



**FASFAA Executive Board Meeting
Sawgrass Marriott
Ponte Vedra, FL
October 14 – 15, 2019**

Table of Contents

2019-2020 FASFAA Executive Board	4
Daniel Barkowitz – President	5
Dameion Lovett – President-Elect	8
David Alexander – Immediate Past-President/Fiscal Concerns-Chair/Parliamentarian	9
Nadine Bailey – Vice President of Training	11
Jenny Cun – Secretary	12
Katie Conrad – FASFAA Treasurer	13
Eileen Brzozowski – Treasurer-Elect	14
Shana Gore – Region I Representative	15
Nichole Crowley – Region II Representative	16
Abigail Troche – Region III Representative	18
Kylie Gross – Region IV Representative	19
Workshop Overview- Region IV Fall 2019	20
Survey Feedback- Region IV Fall 2018 Workshop	21
Region IV Fall Workshop- Projected and Actual Budget	22
Region IV Fall Workshop- Receipts	23
Region IV Fall 2019 Workshop	27
Jessica Ly – Region V Representative	28
Karemah Manselle – Conference Committee Chair	30
Kimberly Lent - Federal and State Legislative Chair	32
Trey Harrison – Global Issues	33
Laura Dickerson – Vendor/Sponsorship Coordinator	34
Jeff Daniels – Site Selection/Event Coordinator	35
OSFA Liaison – Louanne Standley	36
Kamia Mwango – Volunteer Coordinator	37
Jerry McMahon – Electronic Services Chair	38
Vanessa Alfaro – Communications and Outreach/Special Initiatives	39
Ilia Cordero – Financial Literacy /Early Awareness	41
Chansone Durden – Newsletter	42
Suzanne Evans – Membership Chair (Local Arrangements)	43

Merrian King – Scholarship / Charity Chair	44
Donna Kolb - 25+ Year Member Liaison / Leadership Development	45
Wayne Kruger – Webinars	46
Kevin McCrary – Private College (For Profit/Not-for-Profit) Liaison	47
Sandy Shimp – Graduate/Professional	48
Teriann Wright – Vocational - Technical Clock Hour.....	49
Gwyn Francis – Bookkeeper	50

2019-2020 FASFAA Executive Board

Elected Officers	
President	Daniel Barkowitz
President-Elect & Nominations	Dameion Lovett
Immediate Past President & Fiscal Concerns	David Alexander
Vice President of Training	Nadine Bailey
Secretary	Jenny Cun
Treasurer	Katie Conrad
Treasurer-Elect	Eileen Brzozowski
Elected Region Representatives	
Region I	Shana Gore
Region II	Nichole Crowley
Region III	Abigail Troche
Region IV	Kylie Gross
Region V	Jessica Ly
Members At Large Appointments	
Annual Conference Chair	Karemah Mansalle
Federal and State Legislative Chair	Kimberly Lent
Global Issues Chair	Trey Harrison
Vendor/Sponsorship Coordinator	Laura Dickerson
Site Selection/Event Coordinator	Jeff Daniels
Committee Chair Appointments	
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
FASFAA Support	
Bookkeeper	Gwyn Francis

Daniel Barkowitz – President

Executive Board Report
Fall 2019

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

- In partnership with each of you, I have worked to advance the goals above. Particular accomplishments include:
 - Helping to secure volunteers for committees through individual outreach to all prospective and current members.
 - More than 20 members have stepped forward to volunteer.
 - Working to invite every DFA, CFO and President of every participating institution in Federal financial aid in the state of Florida to support FASFAA and encourage their staff members to join.
 - As a result, we already have nearly 650 paid members.
 - Invited every DFA from every clock-hour institution participating in Federal financial aid in the country to join us for the Clock Hour workshop
 - As a result, we will have the largest attendance for any recent FASFAA Clock Hour workshop with more than 45 attendees from out-of-state.
 - Regular updates to membership on areas of training and other news.
 - As a result, we have delivered a FISAP webinar, are working towards several other webinars, and are working on Regional workshops.
 - Working to better manage our membership mailing list and database
 - As a result, we have reduced our database size (and associated costs) for inactive members, we approved a policy for “retiring” members, and we are working on cleaning up e-mail lists. We will also be upgrading our Memberclicks database to the most recent release.
 - Represent FASFAA to our regional and national associations and other professional associations and groups

- Serve on SASFAA Board.
- Led a SASFAA webinar on Embracing Economic Diversity in Higher Education with NCASFAA President Robert Muhammad.
- Continued my tenure as Inaugural Chair for NASFAA's CFAA Commission.
- Worked with FCAN and FPN to support college access and outreach
- Work with our partners (i.e. vendors and sponsors) to better understand their needs, to invite their active participation in our association, and to help connect institutional members and our partners.
 - Participated in our first Partner Advisory Call with great results (to be shared at our meeting).

Recent Activities

- See above

Book Reflection

I am hopeful that each of us have had the chance to draw important lessons from the reading of "Dare to Lead". To me, the most important message has been about rumbling with vulnerability – being personally open to feedback, being authentic and honest, and working together to create safe spaces for feedback, growth, and change.

Dameion Lovett – President-Elect

Executive Board Report
Fall 2019

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.

Accomplishments

- Selected conference chair for 2021.
- 2020-2021 theme (will build off of 2020 vision)— “Sharing the Vision, Shaping the Future”

Recent Activities

- Working with President Barkowitz on finalizing election committee.

Book Reflection

So far, I have learned the following:

1. Improve relationships and trust by boundary setting, reliability, accountability, vault closing, integrity, non-judgement and generosity.
2. By understanding yourself and your values, you can easily let your values guide you in making the right decisions.

David Alexander – Immediate Past-President/Fiscal Concerns- Chair/Parliamentarian

Executive Board Report
Fall 2019

Why am I here?

Support the President, Executive Board, and our Membership from the role of the Immediate Past-President. I shall also oversee the Fiscal Concerns Committee, as we strive to ensure the association remains in the best fiscal health. Next, to serve as parliamentarian for 2019-20. Lastly, to reform the Past President's Council, under the leadership of President Barkowitz. Overall, I am here to ensure FASFAA has a successful 2019-20 and apply my abilities to any area that utilize my assistance.

Goals

- Review the budget/actual figures monthly and ensure we are within pace of remaining within the budget and alerting the President and Executive Board of any concerns.
- Provide a pie chart of the budget/actual figures as needed (Board meetings, etc.)
- Form the Past-President's Council for 2019-20
- Participate as a mentor in the LEAP

Accomplishments

- Successfully finalized the 2017-18 financial review and addressed concerns by the committee, some of which can be used to help complete the 2018-19 review
- The Past-President's council has officially been formed for 2019-20

Recent Activities

- The sub-committee/task force of the Fiscal Concerns team was formed to review our current investment allocations, gather quotes from other companies, and suggest a plan of action.
 - The committee completed its research. The decision was made to remain with UBS, but update the allocation to prepare for a financial downfall and limit the risk of our investment.
 - Based on the research, we deemed FASFAA in need of an Investment Policy Statement. We gathered other State, Regional, and National Association's IPS as an example to build one for FASFAA.
- The first Past-President's Council meeting was on 9/27/2019.
 - The agenda included Introductions, past experience w/ the council, current state of FA discussion, newsletter review, conference timing, Listserve suggestions, volunteerism, and Institutional vs Individual memberships.

- There were a total number of 11 Past Presidents, 1 President- Elect, and President Barkowitz.
- I volunteered to become a LEAP mentor for 2019-20. I've had the pleasure to work with Ms. Lauren Rolston.

Book Reflection

The book was a great read overall. It clearly expresses the humility and vulnerability that leaders should possess. This was a great source of information for any current and/or aspiring leader. I enjoyed it!

Nadine Bailey – Vice President of Training

Executive Board Report
Fall 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 and New Aid Officer 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.
- Assist with the trainings and sessions provided 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.
- Continue to provide support of the various delivery methods of training modules to increase outreach to members.
- Provide support to FASFAA Training Committee and the Conference Committee. Act as a liaison between both.

Accomplishments

- Continuing my role of support.

Recent Activities

- Requested that FASFAA social media sites were updated with upcoming events.
- I have scheduled and have conducted conference calls with the members of the Training committee.
- Have had regular contact with Francisco and Karemah in regard to the curriculum and agenda content for the conference.

Book Reflection

Daring Leadership –

- This hit home with me. I wish everyone in leadership at my institution would read this book and reflect on the guidance we are being given.
- I know what my “armoring up” process looks like, it’s in my body language and my words. I tend to get this way when I feel someone appears to be diminishing my role.
- In the past, I would probably have used more of the tactics from armored leadership to get my point across and garner results. Now I am more empathetic in my approach.

Jenny Cun – Secretary

Executive Board Report Fall Meeting 2019

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
- Updated executive board contact list

Recent Activities

- Part of Graduate/professional committee. Going to research more on how to utilize the listserv to communicate to the grad/prof community
- Working on updating P&P appendix to align with new P&P document

Book Reflection

- *Pending*

Katie Conrad – FASFAA Treasurer

Executive Board Report
Fall 2019

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

Recent Activities

- Monthly reconciliations of Checking and PayPal accounts
- Provided the Profit & Loss statement, Balance Sheet, and Budget vs. Actual statement for two Board Meetings

Eileen Brzozowski – Treasurer-Elect

Executive Board Report
Fall 2019

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

- Received training on reconciling Wells Fargo and Pay Pal accounts.
- Received training on navigating website administration in MemberClicks.

Recent Activities

- Drafting procedures for accepting payments for Clock Hour Workshop in Orlando later this month.

Book Reflection

- It resonated with me when the book addressed how the *Dare to Lead* framework is still relevant in heavily regulated industries with a strong emphasis on compliance (such as financial aid).

Shana Gore – Region I Representative

Executive Board Report
Fall Meeting 2019

Pending Report

Nichole Crowley – Region II Representative

Executive Board Report
Fall 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, 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.

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 Fall 2019, Spring 2020 Region Workshops
 - 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

- Scheduled Fall 2019 Region Workshop
 - Friday November 1
 - St Johns River State College, Palatka, FL
 - Agenda finalization in progress
- 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
- 2018-19 NASFAA Credentialing in progress; sessions registered

Abigail Troche – Region III Representative

Executive Board Report
Fall Meeting 2019

Why am I here?

As a FASFAA member I will enhance and enrich my professional direction by being part of an organization that represents the values and ideals of our industry.

Goals

- To Support the Financial Aid community in my region by providing knowledge and guidance through the coordination and offering of professional workshops for the Fall and Spring term.
- To maintain an open line of communication with my colleagues.

Accomplishments

Expanding my professional network.

Recent Activities

I am working on the coordination of the Fall 2019 workshop:

- Selection and of a venue
- Developing the agenda
- Reaching out to colleagues to be presenters
- Coordination of the catering options

Book Reflection

****In progress.***

Kylie Gross – Region IV Representative

Executive Board Report
Fall Meeting 2019

Goals

- My main intent for this year was to bring the regional workshop to an area south of Tampa and I am very glad that I was able to accomplish this for our region.
- Another intent for the year was to revamp the Bonnie Pirkle fundraiser at the regional workshop, which was also done during this semester's workshop.
- My intent for the upcoming semester is to build a network of individuals that the future region representatives can use when planning their events.

Accomplishments

- Held the first Region IV Workshop south of the Tampa Bay area in a number of years.
- Tried a new fundraiser for the Bonnie Pirkle Scholarship instead of the 50/50 raffle and it was well received by the attendees and also was a fun break for the participants.
- The workshop covered two very important and "heavy" topics, 2018 tax returns and professional judgment, and we were able to cover both plus most of the communication presentation all within the time limit.
 - The communication presentation was cut short due to complications getting lunch transported upstairs.

Recent Activities

- See following pages for Region IV Workshop overview, budget, receipts, survey results and attendance.
- Researching locations for the spring 2020 workshop has begun. Location will likely be Lakeland or southern St. Petersburg.
- I've begun talking to the region about finding a new region representative as I would like to pursue a new position for the coming year.

Book Reflection

- Will discuss at meeting in person.

Workshop Overview- Region IV Fall 2019

Location Florida Southwestern State College, Charlotte
 Campus Date 10/4/2019
 Time 9:00am-4:00pm

Scheduled Sessions

Membership
 Updates
 Scavenger Hunt- Deciphering the 2018 Tax
 Return Your Role in Communication
 NASFAA U Credential - Professional Judgment

Registered 19
 No Shows 3
 Total Attendees 16

Funds raised for Bonnie Pirkle \$51.00

Obstacles

Finding presenters
 Host institution director left right before event
 Registration was an obstacle until right before the event
 Publix boxed lunches come in rotisserie chicken boxes, so they are hard to transport

Successes

Registration turned out to be above what was expected for the area
 Participation of attendees in open forum and games
 Jeopardy
 Participants said they learned a lot of new information
 Attendees were very excited to have the workshop in their area
 A number of attendees were not originally FASFAA members until the workshop
 2 supervisors who did not attend reached out about future workshops and interest in sending more staff

Survey Feedback- Region IV Fall 2018 Workshop

Total Surveys Collected:	15
Number of full day attendees	16
Survey Completion	94%

Average Session Ratings (on a scale from 1-5, 5 extremely useful)

Overall Content	4.86	Highest score: 5	Lowest score: 4
2018 Tax Return Scavenger Hunt	4.93	Highest score: 5	Lowest score: 4
Your Role in Communication	4.43	Highest score: 5	Lowest score: 3
NASFAA Credential (PJ)	5.00	Highest score: 5	Lowest score: 3

Amount Learned in each session (on a scale of 1-3, 3 I learned more than I

anticipated) Professional Judgment	2.53
2018 Tax Return session	2.60
Communication Techniques	2.27

Number of Years in Financial Aid

Less than 2 years	2
2 to 5 years	6
More than 5 years	2
More than 10 years	2
More than 15 years	1
More than 20 years	2

Additional Comments:

Kylie did a great job!
 Kylie was great, engaging and mindful of the need for breaks. No complaints. This was great! Have more of these.
 Very good job!
 The presenter was AHMAZING!

Region IV Fall Workshop- Projected and Actual Budget

Category	Projected Subtotal		\$377.71	Actual Subtotal		\$438.89	Comments
Venue	SUBTOTAL	Qty	\$0.00	SUBTOTAL	Qty	\$0.00	
Location Rental	\$		\$0.00	\$		\$0.00	No cost- Host school FSW
Equipment			\$0.00			\$0.00	
Food and Beverage	SUBTOTAL		\$199.76	SUBTOTAL		\$258.38	
Breakfast (Coffee)	\$15.99	2	\$31.98	\$15.99	2	\$31.98	
Breakfast (Donuts)	\$8.99	2	\$17.98	\$9.99	2	\$19.98	
Lunch (Box Lunch Sandwich)	\$7.49	20	\$149.80	\$7.49	24	\$179.76	
Lunch (Dietary Restriction)	\$9.99	2	\$19.98	\$9.99	2	\$19.98	
Beverages (Bottled Water, case)	\$5.49	1	\$5.49	\$4.49	1	\$4.49	
Ice	\$2.50	1	\$2.50	\$2.19	1	\$2.19	
Educational Materials	SUBTOTAL		\$0.00	SUBTOTAL		\$0.00	
NASFAA Credential	\$		\$0.00	\$		\$0.00	Purchased in Training Budget
Event Materials	SUBTOTAL		\$50.27	SUBTOTAL		\$48.27	
Backboard	\$3.99	1	\$3.99	\$3.99	1	\$3.99	
Double Stick Tape	\$5.29	1	\$5.29	\$3.29	1	\$3.29	
Amazon Gift Card (BP Fund.)	\$30.00	1	\$30.00	\$30.00	1	\$30.00	
Envelopes for BP Fundraiser	\$10.99	1	\$10.99	\$10.99	1	\$10.99	
Miscellaneous	SUBTOTAL		\$127.68	SUBTOTAL		\$132.24	
Travel (Round Trip)	\$0.56	228	\$127.68	\$0.58	228	\$132.24	Per D. Barkowitz 10/02/2019

Notes/Deviation from Projected Subtotals

Items listed as \$0 for projected subtotal were not included in initial budget

Publix sandwiches were originally estimated before 4 additional registrations

Region IV Fall Workshop- Receipts

Date: 09/20/2019



Final Details for Order #111-1298078-2298609

[Print this page for your records.](#)

Order Placed: September 20, 2019

Amazon.com order number: 111-1298078-2298609

Order Total: \$0.00

Shipped on September 20, 2019	
Items Ordered	Price
1 of: JPSOR 150 Pcs Mini Envelopes 15 Colors 3.2" x 4.5" Gift Card Envelopes, Small Colored Self-Adhesive Envelopes, Pocket Envelopes	\$10.99
Sold by: JPSOR (seller profile)	
Condition: New	
Shipping Address:	
Kylie Gross	Item(s) Subtotal: \$10.99
3015 W SANTIAGO ST APT 7	Shipping & Handling: \$0.00
TAMPA, FL 33629-8191	-----
United States	Total before tax: \$10.99
	Sales Tax: \$0.00
	Rewards Points: -\$10.99

Shipping Speed:	Total for This Shipment: \$0.00
One-Day Shipping	Total paid by Rewards Points: -\$10.99

Payment information	
Payment Method:	Item(s) Subtotal: \$10.99
Amazon.com Visa Signature Last digits: 0760	Shipping & Handling: \$0.00
Rewards Points	-----
	Total before tax: \$10.99
Billing address	Estimated tax to be collected: \$0.00
Kylie D. Gross	Rewards Points: -\$10.99
10330 Alberta Court	-----
New Port Richey, FL 34654	Grand Total: \$0.00
United States	

Region IV Fall Workshop- Receipts

Date: 10/02/2019



Final Details for Order #114-2950257-2658652

[Print this page for your records.](#)

Order Placed: October 2, 2019

Amazon.com order number: 114-2950257-2658652

Order Total: \$30.00

Shipped on October 2, 2019	
Items Ordered	Price
3 of: Amazon.com Gift Card in a Mini Envelope (Black)	\$10.00
Sold by: ACT Gift Cards, Inc.	
Condition: New	
Shipping Address:	Item(s) Subtotal: \$30.00
Kylie Gross	Shipping & Handling: \$0.00
3015 W SANTIAGO ST APT 7	-----
TAMPA, FL 33629-8191	Total before tax: \$30.00
United States	Sales Tax: \$0.00

Shipping Speed:	Total for This Shipment: \$30.00
One-Day Shipping	-----

Payment information	
Payment Method:	Item(s) Subtotal: \$30.00
Amazon.com Visa Signature Last digits: 0760	Shipping & Handling: \$0.00

Billing address	Total before tax: \$30.00
Kylie D. Gross	Estimated tax to be collected: \$0.00
10330 Alberta Court	-----
New Port Richey, FL 34654	Grand Total: \$30.00
United States	-----
Credit Card transactions	Visa ending in 0760: October 2, 2019: \$30.00



Region IV Fall Workshop- Receipts

Date: 10/03/2019



Region IV Fall Workshop- Receipts

Date: 10/04/2019

<h1>Publix</h1> <p>Punta Gorda Crossing 2310 Tamiami Trl Punta Gorda, FL 33950 Store Manager: Josh Goff 941-575-4740</p>		<p>Welcome to Dunkin Donuts PC 341938 Punta Gorda, FL (941) 575-6263 Store Manager: 10/4/2019 7:24:56 AM</p> <p>Eat In Order: 009</p>	
<p>PUBLIX SUB BOX 89.88 T F PUBLIX SUB BOX 89.88 T F BOX SALAD - EXECTV 19.98 T F TAX EXEMPT</p>	<p>Tax Exempt ID: 858015964</p> <p>Register:1 Tran Seq No: 236009 Cashier:Melanie G. *****SALE*****</p>	<p>2 12 Donuts 19.98 2 Bx Joe Orig Blnd 31.98</p>	
<p>Order Total 199.74 Grand Total 199.74 Credit Payment 199.74 Change 0.00</p>	<p>Sub. Total: \$51.96 Tax: \$0.00 Total: \$51.96 Discount Total: \$0.00</p>	<p>Change \$0.00 Amex: \$51.96</p>	
<p>TAX FORGIVEN 13.99</p> <hr/> <p>PRESTO! Trace #: 082665 Reference #: 1649351872 Acct #: XXXXXXXXXXXX1001 Purchase American Express Amount: \$199.74 Auth #: 832995</p>	<p>AMEX Card Num : *****1001 Terminal : 1 Approval : 809980 AID : A000000025010801 TVR : 0000001000 IAD : 064A0103A0A002 TSI : E800 AR : Y3 TC : E02BC8</p>		
<p>CREDIT CARD PURCHASE A000000025010801 AMERICAN EXPRESS Entry Method: Chip Read Mode: Issuer</p>	<p>USD\$ 51.96</p>		
<p>Your cashier was Estellita</p> <p>10/04/2019 7:16 S0266 R108 7263 C0241</p> <p>Explore the many ways to save at Publix. View bargains at publix.com/savingstyle</p> <p>Publix Super Markets, Inc.</p>			



Region IV Fall 2019 Workshop

Friday, October 26, 2018

Florida Southwestern State College- Charlotte Campus
 26300 Airport Road, Punta Gorda, FL 33950
 Building D, Room 202

This workshop is free to anyone who is a paid/registered member of FASFAA for 2019-20. If you haven't applied/renewed your membership for this year, by completing this form you authorize FASFAA to create an account and invoice you for the annual membership fee of \$30.

Are you interested in:

Name	Signature	Volunteering	Presenting
Ashley, Amey	Amey Ashley		
Baurer, Andrew	Andrew Baurer		
Dietter, Barbara	unable to attend		
Garcia, Mariana	masriana garcia		
Gonzalez, Michelle	michelle gonzalez		
Hartmann-Turner, Donna	Donna Hartmann-Turner		
Kazich, Chari			
Langston, Billy	Bill Langston		
Lewis, Cindy	Cindy Lewis		
Longwell, Elizabeth	Liz Longwell		
Lugo, Annette	Annette Lugo		
Poncelet, Michael	michael poncelet		
Porter, Lauren	Lauren Porter		
Powell, Margarith	Margarith Powell		
Roadarmel, Roxanna	Roxanna Roadarmel		
Rolston, Laurie	Laurie Rolston		
Russ, Cheri			
Smith, Felicia	Felecia Smith		
Voelmle, Joe	Joe Voelmle		

Jessica Ly – Region V Representative

Executive Board Report
Fall Meeting 2019

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 what we do in FASFAA, 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 non-members to become members for the first time or to renew membership.
- 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 Board Member Calls and Meetings.
- Continue to support FASAA in all of the association's goals and activities.

Accomplishments

- Ensured Region V webpage is up-to-date
- Recruited two volunteers into the Training Committee
- Finalized Fall 2019 Workshop
- Created Fall 2019 Workshop Flyer

Recent Activities

- Early into my tenure, I reached out to a few staff members whom I knew had not volunteered with FASFAA yet. I am happy to report that they are now enlisted volunteers. I have also been able to secure a date, location, and presenters for our first, 2019-2020 workshop. I have expanded my horizons and have been working with neighboring colleges and universities to finalize the logistics for the workshop. I have also been able to attend all our scheduled Board Calls and in-person meetings, which are essential to me as I learn about my new role.

Book Reflection

Dare to Lead is truly resonating with me. As I am reading the book and learning about what it takes to be a courageous leader, I am asking myself these questions: how vulnerable am I willing to be, and how will I respond to fear and/or uncertainty? As I am currently navigating some tough leadership situations at

work, I am reminded by Brene Brown to stick to my values and to trust that the process is just the journey. As I reflect on my reading, I am also reminded that it is okay to feel vulnerability or fear; even Brene experiences fear! I am working through my fear of failure and learning how to overcome failure because in order to succeed, I think that I have to be willing to fail more often than I'd like to allow myself to do so.

Karemah Manselle – Conference Committee Chair

Executive Board Report
Fall 2019

Why am I here?

- I am here to serve the organization in manner which represents my colleagues and profession well.

Goals

Personally, I strive to lead the conference committee in manner that will result in a well plan and well executed 2020 FASFAA conference.

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

- ***While we are still in the early stages of the planning process. The Conference Committee is fully formed. Members of the conference committee team are working diligently to achieve their respective goals. Thus far, The VP for Training and the Curriculum Coordinator have been begun to develop an outline for the conference sessions. The Sponsorship chair has begun meeting with our vendor partners to garner their input and feedback. We recently solidified the 2020 Conference Theme: FASFAA: The Key to Unlocking Your Full Potential.***

Recent Activities

- As Chair, I have sent an introductory communication to partners who are imperative to the success of the conference: NASFAA, OSFA, U.S. Department of Education, and Veteran Affairs.
- Vendor Packages recently were sent to 32 vendors.
- An Onsite, Conference Committee meeting is being planned for October 15 and 16.

Book Reflection

I am enjoying *Dare to Lead*. The concept of trust being built not with grand gestures but in the small moments really resonated with me. I am also appreciating the perspective on vulnerability and how it is an important underpinning of leadership. Brene Brown's explanation of shame as an emotion and the dichotomy of armored leadership vs. daring leadership is very insightful (particularly the breakdown on perfectionism).

Kimberly Lent - Federal and State Legislative Chair

Executive Board Report
Fall Meeting 2019

Pending Report

Trey Harrison – Global Issues

Executive Board Report
Fall Meeting 2019

Pending Report

Laura Dickerson – Vendor/Sponsorship Coordinator

Executive Board Report
Fall 2019

Why am I here?

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

Goals

- Increase sponsor visibility
- Maintain/Grow sponsorship for conference
- Create a clear and concise vendor program

Accomplishments

- Finalized the 2020 Vendor Sponsorship Conference levels
- Worked with Jerry/Electronic Chair, to update sponsor content on the web page
- Sent Save the Date email to vendors on 2020 conference
- Emailed all vendor partners with sponsorship opening for conference
- Created a vendor partner group – held first meeting (Lenny coordinating for team) to engage vendor participation and engagement

Recent Activities

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

Book Reflection

I am encouraged by the book daily. Brene's people people people focus speaks to me. Its ok to be vulnerable and keep on going, even when you can't predict future outcomes. Finding the potential in people is paramount.

Jeff Daniels – Site Selection/Event Coordinator

Executive Board Report
Fall Meeting 2019

Pending Report

OSFA Liaison – Louanne Standley

Executive Board Report
Fall Meeting 2019

Why am I here?

- Essential liaison between Florida Department of Education, Office of Student Financial Assistance (OSFA) and Florida Association of Student Financial Aid Administrators (FASFAA)
- Provide in depth analysis and impact of all existing and pending legislation on all matters pertaining to state financial aid funding

Goals

- Attend all FASFAA conference, committee, and board meetings via conference call or in person attendance
- Serve as primary point of contact for FASFAA executive board and all of its members

Accomplishments

- Attended and participated on all scheduled FASFAA conference, committee, and board meetings via conference call or in person attendance
- Promptly responded to all FASFAA board and membership inquiries, questions, and concerns

Recent Activities

- Secured participation of Office of Student Financial Assistance at upcoming FASFAA conference
- Sending Outreach Representative to provide state update at Clock Hour training.

Book Reflection

Kamia Mwango – Volunteer Coordinator

Executive Board Report
Fall 2019

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
- Update of online volunteer form based on committee and member feedback
- Creation and Implementation of overall best practices/procedures for volunteer coordination

Accomplishments

- Creation and collection of Volunteer Information Preparation Form

Recent Activities

- Contact with all volunteers up to August 2019
- Placement of multiple (active) volunteers

Book Reflection

Being humble, vulnerable and human enough to do self-reflection, take correction kindly and not be afraid/ashamed to fail is the only way to be courageous enough to create and innovate... not only as individuals, but as individuals ready to take the organization (FASFAA) to the next level.

Jerry McMahon – Electronic Services Chair

Executive Board Report

Fall 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
- All Fall Region Workshops updated and registration is live
- Clock Hour workshop registration is live, site is updated

Recent Activities

- Started process to update Memberclicks to the new version, scheduled for Dec 2019
- Updated Webinar info and registration forms for Clock Hour and Legislative Affairs
- Meeting scheduled for 10/18/19 for database cleanup project prior to migration

Book Reflection

In progress

Vanessa Alfaro – Communications and Outreach/Special Initiatives

Executive Board Report
 Fall 2019

Why am I here?

- To increase our social media presence in our community.

Goals

- Have at least 3 volunteers for my committee by 8/30/19
- Implement “Financial Aid Tip Friday” and have weekly postings to our sites
- Increase Social Media followers by 30% (currently we have 420 followers in FB, 30% increase will have us at 546)

Accomplishments

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

Initiative	Description	Who is in charge?
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

- We have implemented FASFAA Tip Friday
- We are up to 446 followers

Recent Activities

- Started FASFAA tip Friday on Sept 20th and we have had weekly postings
- Had our first committee call Sept 16th

Book Reflection

I really enjoyed reading the book, I think it is a book that everyone can benefit from. Even if you are not in a leadership role at your current position we all belong to some type of group and this book teaches you how to take charge and position yourself as a leader by understanding we are all just people and taking responsibility. We can make the difference by seen the potential in everyone and developing that potential. We must stay humble and vulnerable, be transparent with our teams or groups, and build trust with them. No one will follow you or respect you unless they trust you, when you build that trust they will believe in your vision and follow your lead. This was a great read and I have already purchased the book for my team to read.

Ilia Cordero – Financial Literacy /Early Awareness

Executive Board Report
Fall Meeting 2019

Pending Report

Chansone Durden – Newsletter

Executive Board Report
Fall 2019

Why am I here?

- Coordinate and build content for FASFAA Newsletter

Goals

- Create content that's useful and relevant members

Accomplishments

- Created first Fall Newsletter to be published/posted on FASFAA website

Recent Activities

- Coordinated and created content

Book Reflection

Learned good leadership goals to work towards.

Suzanne Evans – Membership Chair (Local Arrangements)

Executive Board Report
Fall 2019

Why am I here?

- Membership and Local Arrangements Chair

Goals

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

Accomplishments

- Keep the new membership unprocessed records to a minimum on Memberclicks
- Update and/or correct the Region on the active records
- Resolve questions and concerns regarding membership in a timely manner

Recent Activities

- Please see above

Book Reflection

Merrian King – Scholarship / Charity Chair

Executive Board Report
Fall 2019

Why am I here?

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

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.
- To found a charity that will bring value and meaning to the association and members.

Accomplishments

- Reviewed link for finding a charity for the upcoming year.
- Created a flyer to be used at the workshops to help promote the Bonnie Pirkle Scholarship.

Recent Activities

- Communicated via email/phone with clock hour chair and region reps regarding giveaways for the workshops.
- Spoke to Jenny Cun pertaining to charities and how she found charity opportunities in the past.

Book Reflection

- The book is a guide to help leaders reach deeper and examine themselves. Then take a chance to be different and think/step outside the box. I learned that weaknesses and fear can give us the strength to successful as a person/leader.

Donna Kolb - 25+ Year Member Liaison / Leadership Development

Executive Board Report
Fall Meeting 2019

Pending Report

Wayne Kruger – Webinars

Executive Board Report
Fall 2019

Why am I here?

- To support the professional development and growth of the associations, its members, and the profession by providing online training that is timely and poignant.

Goals

- Host 3-4 webinars for fall and for spring term, to provide unique training opportunities for our members. Move the webinars to a YouTube hosted channel that members can access and view.

Accomplishments

- Hosted the first webinar with over 70 attendees.
- Moved our old webinars to a new FASFAA YouTube channel and posted it to our web behind the login.
- Have finalized two more webinars for fall. Clock hours 101 and legislative relations and advocacy. Still have hope of fitting in one more between now and the winter holidays.
- Began work on planning spring webinars, which should include a graduate professional, conference intro.

Recent Activities

- Please see above detailed in accomplishments

Book Reflection

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

Executive Board Report
Fall 2019

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

- None at this point

Recent Activities

- Assisted HCI College with addressing payments for membership. Recruiting other Private schools to join the organization.

Book Reflection

I have read most of 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 education.

Sandy Shimp – Graduate/Professional

Executive Board Report

Fall 2019

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

- The committee is in place and we have had 2 productive meetings

Recent Activities

- Jenny Cun is looking into the ListServ issues and opportunities
- Laura Dickerson and Irma Molinares have reached out to the vendors to see if they have any materials which can be used in the webinar or even the annual conference
 - Laura has received input and is summarizing
- Brenda Noblitt and Ellen Gomes are providing input from the institution perspective
 - Brenda has provided topics from the 2019 Health Professions Financial Aid Administrators Conference
 - Ellen is new to the committee and will be a great asset with her experience
- Sandy is creating the welcome message to include steps needed to sign up for the listserv, upcoming plans and solicit topics for presentations.

Book Reflection

- Over all I find the book reminds me how important it is to be consistent. Not every act needs to be substantial, but consistency and personalizing it along the way will lead to success.

Teriann Wright – Vocational - Technical Clock Hour

Executive Board Report
Fall 2019

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**
 - 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.
- **Our Colleagues in Other Departments**
 - 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.
- **Our Colleagues who are Not Yet Members**
 - 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.

Accomplishments

- Preparing for the Clock Hour Workshop on October 28-30, 2019 (133 registered as of 10/5/19) – agenda, four presenters, meals/electronics needs, handouts for Lifecycle of a Clock Hour student activity, Bonnie Pirkle scholarship 50/50 raffle, etc.

Recent Activities

- Three Clock Hour Volunteer Committee conference call meetings one in August, September and October (7 volunteers on my committee).

Book Reflection

- I will take from the book thus far different ideas on how to become a better leader as well as how to manage your employees. Listening is KEY. I especially like the part of "Permission Slips" (taking a break) during meetings to regroup. This is often necessary however we seldom do.

Gwyn Francis – Bookkeeper

Executive Board Report
Fall Meeting 2019

Pending Report