



FASFAA Executive Board

2023-2024

Executive Board Report

June 2024



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Elected Officers

President	Dameion Lovett
President-Elect & Nominations	Kamia Mwango
Immediate Past President & Fiscal Concerns	Nadine Bailey
Vice-President of Training	Jessica Ly
Secretary	Susan Ambridge
Treasurer	Arminta Johnson
Treasurer-Elect	Chrissy Gass

Elected Region Representatives

Region I Representative	Angelica Coonts
Region II Representative	Alisha Hunt
Region III Representative	Karissa Lawson
Region IV Representative	Merrian King
Region V Representative	Joseph Gonzales

Members At Large Appointments

Conference Chair/Member at Large	Joan Bailey
Federal and State Legislative Chair/Member at Large	Egan Hanson
Global Issues/Member at Large	Brenda Ilojirole
Vendor/Sponsorship Coordinator/Member at Large	Becky Davis
Site Selection/Event Coordinator/Member at Large	Irma Molinares
Conference Co-Chair	Christina Heritage-Acosta
Co-Site Selection/Co-Event Coordinator	Laura Dickerson

Committee Chair Appointments

Electronic Services	Eddie Schworn
Early Awareness/Outreach/Financial Literacy Chair	Ilia Cordero
Membership Chair/Volunteer Coordinator	Jody Walker
Scholarship/Charity Chair	Jonathan Reynolds
Grad/Professional (Private/For Profit/Non-Profit)	Melissa Toohey
Vocational-Technical/Clock Hour	Jeanne Schurman
OSFA Liaison	Shawn Haskin

FASFAA Support

Bookkeeper	Gwyn Francis
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Executive Board Report June 2024

Dameion Lovett
President

Committee Members (Name and Institution/Company):

- President-Elect/Nominations, Kamia Mwango, Santa Fe College (V)
- Past President/Fiscal Concerns, Nadine Bailey, Ultimate Medical Academy (V)
- Vice-President of Training, Jessica Ly, Florida International University (V)
- Secretary, Susan Ambridge, Valencia College (V)
- Treasurer, Arminta Johnson, Lake-Sumter State College (V)
- Treasurer-Elect, Chrissy Gass, Florida Atlantic University (V)
- Region I Representative, Angelica Coonts, Pensacola State College (V)
- Region II Representative, Alisha Hunt, Santa Fe College (V)
- Region III Representative, Karissa Lawson, University of Central Florida (V)
- Region IV Representative, Merrian King, St. Petersburg College (V)
- Region V Representative, Joseph Gonzales, University of Miami (V)
- Conference Chair, Joan Bailey, University of South Florida-Health (V)
- Vendor/Sponsorship Chair, Becky Davis, Ascendium Education (V)
- Site Selection Chair, Irma Molinares, College Aid Services (V)
- Federal/State Legislative Chair, Egan Hanson (V)
- Global Issues Chair, Brenda Ilojirole, Valencia College (V)
- Co-Site Selection, Laura Dickerson, Sallie Mae
- Conference Co-Chair, Christina Acosta-Heritage, Southeastern University
- Electronic Services, Eddie Schworn, Florida International University
- Early Awareness/Outreach/Financial Literacy Chair, Ilia Cordero, Valencia College
- Graduate/Professional Chair, Melissa Toohey, University of South Florida-Health
- Vocational/Technical/Click Hour Chair, Jeanne Shurman, Hillsborough Community College
- Florida Office of Student Financial Aid Liaison, Shawn Haskins, Florida Dept. of Education
- Bookkeeper, Gwyn Francis, FASFAA Lifetime Member
- Special Projects & Webinars, Angelica Parrales, Valencia College

Committee Goals:

1. Increase FASFAA's participation in supporting the Florida College Access Network to help high school students successfully complete the FAFSA. In order to successfully complete this task, FASFAA will provide financial aid training for high school guidance counselors to assist in their preparation of college bound seniors in the financial aid process.
2. Increase membership and facilitate the participation of members as volunteers
3. Continue promotion of the pipeline of members who can serve on committees to help further the completion of goals throughout the year

Policy & Procedure: Changes/ Recommendations:

1. Updates in progress to Reconciling Bank Statements (Financial Information) section of the P&P based on audit findings
2. Updated references to vendor/sponsors in P&P manual to Business Partners

Motion/Action Item(s):

- N/A

Summary of Recent Activities

- Reviewing audit documents with auditor, treasurer and bookkeeper
- Reviewing audit recommendations with FCC
- Reviewing 2024 conference hotel bill with site selection committee
- Prepared summer newsletter. Scheduled to be sent on 6/24/24
- Participated in SASFAA virtual board meetings; preparing final report for SASFAA transition meeting in July

Accomplishments

- Review of board job titles and descriptions completed by Angelica Parrales and are as follows:

Conference Chair/Member at Large:

The chair is responsible for the planning and coordination of all training, professional development and networking activities held in conjunction with the association's annual conference.

Duties include but not limited to:

- Attending board meetings.
- Collaborate with other board members for conference curriculum.
- Collaborate with site coordinator to ensure conference site and stipulations are meeting approved P&P standards.
- Organize committee members such as the Conference Chair, Facilities Chair, the Local Arrangements Chair, Registration Chair, and the Curriculum Coordinator. Ex-officio members include the President, the VP Training, the Electronic Services Chair,

the Membership Chair, the Vendor / Sponsorship Chair, the Scholarship / Charity Chair, Site Selection Chair, the Treasurer, and the Bookkeeper.

- Notify and update members regarding the conference and what to expect.

Federal and State Legislative Chair/Member at Large:

The chair is responsible for monitoring and keeps the membership informed of the status of all federal financial aid programs, including funding, and proposed legislative and regulatory changes. They also encourage and influence the membership to respond to regulatory and legislative initiatives through communication with legislators.

Duties include but not limited to:

- Monitoring the status of all federal financial aid programs, including funding, and proposed legislative and regulatory changes.
- Keeping the membership informed of the status of federal aid programs through e-mails, newsletter reports, special reports, telephone calls or other such means as the chairperson deems appropriate.
- Encouraging the membership to respond to regulatory and legislative initiatives.
- Providing advice on how to influence the legislative process through communication with legislators and other officials involved in legislative affairs.
- Choose members for a committee.
- Attend board meetings.
- Perform other duties or complete special projects as assigned.

Early Awareness/Outreach/Financial Literacy Chair:

The chair is responsible for coordinating activities to empower college students for success by providing early access to available financial resources and by instilling effective money management skills. A commitment to creating college partnerships and community outreach opportunities to increase FAFSA awareness and timely completion, to spread Financial Literacy, and to promote responsible stewardship across Florida's post-secondary institutions.

Duties include but not limited to:

- Work with Regional Representatives in the coordination of Financial Aid Awareness Week, and make sure that this week is under gubernatorial proclamation.
- Send a FASFAA introductory letter to guidance counselors and civic groups throughout Florida.
- The chair should obtain a schedule of college nights throughout the state and the contact person. This information should be distributed to the Regional Reps to arrange FASFAA coverage.
- Assist in coordination of activities during Financial Aid Awareness Week.
- Coordinate with OSFA Liaison to send out updated publications.

- Choose members for committee.
- Attend board meetings.
- Perform other duties or complete special projects as assigned.

Global Issues/Member at Large Coordinator:

The chair is responsible for enhancing the inclusivity of its membership to reflect the demographic of the student population we serve. In addition to increasing diverse membership and participation, the chair will also be responsible for engaging members in thoughtful interactions regarding inclusivity, informing the general membership of the concerns and issues of diverse members, and ensuring diverse representation on the various FASFAA committees and offices.

Duties include but not limited to:

- Increase diverse membership and participation.
- Engage members in thoughtful interactions regarding inclusivity.
- Informing the general membership of the concerns and issues of diverse members.
- Ensuring diverse representation on various FASFAA committees and offices.
- Choose members for committee.
- Attend board meetings.
- Perform other duties or complete special projects as assigned.

Grad/Professional Chair (Private/For Profit/Non-Profit):

Graduate/Professional Chair is responsible for providing support to the graduate and professional financial aid community.

Duties include but not limited to:

- Assist the community in serving students.
- Build and strengthen the network of graduate and professional financial aid administrators in Florida.
- Define the graduate and professional sector(s) and their needs.
- Prepare a plan to achieve the Committee's purpose.
- Work with the Annual Conference and Training Committees to ensure that graduate and professional interests are represented during the training sessions where appropriate.
- Collaborate with webinar chair to hold networking opportunities.
- Choose members for committee.
- Attend board meetings.
- Perform other duties or complete special projects as assigned.

Membership Chair/Volunteer Coordinator:

Membership chair is responsible for welcoming all new FASFAA members at all FASFAA events including Regional Workshops, New Aid Officer Training and the annual Conference.

Duties include but not limited to:

- Plan the new member reception at the yearly conference.
- Staff the new member welcome table and greet new members.
- Welcome new members at region workshops to talk about FASFAA and explain how to get involved with the association.
- Maintains the FASFAA membership database for accuracy, completion, and elimination of duplicate records.
- Assigning new and renewed members to the appropriate groups/regions.
- Process memberships paid online (PayPal).
- Print and mail membership certificates as requested.
- Respond to questions from the membership regarding membership status, username and passwords and other general inquiries.
- Sending a renewal notice to all members.
- Responding to requests for applications to join the Association.
- Soliciting membership from individuals whose institutions have not previously participated in FASFAA.
- Maintaining all membership records and information.
- Reconciling the number of paid members with the records maintained by the bookkeeper.
- Prepare one e-mail blast per year to non-members of FASFAA, soliciting their membership.
- Referring the names of non-renewals to the Regional Representatives for follow-up.
- Facilitation of volunteer recruitment, organization, and mobilization.
- 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.
- Facilitation of approved volunteer appreciation events.
- Attend board meetings.

Scholarship/Charity Chair:

Charity and Scholarship Chair is responsible for supporting our students through the Bonnie Pirkle Scholarship Program and supporting our Annual Conference Charity.

- Fundraising activities during the entire year for the Bonnie L Pirkle Memorial Scholarship.
- FASFAA established the scholarship program as a commitment to help deserving student benefit from higher education.
- Responsibility for supporting the charity selected for the Annual Conference.
- Coordinating events (like raffles, silent auctions, and other activities) to raise funds to support the charity.

Vendor/Sponsorship Coordinator/Member at Large:

The Vendor/Sponsor chair serves as a liaison between vendors supporting FASFAA and the Conference Committee.

- Promote participation at events.
- Coordinate conference vending area for maximum visibility.
- Collaborate to keep vendors engaged during conference events.
- Promotional opportunities for vendors and sponsors
- Seek opportunities for vendors and sponsors to engage with financial aid professionals through focused workshops.
- Coordinate logistical support for vendors at the annual conference.
- Potential future opportunities may include coordination with Electronic Services (for website support), Webinars and Newsletter (for promotional opportunities).
- Work closely with each conference program chairperson to see that the programs provide an adequate opportunity for the sponsorship community to participate in each conference.
- Attend board meetings.

Vocational-Technical/Clock Hour Coordinator:

The Vocational-Technical/Clock Hour Coordinator will assist with the annual FASFAA Clock Hour Workshop and the annual FASFAA conference.

Duties include but not limited to:

- Gather session topics from the membership for vetting purposes.
- Plan and Coordinate clock hour workshop.
- Choose member for the committee who will assist in planning of the workshop.
- Moderator at the Clock Hour sessions at the annual FASFAA conference.
- Foster opportunities to network with schools within the Clock Hour sector.

Site Selection/Event Coordinator/Member at Large:

The site coordinator is responsible for recommending sites for conferences and negotiating contracts with the facilities selected.

Duties include but not limited to:

- Recommending sites for conferences.
- Negotiating contracts with the facilities selected.
- Choose members for the committee who will assist in coordinating site selections.
- See Policy and Procedures for in depth detail of responsibilities on site selections.
- Attend board meetings.

OSFA State Liaison:

The OSFA liaison monitors and keeps the membership informed of the status of all state financial aid programs, including funding, and proposed legislative and regulatory changes. They also encourage and influence the membership to respond to regulatory and legislative initiatives through communication with legislators.

Duties include but not limited to:

- Monitoring the status of all state financial aid programs, including funding, and proposed legislative and regulatory changes.
- Keeping the membership informed of the status of state aid programs through e-mails, newsletter reports, special reports, telephone calls or other such means as the chairperson deems appropriate.
- Encouraging the membership to respond to state regulatory and legislative initiatives.
- Providing advice on how to influence the state legislative process through communication with legislators and other officials involved in legislative affairs.
- Attend board meetings.
- Perform other duties or complete special projects as assigned.



Executive Board Report June 2024
Kamia “Mia” Mwango
President-Elect & Nominations

Nominations Committee:

- **Committee Members: (Region Representatives)**
 - Region I Representative Angelica Coonts Pensacola State College
 - Region II Representative Alisha Hunt Santa Fe College
 - Region III Representative Karissa Lawson University of Central Florida
 - Region IV Representative Merrian King St. Petersburg
 - Region V Representative Joseph Gonzales University of Miami
- **Nominations Committee Goal:** Prepare nominations slate for 24-25 Board elections.

Strategic Plan Taskforce:

- **Strategic Plan Taskforce Members:** David Alexander, Marie Guerra-Rosado, Egan Hanson, Brenda Ilojirole, Mia Mwango
- **Strategic Plan Taskforce Goals:** Review FASFAA Strategic Plan for upcoming year (completed 2/8/24)

Policy & Procedure: Changes/ Recommendations: N/A

Motion/ Action Item(s): N/A

Summary of Recent Activities

- Networking with business partners for new and continued collaboration to bring info/collaboration to members (VerityIQ, Dexian, Red Kite, Modern Campus, Nelnet, Transact, Regent, Workday, NextGen, etc.)
- Cultivating agency partnerships, plan to continue (NACUBO, Registrars, TRIO, Take Stock, FCAN, etc.)
- Attending committee meetings, getting info for next-year’s role, site selection reviews for next year.

Accomplishments

- Strategic Plan Taskforce Review 2/8/24, Summary Document submitted to Executive Board (See attached).
- Presented at Region II Workshop Fri 4/12/24, 8:30am – 4:00pm

- *Presented at MASFAA (MS State) Conference as part of SASFAA State President-Elect Exchange 4/24/24-4/26/24.*
- *Nominations Committee presented dual slate for successful 24-25 FASFAA Board elections (Thank you for your help everyone!).*
- *Invitation letters emailed to incoming 24-25 FASFAA elected and appointed Board.*



Executive Board Report June 2024
Nadine Bailey
Immediate Past President & Fiscal Concerns

Committee Members (Name and Institution/Company):

Fiscal Concerns Committee

- Dameion Lovett, USF
- Arminta Johnson, Lake Sumter
- Becky Davis, Ascendium
- Chrissy Gass, FIU
- Mia Mwango, Sante Fe College
- David Alexander, ECPI
- Gwyn Francis, FASFAA Bookkeeper
- Nadine Bailey, UMA

Committee Goals:

- The Fiscal Concerns Committee shall advise the Executive Board of Directors on all financial matters. The Fiscal Concerns Committee is chaired by the Immediate Past President and should meet at the time of, or prior to, the Transition Meeting of the Executive Board to prepare a tentative budget to present to the Executive Board at their first meeting of the fiscal year.
- The Fiscal Concerns Committee shall schedule an annual audit of the financial records of the corporation as outlined in the audit procedures.

Policy & Procedure: Changes/ Recommendations:

N/A.

Motion/ Action Item(s):

N/A.

Summary of Recent Activities

- Helped with the set up for the annual conference.
- Volunteered to work the registration desk at the conference.
- Moderated a pre-conference session.

Accomplishments

This year, I believe I have served this board to the best of my ability. I have offered input, suggestions and am always willing to help to ensure FASFAA's continued success. I have supported President Lovett along the way and will continue to do what is asked of me in service of FASFAA.



Executive Board Report June 2024
Jessica Ly
Vice President of Training

Committee Members (Name and Institution/Company):

Title	First Name	Last Name	Institution
New Aid & Intermediate Officer	Kylie	Gross	University of Tampa
Webinar Coordinator	Angelica	Parrales	Valencia College
Director's Summit	Tierra	Smith	Hillsborough Community
Region I Representative	Angelica	Coonts	Pensacola State College
Region II Representative	Alisha	Hunt	Lake Sumter State College
Region III Representative	Karissa	Lawson	University of Central Florida
Region IV Representative	Merrian	King	Keiser University
Region V Representative	Joseph	Gonzales	University of Miami
Vocational-Technical/Clock Hour Chair	Jeanne	Shurman	Hillsborough Community
Early Awareness/Outreach/Financial Literacy Chair	Ilia	Cordero	Valencia College
Grad/Professional Chair	Melissa	Toohey	USF Health
LEAP Coordinator	Colin	Brenner	Santa Fe College
LEAP Coordinator	Tiffany	Ireland	University of Florida
Global Issues Chair	Ilojirole	Brenda	Bethune Cookman University

Committee Goals:

- To provide a wide variety of training opportunities to all FASFAA members. The aim is to help financial aid administrators understand all changes related to FAFSA simplification and to navigate the best ways to apply such changes.
- Continue to provide trainings related to processing financial aid, reconciling, compliance, and managing federal and state funds.
- To engage and connect our members with resources and a network of financial aid professional across the state of Florida.
- To be receptive to the needs and wants of our members and to stive to meet their requests.

Policy & Procedure: Changes/ Recommendations: None.

Motion/ Action Item(s): None.

Summary of Recent Activities

- Developed 2024 conference program, including finding presenters and creating session topics and session descriptions.
- Communicated with all conference presenters regarding conference logistics.
- Worked with Conference Committee and Chairs to finalize all other pending conference tasks.
- Continued to support all training activities as needed including webinars and some of the pre-conference events.

Accomplishments:

As a committee, we met monthly to plan FASFAA training events, successfully offered monthly webinars to members, hosted in-person region workshops, raised funds for Bonnie P. Scholarships and The Homeless Coalition, hosted the Clock-Hour Workshop and the New and Mid-Level Officer Workshop, and developed a robust conference program.



Executive Board Report June 2024
Susan Ambridge
Secretary

Committee Members (Name and Institution/Company): Served on the Clock Hour Committee.

Committee Goals: Assisted Jeanne Shurman and the committee with anything needed for the workshop.

Policy & Procedure: Changes/ Recommendations:

Recommendation:

Email address specifically for the FASFAA Secretary position. The reason would be to keep all email records together from the Executive Board.

Motion/ Action Item(s): N/A.

Summary of Recent Activities:

- Obtained final Executive Board Reports.
- Distributed information to membership for the FASFAA Business Meeting.
- Moderated for a session at FASFAA Conference.
- Concluded second year as a LEAP mentor.

Accomplishments:

Same as recent activities above.



Executive Board Report June 2024
Arminta Johnson
Treasurer

Committee Members:

Fiscal Concerns committee headed by the past president, Nadine Bailey

Goals:

To keep FASFAA financial records up to date. Coordinate with Bookkeeper, financial institutions, Accountant, Executive Board, and Treasurer-elect.

Policy & Procedure: Changes/ Recommendations:

Completed bank reconciliation process section for policy and procedure manual

Motion/ Action Item(s): None

Summary of Recent Activities

- 23-24 Bank Reconciliations
- Collecting registrations and other donations at the FASFAA conference. Funds accounted, and deposited into bank.
- Worked with accountant to complete the 22-23 Financial Audit and submit tax documents.
- Reimbursements for conference expenses for Board members.
- Year end account transition to new treasurer.

Accomplishments: N/A.



Executive Board Report June 2024
Chrissy Gass
Treasurer Elect

Committee Members (Name and Institution/Company):

N/A

Committee Goals:

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Motion/ Action Item(s):

N/A

Summary of Recent Activities

Attend Conference, assisted with set up as directed.

Met with current Treasurer to review procedures.

Accomplishments

Present two sessions at conference, moderated one session.



Executive Board Report June 2024
Angelica Coonts
Region I Representative

Committee Members (Name and Institution/Company):

Training Committee- FASFAA

- Alisha Hunt- Santa Fe College
- Angelica Coonts- Pensacola State College
- Angelica Parrales- Valencia
- Becky Davis- Ascendium Education
- Brenda Ilojiole- Valencia
- Collin Benner- Santa Fe
- Edward Schworn- Florida International University
- Ilia Codero- Valencia
- Jeanne Schurman- Hillsborough Community College
- Jessica Ly- Florida International University
- Joseph Gonzales- University of Miami
- Karissa Lawson- University of Central Florida
- Katie Conrad- Florida International University
- Melissa Toohey- University of South Florida
- Nadine Bailey- Ultimate Medical Academy

Committee Goals:

- Training Committee- To provide educational opportunities for FASFAA members through Workshops, webinars, and conference sessions.

Policy & Procedure: Changes/ Recommendations:

- None currently.

Motion/ Action Item(s):

- None currently.

Summary of Recent Activities

- Attended the 2023-2024 FASFAA Annual Conference.
- Participated in meetings that discussed potential growth opportunities for membership within FASFAA.
- Met with Region I members to discuss the needs and wants of Region I membership.

- Provided the Region I Charity Basket to the annual conference.

Accomplishments

- Earned Student Eligibility NASFAA Credential.
- Moderated 2 presentations at the FASFAA conference.
- Volunteered at the Registration table.



Executive Board Report June 2024
Alisha (Hunt) McCray
Region II Representative

Committee Members (Name and Institution/Company):

N/A

Committee Goals:

N/A

Policy & Procedure: Changes/ Recommendations:

None

Motion/ Action:

None

Summary of Recent Activities:

Region II Spring Workshop successfully completed on April 12, 2024

Accomplishments:

- ❖ Completed my term as the Region II Representative. I loved being a part of FASFAA and looking forward to my next opportunity to become more involved in a different role.
- ❖ Recruit volunteers into FASFAA.
- ❖ Provide at least one NASFAA credential training workshop every year.
- ❖ Provide the highest quality of assistance to Region II members and non-members.
- ❖ Communicate with Region II often and purposefully.
- ❖ Actively participate in Board Member Calls and Meetings.
- ❖ Continue to support FASFAA in all the association's goals and activities.



Executive Board Report June 2024
Karissa Lawson
Region III Representative

Committee Members (Name and Institution/Company):

Sarnya Risselin and University of Central Florida
Melanie Ramos Melendez and University of Florida

Committee Goals:

Assist with the Region III Meeting at the Conference

30 attendees

Policy & Procedure: Changes/ Recommendations:

N/A

Motion/ Action Item(s):

N/A

Summary of Recent Activities

Conference - Region III Meeting – May 23, 2024
Conference - 1 Presenter – Region III Updates
Conference - Region III Raffle Basket
Bonnie L. Pirkle Memorial Scholarship – Jeremy Ayuk-Takem
Bonnie L. Pirkle Memorial Scholarship – Chante Wallace

Accomplishments

Preconference - R2T4 Credential – Presenter
Preconference – LEAP Leadership Panel Q & A – Panelist
Conference – Financial Jeopardy – Moderator
Region III Raffle Basket – Most tickets purchased.
Vice President Election Result – Amethyst Castro UCF – Region III Member
Treasure Elect Election Result – Sedrick Brinson UCF – Region III Member



Executive Board Report June 2024
Merrian D King
Region IV Representative

Committee Members:

N/A.

Committee Goals:

N/A.

Policy & Procedure: Changes/ Recommendations:

N/A.

Motion/ Action Item(s):

N/A.

Summary of Recent Activities

- Organized an in-person spring workshop at St Petersburg College on April 5, 2024.
- Sent an email to region IV members, reminding them of the conference encouraged them to donate to the charity and Bonnie Pirkle scholarship. Also, invited all attendees to the Region IV meeting and suggested wearing our region color.
- Attended the Annual Conference in Charlotte Harbor.
- Created the Region IV basket for the annual conference
- Hosted the region IV session at the conference., encouraged member to volunteer or run for a position in FASFAA. Also, encouraged them to donate to the charity and Bonnie Pirkle scholarship.

Accomplishments

- Filling in as Region IV representative.
- Assisted with an online fall workshop with other region representatives.
- Hosted a successful Region IV spring workshop with 35 members attendees.
- Designed and created the annual conference program with Joan and Dameion.
- Contributed to FASFAA's achievement of this year goals.
- Provide training for Region IV members.
- Assist with any necessary duties.
- Maintained communicate with Region IV member.

Pictures

Spring Workshop



Region IV Baskets



Region IV Session at Conference





Executive Board Report June 2024
Joseph Gonzales
Region V Representative

Committee Members (Name and Institution/Company):

N/A

Committee Goals:

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Motion/ Action Item(s):

N/A

Summary of Recent Activities

- *Preparing to attend Transition Meeting at the end of June.*
- *Starting to Plan for Fall 2024 and Spring 2025 workshops.*
 - *Working on Tentative dates.*
 - *Traci Spagnoli-Rego has offered Broward College as a host for the workshops.*
 - *Looking to expand the pool of presenters representing more schools in the region.*
- *Planning to attend Training Committee Meeting scheduled on 6/13/24.*

Accomplishments

- *Fall workshop held on 12/8/2023 at Broward College – A. Hugh Adams Central Campus.*
 - *Agenda: Verification Presentation by Anh Do (UM), SAP Credential Training by Jordan Pulido (FIU), Student Financial Wellness by Chris Magnan (UM)*
 - *Fifteen members submitted to NASFAA for the SAP credential test. (Both UM and FIU have purchased the Unlimited Professional Credentials Package through NASFAA affecting the number who opted in to the roster)*
 - *Fifty-one pre-registered, two walkups day of, and ten no-shows.*
 - *Donations to Bonnie Pirkle Scholarship Fund: \$150.00*
- *Spring workshop held on 4/26/2024 at Broward College – A. Hugh Adams Central Campus.*

- *Agenda: COA Refresher & What We Know (& Don't Know) About Verification for 24-25 Presentation by Anh Do (UM), State Aid Presentation & Discussion by Frances Arcay and Debbie Valencia (UM), Self-Care in the Wake of FAFSA "Simplification" Presentation by Joseph Gonzales (UM)*
- *Fifty-four persons registered for the workshop, there were nine no shows.*
- *Donations to Bonnie Pirkle Scholarship Fund: \$120.00*
- **2024 FASFAA Conference**
 - *Attended Directors Summit*
 - *Encouraged UM attendees to volunteer at the conference.*
 - *Frances Arcay assisted at the Registration Desk.*
 - *All UM staff members attending conference assisted setting up the Hospitality Suite.*
 - *Session Panelist: Administration of Aid Programs: Awarding, Reconciliation, & Cash Management – Jennifer Rivera (FIU), Patricia McSparin (Broward College), Joseph Gonzales (UM), Moderated by Traci Spagnoli (Broward College)*
 - *Financial Aid Jeopardy – Kathleen Roebuck (Monogram), Joseph Gonzales (UM), Moderated by Karissa Lawson (UCF)*
 - *Hosted Region V Meeting – approximately fourteen attendees from the region.*
 - *Delivered Region V Charity Gift Basket – Mangia, Mangia Italian Food Crate.*



Executive Board Report June 2024
Joan Bailey/Christina Heritage
Conference Chair/Co-chair

Committee Members (Name and Institution/Company):

President	Dameion	Lovett	University of South Florida
President-Elect & Nominations	Kamia	Mwango	Santa Fe College
Conference Chair/Member at Large	Joan	Bailey	University of South Florida-Health
Conference Co-Chair	Christina	Acosta-Heritage	Southeastern University
Local Arrangements	Traci	Spagnoli	Broward University
2025 Conference Chair			
Program Chair	Jessica	Ly	Florida International University
Conference Website Coordinator	Brenda	Brown	College Aid Services
Treasurer	Arminta	Johnson	Lake Sumter State College
Treasurer-Elect	Chrissy	Gass	Florida Atlantic University
Bookkeeper	Gwyn	Francis	
Membership Chair (Co-Registration Chair) Volunteer Coordinator	Jody	Walker	Southeastern University
Co-Registration Chair/Pre-Conference	Tracy	Wiles	University of Tampa
Electronic Services	Eddie	Schworn	Florida International University
Scholarship/Charity Chair	Jonathan	Reynolds	Ultimate Medical Academy
Global Issues/Member at Large	Brenda	Ilojirole	Bethune Cookman University
Site Selection/Event Coordinator/Member at Large	Irma	Molinares	College Aid Services
Co-Site Selection/Co-Event Coordinator	Laura	Dickerson	Sallie Mae
Vendor/Sponsorship Coordinator/Member at Large	Becky	Davis	Ascendium Education
Director's Summit	Tierra	Smith	Hillsborough Community College

Committee 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 2024 annual conference.

Policy & Procedure: Changes/ Recommendations: None.

Motion/ Action Item(s): None.

Summary of Recent Activities:

- The final hotel bill is still outstanding, and we will provide an update soon.
- Conference Survey was sent to all Director Summit and General Conference Attendees. we are sending a reminder to complete by Friday, June 28th and we will provide on the survey results soon.

Accomplishments

- We are pleased to report that the recent FASFAA Annual Conference was highly successful. Attendees provided overwhelmingly positive feedback, particularly highlighting the exceptional location as a significant factor contributing to their overall satisfaction. The event's success is attributed to the active participation and enthusiasm of all the conference committee members and attendees.
- We ended with a total of 280 attendees: 59 Director Summit attendees, 14 NASFAA Credentials Pre-conference attendees and 267 General Attendees. This is higher compared to last year Annual Conference attendees.



Executive Board Report June 2024
Egan Hanson
Federal and State Legislative Chair

Committee Members (Name and Institution/Company):

N/A.

Committee Goals:

N/A.

Policy & Procedure: Changes/ Recommendations:

N/A.

Motion/ Action Item(s):

N/A.

Summary of Recent Activities

- Periodic email to membership to include recent changes, SASFAA updates, opportunities to comment on items published in the Federal Register
- Participating in SASFAA Legislative Committee to evaluate needs of States and increase benefits/tools available.

Accomplishments

- Periodic email to membership to include recent changes, SASFAA updates, opportunities to comment on items published in the Federal Register
- Website updates



Executive Board Report June 2024
Brenda Ilojirole
Global Issues Chair/Leap Chair/Member at Large

Committee Members (Name and Institution/Company):

Colin Benner- Santa Fe College
Tiffany Ireland- University of Florida

Committee Goals:

Global issues: The Global Issues Committee plays a vital role in bridging communication between the Executive Board and the ever-changing global issues. By fostering greater multicultural participation and membership, the Committee aims to establish a dynamic and interactive community among members. Additionally, the Committee is responsible for keeping the general membership informed of various concerns and issues related to multiple aspects of our financial aid profession.

LEAP: LEAP is a comprehensive initiative that combines insightful readings, engaging peer discussions, hands-on learning activities, and personalized mentorship. The goal is to equip emerging leaders in the financial aid industry with the skills, abilities, and experience they need to succeed and thrive.

Policy & Procedure: Changes/ Recommendations:

No changes or recommendations.

Motion/ Action Item(s):

No motions or action items

Summary of Recent Activities:

Global Issues: All calendars are up to date and have been uploaded to the FASFAA website. Members have been made aware of the diversity opportunities offered through SASFAA (SASFA DLP program, NASFAA DLP Program)

LEAP: Nine mentees and mentors were selected to participate in the program. All members have successfully graduated from the program and the ceremony was held in person during the 2024 FASFAA Annual Conference.

Accomplishments:

- Global issues are up to date with posting.
- I am extremely proud of Colin and Tiffany for their excellent leadership skills and taking on the LEAP program.



Executive Board Report June 2024
Becky Davis
Vendor/Sponsorship Coordinator/Member at Large

Committee Members (Name and Institution/Company):

N/A

Committee Goals:

N/A

Policy & Procedure: Changes/ Recommendations:

Add to our P&P that any business attending the conference must pay the minimum amount of \$500 if they choose to not vend and just want to attend the conference.

Motion/ Action Item(s):

N/A

Summary of Recent Activities

- Increase vendor support by increasing current vendor levels as well as adding vendors.
- Finalized the list of vendors that attended the 2024 conference.

Accomplishments

Met goal by adding two gold vendors, and one additional platinum sponsor to total three platinum sponsors.



Executive Board Report June 2024
Laura Dickerson and Irma Molinares
Co-Site Selection/Co-Event Coordinator

Committee Members (Name and Institution/Company):

Irma Molinares

Committee Goals:

Site Selection co-chair. Goal was to shadow and assist the chair Irma Molinares with Site Selection and understand the site selection process and procedures that follow.

Policy & Procedure: Changes/ Recommendations:

N/A.

Motion/ Action Item(s):

N/A.

Summary of Recent Activities

Spent the year working to understand the site selection process through shadowing current chair.

Accomplishments

- Completed 2025 annual conference contract.
- Completed June Transition meeting contract.



Executive Board Report June 2024
Edward Schworn
Electronic Services Chair

Committee Members (Name and Institution/Company):

N/A.

Committee Goals:

N/A.

Policy & Procedure: Changes/ Recommendations:

None

Motion/ Action Item(s):

None

Summary of Recent Activities

We recently completed our 2024 Annual Conference.

The Spring region workshops took place from March 8th to April 26th.

Accomplishments:

I was finally able to create a custom domain for the OneDrive so that the login is now fasfaa@fasfaa.org. I've also added the ability for members to print a membership card on their member landing page.

Accurately maintained the FASFAA website and assisted with any A/V needs during workshops and/or conferences. To also inventory & track all FASFAA electronic equipment along with any software licenses that FASFAA has purchased.



Executive Board Report October 2023
Ilia Cordero
Early Awareness/Outreach/Financial Literacy Chair

No Report Submitted.



Executive Board Report June 2024
Jody Walker
Membership Chair/Volunteer Coordinator

Committee Members (Name and Institution/Company):

Josh Breed, Southeastern University
Coressa Reed - Florida State University
Traci Spagnoli Reno - Broward College

Committee Goals:

- *Move lapsed profiles to the prospect category after 1 year has passed following the expiration of their membership - complete*
- *Delete member profiles if they've been in the prospect category longer than 4 years - complete*

Policy & Procedure: Changes/ Recommendations:

- *Moving lapsed profiles to the prospect category and deleting "stale" member profiles should be an automated and ongoing process from year to year.*
- *More Memberclicks/platform training should be provided for new EB membership chair.*

Motion/ Action Item(s):

Summary of Recent Activities

Accomplishments

Filled 50/54 slots for the registration desk at the annual conference with 23 volunteers. Huge thanks to the Executive Board for stepping up and filling some of the difficult spots!

Facilitated Networking event for new members/first-time attendees at the annual conference, connecting numerous (I didn't count!) FAAs.



Executive Board Report June 2024

Jonathan Reynolds
Scholarship/Charity Chair

Committee Members (Name and Institution/Company):

Jonathan Reynolds – Ultimate Medical Academy

Committee Goals:

- Raise awareness of and support for the Bonnie Pirkle Scholarship Program and our selected charity of the year, the Charlotte County Homeless Coalition (“CCHC”).
- Our goal was to raise \$1500 in funds and nonperishable food items for the Homeless Coalition at workshops throughout the year and at the annual conference.
- Our goal was to raise \$2,000 in funds for the Bonnie Pirkle Scholarship Program at workshops throughout the year and at the annual conference.

Policy & Procedure: Changes/ Recommendations:

N/A

Motion/ Action Item(s):

N/A

Summary of Recent Activities

- Organized and operated the scholarship/charity table at the annual conference.
- Delivered food pantry items to the charity following the annual conference.

Accomplishments

Collected \$270 in food pantry donations for the CCHC
Charity Collections

- \$392 pre-conference
- \$1,522 at conference
- \$1,000 FASFAA contribution

Bonnie Pirkle Collections

- \$740 pre-conference
- \$568 (\$284 for 50/50) at conference
- \$ 1090 in T-Shirt collections
- Adjusted Collections: 52.65% of budget



Executive Board Report June 2024
Melissa (Toohey) Frimpong
Grad/Professional (Private/For Profit/Non-Profit)

Committee Members (Name and Institution/Company):

Amber Vera -USF Health
Deepika Vermagiri – USF Health

Committee Goals:

None, in transition to the new executive board.

Policy & Procedure: Changes/ Recommendations:

None.

Motion/ Action Item(s):

None.

Summary of Recent Activities:

Participated in the annual conference, served as an instructor for the NASFAA Student Eligibility certification. Preparing for a successful transition to new chair.

Accomplishments:

Had a successful year as an executive board member. Enjoyed serving for two years in a row and look forward to serving in the future.



Executive Board Report June 2024
Jeanne Schurman, EdD
Vocational-Technical/Clock Hour Chair

Committee Members (Name and Institution/Company):

Angela Nickel – Florida State College Jacksonville
Danelle Browning – Indian Rivers Schools
Kim Phillips – St. Petersburg College
Susan Ambridge – Valencia College
Teriann Wright – Orange County Public Schools

Committee Goals:

- To present a cohesive Clock Hour Workshop and meet the training needs of the clock hour community (both statewide and nationally).
- Meet, or exceed, the budgeted number of attendees.
- Come in under expenses budget.
- Offer additional webinars throughout the year.
- Offer support to all regions for clock hour related topics.

Policy & Procedure: Changes/ Recommendations:

- Have a Policy & Procedures written for the workshop including a “check list” of items to address and complete prior to the workshop as well as immediately thereafter.
- Collaborated with 2023 FASFAA President to create the P&P for FASFAA Clock Hour Workshop

Motion/ Action Item(s):

At the Spring 2024 Executive Board meeting, motion and action was taken to adopt the new P&P for the Clock Hour Workshop/Chair

Summary of Recent Activities

- Had first committee meeting via Teams to chat about sessions.
- Initiated registration for all FASFAA listserv members, FASFAA clock-hour listserv members, FASFAA Director listserv members.
- Reached out to Federal Trainers for possible webcast sessions.
- Reached out to SASFAA President to have announcement made to the SASFAA community.
- Submitted Clock-hour workshop information to NASFAA to be posted.
- Reached out to clock-hour committee (via email) regarding NASFAA certification.
- Reached out to Shawn Haskins at OSFA about presenting a state information session.

- Reached out to three FASFAA partners to possibly present at the workshop.
- Reached out to Jonathan Reynolds about putting together a presentation for the Bonnie Perkle Scholarship.
- Set up April 23, 2024, at 2:00pm for SAI and FAFSA Simplification for Clock Hour program webinar.
- Preparation for FASFAA conference Clock Hour presentation.

Accomplishments

- Initiated the registration for the Clock-Hour Workshop.
- Committee decided on “draft” sessions for the workshop.
- Secured Federal Trainers for two sessions on Tuesday, November 7, 2023
- Had announcement made to SASFAA members about the clock hour workshop.
- Clock-Hour workshop is now posted on the NASFAA Event Calendar
- Committee decided on COA NASFAA certification for one of the clock hour sessions.
- Secured Scott Haskins at OSFA for a session.
- Secured two FASFAA Partners (Campuslvy and College Aid Serve) to present two sessions.
- To date, we have 94 registrants (29 still pending full payment or membership payment)
- Final number of attendees at the 2023 FASFAA Clock Hour Workshop was 94.
- Presented SAI for Clock Hour at the Region I, II, IV combined webinar.
- Represented FASFAA at the SASFAA conference presenting a Clock Hour session.
- Held a Clock Hour Webinar on April 23, 2024, at 2:00pm for SAI and FAFSA Simplification for Clock Hour programs. Had a total of 103 attendees on the webinar.
- Presented a clock hour session at the FASFAA Conference.
- Moderated a session at the FASAA Conference.



Executive Board Report June 2024
Shawn Haskin
Office of Student Financial Assistance (OSFA) Liaison

Committee Members (Name and Institution/Company):

N/A.

Committee Goals:

- N/A.

Policy & Procedure: Changes/ Recommendations:

- None.

Motion/ Action Item(s):

- None.

Summary of Recent Activities

The following information is a summary of recent activities OSFA has completed for state scholarship and grant participating institutions and FASFAA:

- Collected and processed Institutional Renewal Applications for participation in state scholarship and grant programs for the 2024-25 academic year.
- Assisted institutions with spring 2024 disbursement and reconciliation activities.
- Reminded institutions of any outstanding records available to process on the Disbursement Eligibility Report (DER) for the 2023-24 academic year, in addition to, reminding institutions of any outstanding refunds owed to the department.
- Continued to provide technical assistance and clarification related to the Open Door Grant Program (ODGP) and all other state programs.

Accomplishments

The following information represents the accomplishments of OSFA with respect to state scholarship and grant programs for participating institutions and FASFAA:

- Presented a State Scholarship and Grant Program update and a technical assistance training related to Submitting State Program Edits at the 2024 Annual FASFAA Conference.

- Attended all Executive Board meetings and staff has provided training sessions for institutions, upon request.
- Committed to provide continued training, upon request, at regional workshops, annual meetings, and webinars.
- Assisted institutions with the disbursement of approximately **\$1.06 billion** of state student financial aid within the 2023-24 fiscal year as of June 2024!
- Collected successfully 95% of all required Grade and Hour Report records from participating institutions, which equates to approximately 270,000 total records.
- Sent 30 official OSFA memorandums since the beginning of the fiscal year.