



FASFAA Executive Board

2020 – 2021

Executive Board Report

October 2020

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2020-2021 FASFAA Executive Board

Elected Officers	
President	Dameion Lovett
President-Elect & Nominations	Katie Conrad
Immediate Past President & Fiscal Concerns	Daniel Barkowitz
Vice President of Training	Nadine Bailey
Secretary	Jenny Cun
Treasurer	Eileen Brzozowski
Treasurer-Elect	Kylie Gross
Elected Region Representatives	
Region I	Shana Gore
Region II	Chas Hammond
Region III	Abigail Troche
Region IV	Kimberly Gloster
Region V	Jessica Ly
Members At Large Appointments	
Conference Chair	Joan Bailey
Federal and State Legislative Chair	Wayne Kruger
Global Issues Chair	Jeff Daniels
Vendor/Sponsorship Coordinator	Laura Dickerson
Site Selection/Event Coordinator	Irma Molinares
Committee Chair Appointments	
Electronic Services Chair	Jeremiah McMahon
Early Awareness/Outreach/Financial Literacy Chair	Kimberly Lent
Membership Chair/Volunteer Coordinator	Suzanne Evans
Scholarship /Charity Chair	Merrian King
Grad/Professional (Private/For Profit/Non-Profit)	Brenda Noblitt
Vocational-Technical/Clock Hour	Teriann Wright
OSFA Liaison/Newsletter	Louanne Standley
FASFAA Support	
Bookkeeper	Gwyn Francis

Dameion Lovett – President

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Why am I here?

FASFAA's working theme for this year is ***See the Possibilities, Expand Your Horizons***. This year has turned out to be one of the most difficult in the association's history with the COVID-19 global pandemic. During these turbulent times, it takes dynamic leadership to ensure that the financial aid profession remains strong and its administrators are well informed. We must also be a source of mentorship to those just beginning their careers in the field in order to ensure there are competent professionals ready to assume leadership roles as others retire and leave the profession.

Goals

- Ensure the voice of FASFAA is heard within the financial aid community; to put stories, names and numbers forward to provide the full picture of the important issues concerning financial aid in higher education. Be a strong advocate to represent FASFAA in legislative matters at the state and national levels
- Increase FASFAA's participation in supporting the Florida College Access Network to help high school students successfully complete the FAFSA.
 - Provide financial aid training for high school guidance counselors to assist in their preparation of college bound seniors in the financial aid process.
 - Promote FAFSA awareness throughout the state by partnering with OSFA
 - Partner with high school districts across the state to promote FAFSA completion
 - Increase membership and facilitate the participation of members as volunteers.
- Create an open pipeline of members who can serve on committees to help further the completion of goals throughout the year.

- Provide additional training via executive board to members in order to help membership see the value of servant leadership; using this method to bring new and innovative individuals into the executive board.
- Continue to provide excellent webinar trainings to the membership

Accomplishments

- Agreed to serve on SASFAA's Diversity Leadership Program Committee
- Designated task forces for the year to work on special projects
 - Virtual Annual Conference
 - P&P Appendix
 - Website Review

- LRSP
- Formalized Sponsorship Prospectus document for Business Partners
- Began restructuring of Business Partners page on FASFAA website
- Provided the conference theme **Sharing the Vision, Shaping the Future** and logo to the conference committee

Recent Activities

- Attended two SASFAA Executive Board meetings, representing FASFAA
- Appointed Jeff Daniels to serve as FASFAA Global Issues chair to fill the seat vacated by Nadine Bailey's appointment to Vice-President of Training
- Nominated Jeff Daniels to serve as FASFAA representative on SASFAA's Global Issues Committee
- Nominated Wayne Kruger to serve as FASFAA representative on SASFAA's Legislative Issues committee
- Purchased NASFAA Online Events training materials to support FASFAA's training offerings of NASFAA credentials
- Renewing contract with LogMeIn for the GoToWebinar and GoToMeeting platforms
- Attended first three meetings with the Business Partners Advisory Board to ensure our partnership needs are being met for the year
- Met with UBS representatives to review FASFAA investment accounts
- Appointed Tracy Wiles, University of Tampa (twiles@ut.edu) and Sarina Babb, University of South Florida (sjohns10@usf.edu) to serve as the social media co-coordinators
- Appointed Kristina Chavers, University of Central Florida (kristina.chavers@ucf.edu) and Heidi Goldsworthy, Stetson University ([hgoldswothy@stetson.edu](mailto:hgoldsworthy@stetson.edu)) as webinar co-coordinators
- Appointed Jennifer Towers, University of Florida (towers82@ufl.edu) to serve as the coordinator for the FASFAA LEAP Program
- Appointed Geof Stam, Keiser University (gstam@keiseruniversity.edu) to serve as financial literacy coordinator
- Pete Hernandez (pedro.hernandez@fldoe.org) designated by Louanne Standley to produce the newsletter for FASFAA

Katie Conrad – President-Elect

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Why am I here?

- The President-Elect is responsible for Nominations and Elections for the 2020-2021 year, to support our FASFAA President in achieving his goals and vision, and for learning everything possible to prepare for my year as FASFAA President.

Goals

- Encourage volunteerism and involvement of our membership – and to ensure we have a strong pool of volunteers to fill all Executive Board positions
- Present a dual slate for all open positions on the ballot.
- Work closely with President Lovett to fulfill all of his goals for the year
- Participate on committees and taskforces to prepare a smooth transition to 2021-2022
- Begin revisions of the President’s Guide to be completed at the conclusion of 2022

Accomplishments

- Requested update for the Elections webpage to delete 2019 election info and replace with the announcement of open positions for 2021-2022.

Recent Activities

The Nominations Committee is a standing committee of the Association. It is chaired by the President-Elect and its members are the Regional Representatives. The elected positions open for the 2021-2022 year are: President-Elect, Secretary, Treasurer-Elect, Region 1 Representative, Region 3 Representative, and Region 5 Representative. Members interested in a nomination for an elected position should contact Katie Conrad, President-Elect.

Daniel Barkowitz – Immediate Past President & Fiscal Concerns

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Why am I here?

- As Past-President, my role is to support the President in the realization of his goals, and to help prepare the President-Elect for her year in leadership of FAFSAA.
- I have been asked to help with the leadership of the creation of our next Strategic Plan for FASFAA for 2021-2026.
- I will be providing ongoing technical support for the statewide / regional webinars, clock hour workshop and other workshops and webinars through the year.
- I will be working with the Budget Committee in creating and monitoring the finances and budget of the association.
- I will be leading the statewide Directors of Financial Aid Meeting.
- I will serve as a member of SASFAA's nominating committee and work as a planning and faculty member of the SASFAA Leadership Development program.
- I will lead and convene the Past-President advisory council.

Goals

- See above

Accomplishments

- Worked with the President, Treasurer, Treasurer-Elect, President-Elect and other members of the Budget Committee to create a balanced budget for 2020-21 using two different projected models – one for an entire virtual year, one for a mixed year (part virtual and part in person).
- Established a working plan for the development of the strategic plan. Worked with our consultant to identify process, people and outcomes.
- Established the account structure for the GoToWebinar platform, and served as main technical consultant for delivery of the Virtual Clock Hour Workshop.

Recent Activities

- Set up a Past Presidents Advisory Council meeting for 11/5/2020
- Designed the SASFAA Leadership Development logo, created the PowerPoint slide deck, chose a book for inclusion (Radical Candor), and will be delivering a session on Inclusive Leadership.

Nadine Bailey – Vice President of Training

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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.
- Provide support to the webinars that FASFAA will provide throughout the year.
- To maintain the FASFAA Training Committee, provide updates and resources to all committee members.
- Assist with the trainings and sessions provided at the annual conference that addresses all areas for the FASFAA members and attendees.

Goals

- To provide an agenda for the annual conference that will attract attendees of all areas of financial aid.
- 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

-

Recent Activities

- Regularly hold conference calls with the Training Committee, ensuring all Chairs are included and that updates are provided on a regular basis.
- Sent outreach to potential VIP presenters for the conference: DOE, OIG, VA, NCAA and OSFA.
- Created the call for proposals for the conference form for the website.
- Will send the call for proposals for the membership shortly.
- Going to work with the Membership Chair to update the volunteer form to try capture more members that are willing to offer training, especially NASFAA credentials.

Jenny Cun – Secretary

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Why am I here?

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

Goals

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

Accomplishments

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

Recent Activities

- Attended monthly meetings as part of Grad/Prof committee
- Updated document for directions to subscribe to FASFAA E-Lists

Eileen Brzozowski – FASFAA Treasurer

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Why am I here?

- To serve FASFAA.

Goals

1. Finish review Policies & Procedures started last year and make any necessary recommendations for revisions.
2. Finish documentation of SOPs and delineation of duties among bookkeeper, treasurer, and treasurer-elect.
3. Provide relevant financial information as FAFSAA needs to make decisions about pivoting its activities due to COVID-19 restrictions.

Accomplishments

- Monthly reconciliation complete through October.

Recent Activities

- See above.

Kylie Gross – Treasurer-Elect

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PENDING

Shana Gore – Region I Representative

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PENDING

Chas Hammond– Region II Representative

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Why am I here?

- I am here to serve the members of FASFAA Region II by facilitating high-caliber training and credentialing opportunities, fostering connections between institutions and financial aid professionals, and bolstering membership and participation in the association.

Goals

- Recruit volunteers within Region II
- Facilitate at least one NASFAA credential training workshop every year
- Provide effective and regular communication and updates to Region II members
- Actively participate in executive board phone calls and meetings

Accomplishments

- Collaborated with all Region Representatives to plan two NASFAA credentialing workshops for Fall 2020 that are open to the entire association

Recent Activities

- Contacted colleagues regarding presenting at future region workshops
- Updated Region II website
- Cross-trained with the webinar co-chairs to learn the technical aspects of GoToWebinar

Abigail Troche – Region III Representative

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Why am I here?

- To be part of an association that is working diligently in providing webinars and workshops to benefit and support of the Florida Financial Aid community in these challenging times.

Goals

- Professional Growth
- Develop relationships in the FA community

Accomplishments

- Learn how to and support virtual workshops and trainings for all FASFAA members.
- The association has come together to adjust to the current environment but still continuing to support the community with trainings and workshops
- Have developed new great relationships in our FA community
- Have broaden my understanding and commitment of being part of an association

Recent Activities

- Participate in different Board activities
- Review and research on the different FA program updates
- Learned the use of different portals to provide virtual workshops
- Understand the NASFAA credential policies to be able to offer his benefit to our FASFAA members

Kimberly Gloster – Region IV Representative

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Why am I here?

- To serve as a voice and a resource for Region IV members and the executive board, while also supporting the mission of FASFSAA.
- To assist with coordinating and facilitating training opportunities that develop and maintain professional standards throughout the FASFAA community
- To challenge myself to seek new opportunities for professional growth, and to improve my abilities so that I can best assist in improving the abilities of my region.

Goals

- Coordinate training that offers NASFAA credentialing opportunities.
- Communicate with Region IV purposefully.
- Support FASFAA organizational goals and activities.
- Maintain and possibly increase membership during the challenging times of COVID-19.

Accomplishments

- Assisted as an organizer in conducting the first virtual Statewide Fall Workshop, which replaced the historical Fall Regional Workshop.
- Submitted an article for the FASFAA Newsletter on behalf of all regions
- Maintained communication with current, past and new members by checking in via email, and by providing advice on financial aid and FASFAA related topics to those who seek.
- Encouraged past FASFAA members to renew membership by highlighting the importance and benefits of maintaining an active status.
- Welcomed new members into the Region IV and FASFAA community.

Recent Activities

- Updated the Region IV Website
- Cross-trained with the webinar co-chair to learn more about GoToWebinar
- Served as an organizer in conducting two Fall Statewide Workshops which offered NASFAA credentialing opportunities
 - R2T4 (October 16)
 - Professional Judgement (November 13)
- Served as a member on the Virtual Conference Task Force (project completion: TBD)

Jessica Ly – Region V Representative

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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 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 FASFAA in all of the association's goals and activities.

Accomplishments

- Assisted with organizing and hosted a Statewide Fall 2020 FASFAA Workshop
 - Go to Webinar platform used
 - On average 82 attendees were logged in
 - 1 credential presentation: Return of Title IV Funds

Recent Activities

- Planning the second virtual Statewide Fall 2020 Workshop
 - Date: Friday, November 13, 2020
 - Credential: Professional Judgment
 - Platform: Go to Webinar

Joan Bailey – Conference Committee Chair

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Why am I here?

I am 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 continue to bring a fresh perspective to the organization. I have enjoyed what I have done and enjoyed working with the members of the organization.

Goals

- To lead and serve with integrity and excellence
- To continue to support, training, advocacy and professional development of FASFAA's members
- Work closely with all broad members to carry out the activities of the association
- Lead the conference committee to plan and facilitate the 2021 annual conference

Accomplishments

- Conference planning has begun:
 - Conference logo chosen
 - Developed a conference planning activity guideline and disseminate to the members of the conference committee.
 - Coordinated with the members of the committee and provide oversight to ensure all duties are being carried out to ensure a successful conference.
 - Conference charity has been selected

Recent Activities

- Two conference committee meetings have been held, next meeting will be held on 11/6/2020. The VP is working on getting the call for session proposals out. Conference website is being work on as well as sponsorship solicitation and guest speaker search is being conducted.

Wayne Kruger - Federal and State Legislative Chair

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Why am I here?

- Support the association, continue to provide updated information to the membership and provide history to the board in its decision making.

Goals

- Increase the activity of legislative relations activity to members.
- Have an increase of state activity to the membership so that the association can take a more active role in state legislative activity when it occurs.

Accomplishments

- Continued to send out updates on legislative relations form IFAP, NASFAA, and other sources
- Joined the SAFAA legislative relations committee

Recent Activities

- Sending out updates via the list serve, very little legislative activity at this time.

Jeff Daniels – Global Issues

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Why am I here?

- To make meaningful connections with members of the FASFAA Executive Board and FASFAA members as a whole as well as deepen my knowledge of the Florida Association as ideas are shared. In addition, I want to increase awareness of Global Issues that impact our state and association.

Goals

- Provide links to various diversity and inclusion events and articles on the FASFAA website.
- Each month or quarter, on the FASFAA website, highlight an individual that has played a major role in advancing a global issue.
- Submit proposal for global issues interest session at the 2021 FASFAA Annual Conference.

Accomplishments

- Distributed multiple emails to members encouraging eligible individuals to submit an application to join NASFAA's Diversity Leadership Program (DLP).

Recent Activities

- Reached out to Theresa Mays, who serves as the SASFAA Global Issues Chair, to introduce myself as the Global Issues Chair for FASFAA. In this role I am automatically a member of the SASFAA Global Issues Committee.

Laura Dickerson – Vendor/Sponsorship Coordinator

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Why am I here?

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

Goals

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

Accomplishments

- Finalized partner resource page on the FASFAA webpage for Partners to have space and relevance in the organization and be visibly seen
- engaged partner advisory group, led by Bill Ayers, to discuss initiatives and support
- created and finalized the Partner Sponsorship Prospectus. Board approved in September 2020
- Emailed prospectus to potential partners as placeholder for annual conference
- Working with Brenda Brown and IT support to create, finalize and Launch partner prospectus on web
- Working to create a pivot sponsor document

Recent Activities

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

Irma Molinares – Site Selection/Event Coordinator

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PENDING

Jerry McMahon – Electronic Services Chair

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PENDING

Kimberly Lent – Early Awareness/Outreach/Financial Literacy Chair

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PENDING

Suzanne Evans – Membership Chair/Volunteer Coordinator

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Why am I here?

- Membership and Volunteer Chair

Goals

- Quickly and efficiently process new and renewed memberships
- Answer questions regarding membership
- Update membership records and assist with resolution of issues
- Outreach for membership and volunteers and disseminate the volunteers' info to the appropriate FASFAA Chairs

Accomplishments

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

Recent Activities

- Assisted the Region Reps, Conference Chair, Bookkeeper with resolving missing payments, volunteer collection and dissemination, email blasts to members, lapsed members and non-members and reconciliation of clock hour workshop registrants to payments to active memberships

Merrian King – Scholarship / Charity Chair

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PENDING

Brenda Noblitt – Graduate/Professional

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Why am I here?

- Chair of the Graduate/Professional/ Private committee

Goals

- Provide webinars for the Graduate/Professional/Private FASFAA sectors
- Update the Graduate/Professional/Private sector information on the FASFAA website
- Provide timely financial aid information to listserv members

Accomplishments

- Committee has scheduled a Financial Literacy webinar for November 2, 2020. The webinar will provide financial literacy information to the FASFAA membership.
- Committee has requested updates to the Graduate/Professional/Private information on the FASFAA website.

Recent Activities

- Our committee met this week to finalize the plans for the upcoming webinar. We discussed the best way for our committee to share up-to-date information with our members. We will be sending an email with the instructions for members to join the Graduate/Professional/Private listserv.

Teriann Wright – Vocational - Technical / Clock Hour

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Why am I here?

- To serve the FASFAA Vocational / Technical Clock Hour sector with training and networking opportunities in the 2020-2021 school year during these uncharted times

Goals

- **Our Members**
 - Offering more training opportunities virtually for the Clock Hour sector to stay in federal compliance especially with these uncharted times - COVID19 crisis (webinars and training opportunities) through Workshops and Conferences
- **Our Colleagues in Other Departments and who are Not Yet Members**
 - Continue the great connections made last year with other departments, the out of state guests and make new connections in the clock hour sector (grow membership)

Accomplishments

- Preparing for the first FASFAA Virtual Clock Hour Workshop on October 26-30, 2020 (130 registered as of 10/5/20) – updated agenda as needed, eleven presenters (some on a panel), Amazon gift cards to select a person to receive at each session (10) and Bonnie Pirkle scholarship 50/50 raffle, etc.

Recent Activities

- Five Clock Hour Volunteer Committee virtual conference call meetings via zoom: one in July, two in August, one in September and one thus far in October – two more meetings in October to come before the Virtual Clock Hour Workshop. I started with 12 volunteers on my committee, one has moved away, and another is losing her job in a few weeks so I am down to 10 committee members

Louanne Standley – OSFA Liaison/Newsletter

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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 inquires, 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 and Webinar Series