



## **FASFAA Executive Board**

**2020 – 2021**

## **Executive Board Report**

**February 2021**

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## 2020-2021 FASFAA Executive Board

<b>Elected Officers</b>	
President	Dameion Lovett
President-Elect & Nominations	Katie Conrad
Immediate Past President & Fiscal Concerns	Daniel Barkowitz
Vice President of Training	Nadine Bailey
Secretary	Denise Asselta
Treasurer	Eileen Brzozowski
Treasurer-Elect	Vacant
<b>Elected Region Representatives</b>	
Region I	Kris Hatcher
Region II	Chas Hammond
Region III	Abigail Troche
Region IV	Kimberly Gloster
Region V	Jessica Ly
<b>Members At Large Appointments</b>	
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
<b>Committee Chair Appointments</b>	
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
<b>FASFAA Support</b>	
Bookkeeper	Gwyn Francis

## Dameion Lovett – President

Executive Board Report  
February 2021

### ***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***

- See below

### ***Recent Activities***

*Additional details to be addressed by individual board reports*

- FASFAA Annual Clock Hour Workshop held October 26-30, 2020

- Financial Literacy for Graduate/Professional Schools held on November 2, 2020
- State of Florida Office of Student Financial Assistance Update webinar held on November 4, 2020
- FASFAA has held one NASFAA Credential Training Session on Professional Judgement on November 13, 2020
- Held end of the year Winter Solstice Celebration on December 16<sup>th</sup> for 43 members.
- Leadership Education for Association Professionals (LEAP) Program meets monthly. Comprised of 9 mentors and mentees. Program is designed to equip new and aspiring financial aid administrators with the resources and tools to become better leaders in our profession and provide opportunities of professional networking and involvement with FASFAA.
- 2<sup>nd</sup> Annual Statewide Director's Meeting occurred on February 10, 2021
- Designated four task forces for the year
  - Virtual Annual Conference—task force is working with the conference committee now that the conference has been moved to a virtual format
  - FASFAA P&P Appendix—work is in progress
  - Website Review/Improvement—task force will end its work on the website overhaul by the end of February 2021. Website updates being rolled out as they are completed
  - Long Range Strategic Plan—task force comprised of president, immediate past president, treasurer, bookkeeper, select members and past presidents. LRSP will be presented to board for approval in May 2021.
- Serving as a panelist for LEAP program's leadership panel on February 15, 2021
- Currently working with State of Florida (OSFA), FCAN, & community organizations to launch FAFSA virtual sessions, virtual FAFSA help session office hours on March 22 & 29, 2021
- Reviewing platforms to determine the best option for the annual conference
- Preparing to seek nominations for the first Ollicia Anderson Award
- Preparing to seek nominations for remaining FASFAA Awards
- Agreed to serve on SASFAA's Diversity Leadership Program Committee
- Formalized Sponsorship Prospectus document for Business Partners

## Katie Conrad – President-Elect

Executive Board Report  
February 2021

### ***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***

- Confirmed nominations for all elected positions for the 2021 election cycle. Positions include President-elect, Secretary, Treasurer-elect, Region Representatives 1, 3, 5.

### ***Recent Activities***

- Solicited nominations for elected positions for the 2021 election cycle. Nominations will officially close on 2/28/21. Soon after the close of nominations, the nominations committee will meet to determine the final slate of candidates. The goal is to have a dual slate for each of the 6 open positions.
- Participated in the FASFAA State-wide Directors Meeting on February 10, 2021. Co-hosted the open forum session with Region 1 Representative, Kris Hatcher.
- The Strategic Planning Task Force has been meeting regularly with consultant Stephen Hundley to prepare a 5 year plan to present to the Board and membership later this year.
- Participating on the Training Committee to plan webinars for the year and the conference curriculum.
- Attended two meetings of the LEAP program group to see the great work Jennifer Towers is doing with the mentors and mentees in the leadership program.
- Attended a meeting of the Partner Advisory Council in December to solicit feedback from our partners regarding sponsorship proposals and partner needs.
- Worked with the Budget Finance Committee to plan for budgetary changes with regard to virtual conference.

- Meet regularly with President Lovett to ensure the association is striving to meet his goals for the year and to ensure a smooth transition to 2021-2022.

## Daniel Barkowitz – Immediate Past President & Fiscal Concerns

Executive Board Report  
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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***

- Continued to work with the Budget Committee to monitor and evaluate our current income and expenses and to adjust the 2020-21 budget based on our virtual year.
- Convened the Strategic Planning Task Force with 27 members including several Past Presidents, several current Board members, several current committee members, and members for whom this is their first FASFAA committee involvement. Worked with our Strategic Planning consultant to convene the group in December, review and refine our mission, vision, values and diversity statement in January, and begin work on goals, outcomes and metrics in February. We are on task and on time for the official debut and adoption of the Strategic Plan at the June Annual Conference.
- Led an extremely successful full-day Statewide Directors of Financial Aid Meeting which drew 190 registrants (170 for the full day, and 20 for a HEERF II Update. Worked with NASFAA, OSFA, Florida BOG, and other Directors to structure the agenda, acted as emcee for the day, and managed the technical aspects of the meeting. Conducted an evaluation for the meeting as well (100% would recommend FASFAA workshop to a colleague).
- Submitted a NASFAA Gold Star Award nomination for FASFAA's Virtual Workshop series last Spring ("FASFAA Conference Goes Virtual").
- Held a FASFAA Past Presidents Advisory Council meeting.

- Completed my service as a member of the SASFAA Leadership Development Planning Committee and as a Faculty member.
- Served as a presenter for the NASFAA Leadership Conference Strategic Planning series.
- Running as a candidate for SASFAA President-Elect for 2021-22.

## Nadine Bailey – Vice President of Training

Executive Board Report  
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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**

- *Designed an in-person conference that had to be converted to virtual, with the help of the task force.*
- *Finalized a draft agenda for the annual conference to include presentations from FSA, NASFAA, OSFA, OIG and VA.*

### **Recent Activities**

- Regularly hold conference calls with the Training Committee, ensuring all Chairs are included and that updates are provided on a regular basis.
- Attend Conference committee meetings.

## Denise Asselta – Secretary

Executive Board Report  
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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***

- Sent out the minutes from the January Board Meeting
- Sent out reminders for board reports
- Compiled all board reports for the compilation report

## Eileen Brzozowski – FASFAA Treasurer

Executive Board Report  
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### ***Why am I here?***

- To serve FASFAA by managing FASFAA's financial matters and providing the Executive Board with the information they need to be good stewards of the Association's funds.

### ***Goals***

- Finalizing procedures and organizing documentation for the Treasurer and Treasurer-Elect positions.
- Meeting all regulatory reporting guidelines.
- Providing accessible and actionable financial information to the Executive Board.

### ***Accomplishments***

- Completed monthly reconciliations of checking and investment accounts.
- Produced financial statements (Balance Sheet, Profit & Loss, and Budget vs. Actual) to provide current information regarding our financial position.
- Filed bookkeeper's IRS Form 1099-NEC online for 2020.
- Per recommendation of UBS advisors, FASFAA consolidated UBS accounts from five to three in advance of UBS's change to fee structures.
- FASFAA filed fiscal year 2020 IRS Form 990 (tax return).
- Filed 2021 Florida Not for Profit Corporation Annual Report.

### ***Recent Activities***

- See above.

## Vacant – Treasurer-Elect

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**NO REPORT**

## Kris Hatcher – Region I Representative

Executive Board Report  
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### ***Why am I here?***

- Serve the financial aid administrators and students from Region I until June 30<sup>th</sup>, 2021

### ***Goals***

- Assist FASFAA by filling in for Shana Gore’s remaining responsibilities

### ***Accomplishments***

- Nominated a candidate for Region I’s 07/01/2021 to 06/30/2023 position
- Helped launch FASFAA’s new <https://www.fasfaa.org/florida-financial-aid-history> webpage

### ***Recent Activities***

- Began filling in for Shana Gore in December, 2020
- Participated in FASFAA’s strategic plan task force
- Participated in FASFAA’s LEAP program
- Participated in number training and conference committee meetings (virtual)
- Participated in 01/28/2021 FASFAA executive board meeting (virtual)

## 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 high quality training events
- Provide effective and regular communication and updates to Region II members
- Actively participate in executive board phone calls and meetings

### ***Accomplishments***

- Worked closely with Training Committee and Virtual Conference Taskforce to plan virtual Conference agenda
- Collaborated with Region Representatives and Webinar Co-Chairs to assist in planning spring 2021 training events

### ***Recent Activities***

- Actively participating on Strategic Planning Taskforce
- Currently working with Region Representatives to plan all region workshop in March
- Contacted association members to inform them of selection of their conference session proposals

## Abigail Troche – Region III Representative

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**Report Pending**

## Kimberly Gloster – Region IV Representative

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**Report Pending**

## 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.

### ***Recent Activities***

- Planning the first Spring 2021 Statewide Regions Workshop
  - Date: Friday, March 26<sup>th</sup>
- Assisting with researching virtual conference platforms
  - The group will have updates ready by next EB meeting- 2/25
- FASFAA Virtual Conference Task Force: assisting with topic selection and agenda review for FASFAA's virtual conference

## Joan Bailey – Conference Committee Chair

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**Report Pending**

## 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
- Attended two SAFAA legislative relations committee meetings where we are developing the activities of SASFAA and the state associations for the coming year.

### ***Recent Activities***

- very little legislative activity at this time and little change to meet with legislators. However, these was one large bill passed congress which will impact aid greatly in the coming years. Will be covered extensively but SULA is gone, the FAFSA is simpler, among other things. There are also a few bills in the state to keep an eye on. In particular one that might require a FAFSA or waiver for HS graduation.

## 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. The overall goal is to create a Global Issues or Diversity and Inclusion section 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 proposals for global issues interest session at the 2021 FASFAA Annual Conference.

### ***Accomplishments***

- Created and distributed a message to all FASFAA members specific to Black History Month. The message contained links to various resources to educate members or enhance their knowledge base as it relates to the contribution of African Americans to American history. The plan is to distribute additional resources throughout the month of February.

### ***Recent Activities***

- Met with two individuals who have agreed to conduct interest sessions at the 2021 FASFAA Annual Conference. I am still waiting on the session description documents to provide to the program chair.

## Laura Dickerson – Vendor/Sponsorship Coordinator

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

- To support and assist FASFAA with sponsorship 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
- Resubmitted the pivot sponsorship tiers for approval
- Working with Brenda Brown and IT support to create, finalize and Launch partner prospectus on web
- Working to create a pivot sponsor document and supporting conference committee

### ***Recent Activities***

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

## Irma Molinares – Site Selection/Event Coordinator

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

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

### ***Goals***

- Coordinate and secure meeting sites requested by EB for the activities scheduled by the association.
- Ensure and coordinate with Conference hotel that everything runs smoothly with our 20-21 Conference.
- If conference is cancelled, negotiate with Hyatt to make sure the best outcome is obtained for the association.
- Negotiate contracts in a manner that does not negatively impact FASFAA.

### ***Recent Activities***

- Due to COVID, most of the activities had to be cancelled and no in person meetings were scheduled, hotel negotiations were not needed.
- Informed Hyatt Regency Grand Cypress in Orlando, FL. that due to COVID, the 2021 Annual FASFAA Conference was moved to a virtual conference and we needed to cancel our contract with no penalties. Hyatt Regency Grand Cypress contract signed by President Barkowitz in November 2019 was cancelled and the deposit will be refunded to the association.

## Jerry McMahon – Electronic Services Chair

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

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

### ***Goals***

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

### ***Accomplishments***

- Website updates on going as changes are needed

### ***Recent Activities***

- Member assistance
- Form creation
- Website Updates

## Kimberly Lent – Early Awareness/Outreach/Financial Literacy Chair

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**Report 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 volunteer's 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***

Email blasts highlighting volunteers and requests to update membership. Assistance with resolution of paid invoices and discrepancies. Current Active Membership is at 889 with 53 new members added within the last 90 days and lapsed membership at 303. Another email will go out within the next one to two weeks after Registration opens for the FASFAA Conference urging lapsed members to update and pay for current membership and request volunteers to assist with planning and preparation for the virtual conference. Currently all volunteers are placed and hope to obtain more.

## Merrian King – Scholarship / Charity Chair

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

- To provide support to the association and serve as the Charity and Bonnie Pirkle (BP) Scholarship chair for the 2021 Conference.

### ***Goals***

- To represent the association as charity and BP scholarship chair.
- To organize and promote a successful Bonnie Pirkle scholarship raffle.
- To assist the clock hour chair and region reps with promoting the BP scholarship raffle during workshops.
- Work with Jerry and Gwyn to set-up a raffle software to be use for BP scholarship during workshop.
- Send reminder donation emails to members twice a month.

### ***Accomplishments***

- As of 2/9/2021 sent 6 emails. Donation are slowly trickling in.
- Learned how to run donation reports in memberclick.

### ***Recent Activities***

- Ran donation reports.
- Total donated \$757.00 (BP \$376.00 Charity \$381.00).

## Brenda Noblitt – Graduate/Professional

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

- Graduate/Professional/Private Committee Chair

### ***Goals***

- Provide Graduate/Professional/ Private information-based webinars to FASFAA membership
- Update to FASFAA Graduate/Professional website
- Submit Graduate/Professional/Private topic sessions for the FASFAA conference

### ***Accomplishments***

- Fall 2020-Financial Wellness Webinar
- Updates to Graduate/Professional Website

### ***Recent Activities***

- Committee is working on a spring Graduate/Professional/Private webinar.
- Submitted additional website enhancement suggestions.
- Submitted 3 proposals for Graduate/Professional/Private conference sessions

## 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.

### ***Goals***

- **Our Members**
  - Offering 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 Region Workshops and Annual 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 Annual Conference on June 1-4, 2021 by assisting the Conference Committee to find Clock Hour session presenters and moderators. Also, assist with other volunteering duties as assigned by the Conference Committee. Participate in meetings with the Training Committee on a monthly basis.

### ***Recent Activities***

- One Clock Hour Volunteer Committee email sent in February (8 volunteers on my committee).

## Louanne Standley – OSFA Liaison/Newsletter

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**Report Pending**