bring an historical perspective to the organization. So far I have enjoyed what I have done and enjoyed working with the members of the organization. It hasn't been without challenges but nothing is ever without challenges. Thanks for the support of other board members who readily assisted when I call upon them.

Goals

- Work closely with all broad member to carry out the activities of the association.
- Duties as assigned to carry out the mission and goals of the president.
- Monitor the fiscal activities of the association – leading the fiscal concerns committee.

Accomplishments

- Assisted with Program planning for FASFAA annual conference and substituted for the VP of training who was unable to be at the conference.
- Made recommendation based on the investment company analysis to the board re scholarship funding available.
- Served on the committee that worked on revising the bylaws and policy and procedure document.

Recent Activities

- Completed with other members the revised policy and procedure document to be presented to the board at the final board meeting.

Kris Hatcher - Region I Representative

Executive Board Report

June Transition Meeting 2019

Why am I here?

- Serve the financial aid administrators of Region I

Goals

- Increase regional membership
- Explore the possibility of conducting virtual workshops
- Introduce information technology training sessions into workshop agenda
- Achieve fundraising & charity donation goals, as set forth by FASFAA's Executive Board
- Lobby for the expansion of need-based aid from Florida's Department of Education

Accomplishments

- Region I spring 2019 workshop held in March @ UWF in Pensacola
- Moderated and presented at the annual conference

Recent Activities

- Participated on Executive Board calls
- Served on policy & procedure sub-committees

Nichole Crowley – Region II Representative

Executive Board Report

June Transition Meeting 2019

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, it really is time to take it to the 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.

Goals

- 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 mini-workshops throughout the Region
 - Identify Workshop Committee (Workshop Champions) from regional participants (Daytona State College, Keiser University, St Johns River College, Santa Fe College, Univ of Florida, Florida Technical College...)
 - Solicit credentialed FASFAA members to offer sessions per Committee/Champion requests
 - Solicit new technology for video conference and webinars
- 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 the color 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

- No Workshops Held in Region
 - Fall – speaker/facilitator scheduling conflict - Region Rep unable to accommodate new dates, cancellation
 - Spring – low Registration, cancellation
- 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
- 2018-19 NASFAA Credentialing in progress; sessions registered

Sedrick Brinson - Region III Representative

Executive Board Report

June Transition Meeting 2019

Why am I here?

- I am here to support, communicate and be the voice for Region III members. I am also here to facilitate training experiences, share ideas and information that will help advance individuals personally and professionally.

Goals

- We created a caring, inclusive and safe environment that inspires my colleagues to achieve their goals, share their success and encourage others.
- We learned by committing to core competencies – Think, Value, Communicate, and Act – and the potential of each person to learn at the highest levels of achievement for personal and professional success.
- We strengthened our collaboration between institutions in Region III and to foster deep stewardship of our work. Region III will also support the professional development, career growth and healthy lives

Accomplishments

- Every semester, I ensured that the Region III webpage was updated with pertinent information regarding the regional workshops and presentations.
- Sent an email to the Region III listserv notifying them of the regional workshop information for Spring 2019.

Recent Activities

- Served on the Nominations committee
- The spring 2019 Region III Workshop was held on Friday, April 5, 2019 and was coordinated in a structured and well-organized manner. This workshop provided Region III members with the necessary tools & training they need to fulfill their financial aid duties and responsibilities. The workshop also provided a time for our members to come together and discuss their experiences, financial aid issues, and new regulations for the upcoming year for financial aid professionals.
- The Region III Spring Workshop was held at Valencia College, District Office on Friday, April 5, 2019 from 9:00 a.m. – 4:30 p.m.
- Members were strongly encouraged to participate in the Bonnie Pirkle Scholarship raffle, which will take place during the workshop

Kylie Gross – Region IV Representative

Executive Board Report

June Transition Meeting 2019

Why am I here?

Goals (from July 2018 and October 2018 EB Report)

- Provide the Region IV administrators with workshops that target the topics they feel are needed or that will help advance their professional abilities. I hope to accomplish this by continuing communication with members and having an open forum for suggestions on future trainings.
- Establish communication with other region representatives so that we can collaborate and share ideas to ultimately benefit all of our regional events and members.
- Increase the number of NASFAA U credentialed members.
- Increase volunteerism at regional events by encouraging other members to be presenters or through other tasks such as raffles, ice breaker activities or outreach to members.

Goals (new)

- Focus on bringing more events to the southern area of Region IV during 2019-2020. Specifically, to host one of the region workshops in the southern section.
- Long-term, encourage more participation in region workshops, specifically in the southern area of the region. Many schools in the southern area of Region IV are not members of FASFAA, the goal is to bring region workshops down to that section of the region so that we can encourage membership and hopefully boost overall membership rates in FASFAA.

Accomplishments

- Budget for the 2018-2019 was \$850 for the Region IV Workshops. The fall workshop cost came in at \$284.70 and the spring workshop cost was \$324.42. This is a total of \$609.12 and came in under budget by \$240.88.
- Contacts with additional Region IV members who have expressed interest in continuing to volunteer at FASFAA events and who also began volunteering at the FASFAA Conference to get involved.

Recent Activities

- Contacting both Florida Southwestern State College and Southeastern University to see about possibly holding our fall 2019 workshop at one of those locations. The preferred location would be Florida Southwestern as Southeastern is just outside the Tampa Bay area and is close to where we've had the most recent workshops.
- Contacting Brenda Brown, as she indicated there was someone from Region IV who was going to present at the conference and was unable to make it. Hopefully, we can have them come present at the upcoming region workshop.

Additional Notes

- Spring 2019 Region IV Workshop budget and overview will be provided at meeting.

Katie Conrad – Region V Representative

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To serve as a liaison between the Executive Board and the membership within Region V, and to support the goals of the FASFAA leadership team.

Goals

- Communicate Association business and training opportunities with the members in Region V
- Plan Fall/Spring Region V training workshops offering NASFAA credentialing
- Represent Region V for FASFAA advocacy efforts
- Increase Region V volunteerism and involve more members in the workshops
- Exceed 2017-2018 contribution to the Bonnie Pirkle Scholarship fund.

Accomplishments

- Updated Region V webpage with 2018-2019 information
- Conducted 2 Region V workshops with 2 different NASFAA Credential Trainings. Both were well attended and offered a range of topics. (details below)
- Exceeded the 2017-2018 Region V contribution to the Bonnie Pirkle Scholarship fund. Total for 2017-2018 was \$186, total for 2018-2019 was \$235.
- Awarded the Region V Bonnie Pirkle Scholarship to Nicolle Rincon during the Student Employee of the Year (SEOTY) celebration at FIU.
- Increased attendance at Region V workshops. Totals for 2017-2018 were 35 fall, and 23 spring. Totals for 2018-2019 were 58 fall, and 60 spring.

Recent Activities

- Served on the Bylaws and P&P Revision Committee
- Served on the Nominations Committee
- Served on the Training Committee
- Fall Workshop was a NASFAA Authorized Training Event. Our credentialed trainer, Sara Kaufman, used the NASFAA SAP curriculum for training and led a lively discussion about best practices in Satisfactory Academic Progress. We also offered sessions on 2019-2020 Application Processing, Verification, and the OSFA Update. Our presenters Sara Kaufman, Brenda Brown, Anh Do, and Adelfa Ukenye were key to a successful workshop and for drawing a huge crowd. There were 58 members in attendance.
- The Spring Workshop was also a NASFAA Authorized Training Event. Based on overwhelming feedback from the fall workshop, the topic of Return to Title IV was selected. Katie Conrad was the credentialed trainer and spent the day teaching R2T4 to a crowd of 59 members. Again, we were pleased to welcome many of the attendees as new members to our association. President-Elect Daniel Barkowitz joined us virtually through video to

welcome members to FAFSAA and to encourage volunteerism. His message moved several to volunteer as moderators for our conference. There were 60 members in attendance.

Nathan Basford – Annual Conference Co-Chair

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To serve as conference co-chair for the 2019 Annual Conference

Goals

- Work with Merrian King, co-chair and all committee members to put together 2019 conference.
- Work with Merrian to put together committee and conference budget.
- Present conference budget for 2019

Accomplishments:

Merrian and I were pleased to have the following serving on the 2019 Conference Committee:

Committee Members:

Karemath Manselle - 2020 Conference chair & Registration chair

Nadine Bailey – VP of Training

Jenny Cun – Membership & Charity chair

Jeff Daniels – Site Selection & Event Coordinator

Jerry McMahon – Electronic Service chair

Brenda Brown – Conference Website

Laura Dickerson – Scholarship chair

Cindy Lewis – Local Arrangements chair

Kim Phillips – Clock hour chair

Chansone Durden – Vendor/ Sponsorship chair

Ex-Officio Members:

David Alexander – President

Gail McKinney Rogers – Treasurer

Gwyn Francis – Bookkeeper

Recent Activities:

The 2019 FASFAA Annual Conference was such a success. The committee came together and worked to ensure all went well. As we know being in the financial aid profession, we must adapt to change so many times. This conference was an example of that. To begin with, Nadine Bailey, our VP of training reported that due to work related issues she would not be able to attend the conference. Nadine continued to work contacting presenters, working on scheduling sessions, and all the other task needed to ensure a successful conference. Joan Bailey stepped up to cover the duties of VP activities at the conference. Thank you, Joan, for your commitment and dedication.

The final budget update will be provided on Sunday. Gwyn, Jeff, Merrian and I will be meeting during our stay in Orlando and will work together to have the information to you all.

Thoughts & Follow up: Complimentary Conference Registration & Rooms during Annual Conference

FASFAA Current Policy:

Conference Complimentary Room and Registration **Policy 6.2**

Conferences are held annually and are meant to provide training and networking opportunities for members of FASFAA as well as guests.

In order to serve on the FASFAA conference committee you must be a member of FASFAA and be fully supported by your institution. This includes all costs or fees associated with attending the annual conference.

Complimentary Rooms

As a rule, providing complimentary rooms or registration is a means of:

1. Compensating members or guests whose responsibility during the annual conference prevent normal participation in meeting functions or
2. Compensating guests who are not members and whose sole purpose for attending the conference is to present training sessions or perform other duties associated with the conference.

Complimentary rooms, if available and needed, are provided as follows:

President – The availability of a complimentary room and specific nights covered are outlined in the hotel contract. Additional nights, before or after the conference, are at the expense of the individual or their employer.

Conference Chair – A maximum of one (1) night.

Local Arrangements Chair – A maximum of four (4) nights if the designated person is from the local area, therefore unable to secure accommodations.

Bookkeeper – A maximum of three (3) nights.

NASFAA President (or representative) – A maximum of two (2) nights.

SASFAA President (or representative) – A maximum of two (2) nights.

NASFAA Trainer – A maximum of three (3) nights.

Guest Speaker – A maximum of one (1) night if the individual must travel more than 100 miles to the conference site.

The value of excess complimentary room nights is applied to the master bill if the hotel contract allows. If the contract does not allow for this application to take place the excess room nights are applied to the conference budget.

Complimentary Registration

Complimentary full conference registration is provided to the following: NASFAA President (or representative), NASFAA Trainer, SASFAA President (or representative), Federal Trainer.

A maximum of two (2) complimentary conference registrations for winners of prizes and raffles.

Recommendations:

I feel that we need to review the current Policy & Procedure on complimentary rooms and registration for annual conferences. Below is information taken from the SASFAA Policy & Procedures on this concern:

- **Complimentary rooms are usually provided for the following:**
 1. The president to attend the annual conference and other professional workshops.
 2. Past-president, president-elect, vice-president, and secretary to attend annual conference.
 3. Conference chair (limited to one individual) to attend the annual conference
 4. Local arrangements chair (limited to one individual) to attend annual conference
 - 5. Sponsorship Chair to attend annual conference
 - 6. Membership chair to attend annual conference
 - 7. Treasurer to attend the annual conference and professional development workshops
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- **Complimentary registrations are usually provided to the following:**
 1. President, treasurer to attend the annual conference and other professional development workshops.
 2. Conference, Membership, and Sponsorship chair to attend the annual conference

I understand that President Alexander has assigned a committee to review the current Policy & Procedures, and hope that this will be one of the first items looked at because of the possible impact it will have on this up-coming annual conference.

I believe not covering cost for the individuals who step up to assist at conferences will cut into the involvement of individuals stepping up to serve.

If the Policy & Procedure is not updated or revised, then I feel the conference chair needs to include in their budget room cost for them during the conference. I do realize that conference chairs are usually from an institution, therefore the chairs institution would normally cover the cost. If a conference chair is retired, then the cost of hotel room for the week needs to be included in the budget.

Thoughts/Reflections:

I have enjoyed serving FASFAA this year as conference co-chair with Merrian King, and all the committee members. Working with each member on the committee has been exciting, and working together, we were able to provide a Roadmap to Success!

In order to continue the success, I feel that the board needs to set dates for all board meetings during the transition meeting. This year, we went back and forth, are we having a meeting or not. Not having in person board meetings seems to feel the board members are disconnected. An example, I feel that when reviewing the Policy & Procedure manual for updates, the recommendations should have been presented way before the conference, and not just weeks before the fiscal year ends.

Transition meeting: The idea of having individuals drive in on Saturday to attend transition meeting, and then having them leave on Sunday after three is not fair for those transitioning off the board. This needs to be looked at for those who drive four or more hours to and from the meeting.

Closing remarks:

I will continue to support FASFAA and encourage retirees to step up and serve. We must continue to encourage past presidents, and retirees to serve our great association.

President Alexander, I appreciate your dedication and commitment. Thank you for allowing me to serve under your leadership.

President- elect Barkowitz, wishing you a great year!

Merrian King – Annual Conference Co-Chair

Executive Board Report

June Transition Meeting 2019

Why am I here?

I am here to serve as conference co-chair and assist as needed. This year I had the pleasure to serve as Conference co-chair with Nathan Basford. So far I have enjoyed being a part of the association for 3 wonderful years and working with the conference committee and executive board members. I am thankful for the support of those board members who stepped in to assist in so many ways.

Goals

- To represent the association at all events and activities as con-conference-co chair.
- To assist as needed with duties to make the conference a successful
- To serve the association with integrity and respect to all.
- Monitor and assist the committee members to ensure tasks were complete on time.

Accomplishments

- Learned more about how the association is governed.
- Ensure that the members enjoyed the conference.

Recent Activities

It has truly been a pleasure to sever this year under the leadership of David Alexander and beside Nathan Basford. As I reflect on the events of the conference I am so grateful to all the members of the committee for your hard work and dedication to ensure the conference was

Kim Phillips – Vocational-Technical Clock Hour Chair

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To allow Financial Aid Administrators that process Clock Hour Aid to receive the training and networking they need through FASFAA.

Goals

- Increase enrollment at Clock Hour Workshop – enrollment up 19%
- Increase involvement of Clock Hour Members – Formed a committee for discussing topics at both Clock Hour Workshop and Annual Conference. Also solicited several clock hour participants to help at registration table and moderate sessions to get them involved in FASFAA

Accomplishments

- Developed a small group of clock hour participants to discuss the needs for training at the clock hour workshop and the annual conference. They included Jeanne Schurman from HCC, Robert Whiting from Miami Lakes Technical, Sara Aza Bono from Seminole State and Georgene Diaz from Erwin Technical College.
- Solicited Clock Hour members to Moderate Clock Hour sessions at Annual Conference- 5 sessions
- Helped with registration, name tags, thank you's, registration volunteer schedule and solicited specifically clock hour volunteers for registration to get them involved.
- Assisted in onsite planning of meals, rooms, functions, and was a contact for hotel as situations arose

Recent Activities

- FASFAA Conference

Sandy Shimp – Graduate Professional/Financial Literacy Chair

Executive Board Report

June Transition Meeting 2019

Why am I here?

- I am here to represent the graduate/professional program sector of the state of Florida.

Goals

- Develop a plan to increase membership from the graduate/professional sector across the state of Florida
- Gather input from prior graduate/professional representatives
- Reach out to graduate/professional institutions to determine their needs
- Provide training to be available for the Regional workshops
- Create a graduate/professional group across all regions to share and assist with institutional inquiries and concerns
- Determine topics and presenters for the 2020 state conference

Accomplishments

- Board members did ensure there were graduate/professional presentations at the state conference
- Presented FERPA at the state conference to all interested institutions including graduate/[professional institutions

Recent Activities

- Assisted as needed at the state conference
- Asked for input at the latest ICUF (Independent Colleges and Universities of Florida) meeting. There is an overall sentiment these institutions are content with working through their topics and issues within their current meeting structure. The FASFAA conference and regional workshops are additional days away from the office that are not as productive.

Kamia Mwango - Global Issues

Executive Board Report

June Transition Meeting 2019

Why am I here?

The purpose of the Cultural Diversity/Minority Concerns [Global Issues] Committee is to maintain a line of communication between the multicultural membership and the Executive Board. In addition to increasing multicultural membership and participation, the Committee will also be responsible for establishing synergistic interaction among members, informing the general membership of the concerns and issues of culturally diverse members, and ensuring multicultural representation on the various FASFAA committees and offices.

The committee chair will be responsible to provide review and update of policy and procedures affecting their committee (annually).

Goals

- The goal of the year is to integrate Cultural Diversity/Minority Concerns [Global Issues] training opportunities into the programming by coordinating with the VP of Training, Vocational-Technical / Clock Hour Chair, Region Reps President and President-Elect.
- This will ensure that specialized topics that are vital to the professional development of new and seasoned financial aid professionals, are provided to the membership via Clock Hour Workshop, region workshops, and the conference program, all with sound fiscal management.

Accomplishments

- Submitted an article for the SASFAA and FASFAA newsletters during the 2018-2019 year, to bring awareness to Global Issues/Diversity.

Recent Activities

- Actively contributed to the updated of the association bylaws and P&P as part of the review committee.
 - Recommended update to title and mission statement related to Global Issues.
 - The update reflects the breadth and inclusivity of the topics related to the committee and concerns that are addressed on behalf of the membership.
- Global Issues programming/track was included in the annual conference programming.

Jenny Cun - Membership Chair

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To be a welcoming resource for new and current FASFAA Members
- Help maintain the active membership profiles on memberclicks

Goals

- Develop marketing campaign to increase active memberships
- Keep members up-to-date on workshops, conferences, and other FASFAA events via listserv, emails, social media, etc.

Accomplishments

- 67 New Members and/or First-Time Attendees the Annual Conference
- 187 New Member Applications during 18-19 year

Recent Activities

- Created goodie bags for new members and first time attendees at the Annual Conference in Bonita Springs
- Sent emails throughout the year to promote region workshops, and conference

Jerry McMahon - Electronic Services Chair

Executive Board Report

June Transition Meeting 2019

Why am I here?

- Maintain the Website (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 updates on going as changes are needed
- Annual Conference Completed

Recent Activities

- Swapped forms over to 2019-20 New Membership and Renewal Applications
- Updated Ex Board page with 2019-20 Board info

Irma Molinares – Federal Legislative Relations Chair

Executive Board Report

June Transition Meeting 2019

Pending report

Louanne Standley - Office of Student Financial Assistance Liaison

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To be a welcoming resource for new and current FASFAA Members on OSFA behalf

Goals

- The OSFA mission is to facilitate higher education access and services by providing exemplary customer attention, comprehensive financial aid information, and convenient and efficient products
- Keep members up-to-date on State Scholarship and Grant Programs

Accomplishments

- Met with current and upcoming FASFAA Executive Board members to pledge continual support

Recent Activities

- Attended FASFAA conference
- OSFA presented at FASFAA Conference
- Sponsored FASFAA Conference

Laura Dickerson – Scholarship Committee Chair

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To provide support to the organization through volunteerism and coordinate efforts for BPS

Goals

- To work with each region representative and VP of training to promote the BPS at regional workshops throughout the year
- Coordinate/promote/execute a successful BPS raffle at the annual conference

Accomplishments

- Worked with VP of training to coordinate and share BPS information at regional workshops
- Worked with each Region Rep to promote and disseminate BPS information at their workshop by creating a power point easily delivered to attendees, and promote giving to the BPS through a 50/50 raffle
- Created a new BPS experience at BPS to drive awareness and understanding of the scholarship FASFAA has promoted for over 20 years and ensure a successful 50/50 raffle at the conference.
 - Created a digital slide show to promote BPS at FASFAA
 - New game experience to draw more into the BPS table
- Created a BPS checklist for future BPS scholarship chairs to follow
- Created the BPS region rep scholarship challenge to promote excitement at workshops

Recent Activities

- Summary on attached of early BPS raffle targets- 7% growth overall, conference 86% growth over 2018
- For 2019 – over \$100,000 has been awarded since the inception of BPS in 1997
 - 13 scholarships awarded this year, to 7 different schools totaling \$10,000

Bonnie Pirkle Regional Scholarship Tracking

Money Deposited	Region 1	Region 2	Region 3	Region 4	Region 5	Annual Conference	Total
16/17	105	180	58	260.50	125	448	1176.50
17/18	225	132	67	258	186	370	1238.00
18/19	105	0	197	106	235	687	1330.00
19/20							
20/21							

16/17 Raffle Totals per region

	Fall		Spring		Total	
	Total Collected	BP Donation	Total Collected	BP Donation	Total Collected	Total BP Donation
Region 1	102	51	108	54	210	105
Region 2	200	100	160	80	360	180
Region 3	53	26.5	53	26.50	106	58
Region 4	241	120.50	280	140	521	260.50
Region 5	90	45	160	80	250	125
Conference					896	448
	686	369.50	771	385.50	1906	1176.50

17/18 Raffle Totals per region

	Fall		Spring		Total	
	Total Collected	BP Donation	Total Collected	BP Donation	Total Collected	Total BP Donation
Region 1	120	60	330	165	450	225
Region 2	200	100	70	35	270	132
Region 3	70	35	64	32	134	67
Region 4	294	147	222	111	516	258
Region 5	230	115	142	71	372	186
Conference					370	370
	914	457	758	384	2112	1238

18/19

	Fall		Spring		Total	
	Total Collected	BP Donation	Total Collected	BP Donation	Total Collected	Total BP Donation
Region 1	0 Hurricane	0	210	105	210	105
Region 2 **	0	0	0	0	0	0
Region 3	82	82	115	115	197	197
Region 4	69	69	42	37	111	106
Region 5	210	105	270	130	480	235
Conference			1212	687	1212	687
	361	256	1849	1074	2210	1313.00

** did not hold any region workshops this year

18/19 BP Scholarship Challenge

Each event to raise 25% more funds than the previous year

About \$45 more per workshop

The winning region rep will receive a special prize during the next annual FASFAA conference

To be successful:

- 1- Send emails to the membership 3 times prior to event
 - a. Consider having a basket raffle or 50/50 raffle
 - b. Reminders to bring cash for the raffle
 - c. Send and share the BP raffle flyer prior and during event

Engage during workshops to grow the scholarship this year and make it fun for everyone.

You are busy, so appoint someone to take the lead during the workshop and work the crowd.

Tickets are exceptionally reasonable and the benefit enormous! Post the tickets page and description during your workshop and remind everyone before, during lunch, and one final push prior to the drawing of the prize. They will half of the funds collected! In my experience, the big push in the final announcement always gets folks so excited. Especially is you are announcing what the current amount is.

Do you have everything you need for the raffle?

1. Raffle tickets? If not, purchase a roll of double sided raffle tickets at your local Dollar Tree, Walmart, Office Depot.
2. Assign a person to be the lead during the tabling event to take money, keep count, and make announcements about the collected amounts. ** if I am able to attend the workshop I am happy to take this one for you.
3. You need a basket for the tickets.
4. Money in singles, fives and tens to make change since you will be collecting cash
5. After the winner is drawn, capture the following information:
 - a. Total amount collected
 - b. Amount given to the recipient (sometimes they return a portion or all their winnings to the fund)
 - c. Name of winner
 - d. School
6. You will be mailing the money to Gwyn Francis with the annotation that the funds collected are for
 - a. BPScholarship Raffle and your Region number and name
 - b. Please email me with the above information as well so I can keep track

Have fun!!!!!!

If I can be of any assistance, please do not hesitate to reach out any time!!!!

Laura Dickerson 813 957-725 or laura.dickerson@salliemae.com

Jeff Daniels – Site Selection/Event Coordinator

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To collaborate with FASFAA Executive Board members and FASFAA members as a whole as well as deepen my knowledge of FASFAA as ideas are shared. In addition I want to serve the association in the best way possible as Site Selection Chair.

Goals

- To select appropriate sites for various workshops and the annual FASFAA Conference.

Accomplishments

- Was able to find a site for the 2018 Clock Hour and New Aid Officers workshop. The workshops were held at Embassy Suites – Orlando Lake Buena Vista. Since we were not able to meet the agreed upon room nights I negotiated with the site to waive the fee we were required to pay for not meeting our obligation if we agreed to hold our Executive Board/Transition meeting at the same location. I was also able to secure a site, with Executive Board approval, for the 2020 FASFAA Annual Conference. The 2020 FASFAA Conference will be held at the Sawgrass Marriott Golf Resort & Spa in Ponte Vedra Beach, FL.

Recent Activities

- Served as the main contact for the 2019 FASFAA Annual Conference at the Hyatt Coconut Point Resort & Spa. Reconciled the final hotel bill and worked with Gwyn Francis to submit a final payment to Hyatt. Completed survey provided by Hyatt Coconut Point to provide feedback on my experience with the site.

Chansone Durden - Vendor/Sponsorship Coordinator

Executive Board Report

June Transition Meeting 2019

Why am I here?

- To serve as FASFAA Newsletter Chair

Goals

- To create and distribute news to FASFAA members that's relevant and useful

Accomplishments

- Succeeded in reaching/exceeded the goals set for sponsorships for the annual conference

Recent Activities

- Secured sponsorships
- communications with sponsors and board members and president

Vanesa Alfaro – Communication/Outreach/Special Initiatives

Executive Board Report

June Transition Meeting 2019

Why am I here?

- Manage the social media activity by having up to date information of events and relevant news

Goals

- Increase social media views to keep our members informed and therefore increase our member count for workshops and conference

Accomplishments

- I have kept up with all workshop updates on our social media page
- Put together flyers for our social media site
- We have increased our social media activity in the last year
- I was the editor for the Spring 2019 newsletter
- Helped in the conference and kept our social media pages up to date

Recent Activities

- Recently I edited the FASFAA Spring 2019 newsletter for the first time
- Updated Facebook and Twitter with all conference updates and activities
- Take pictures at the conference

Gwyn Francis – Bookkeeper

Executive Board Report

June Transition Meeting 2019

Pending report