



**FASFAA Executive Board Meeting
Embassy Suites – USF/Busch Gardens
Tampa, FL
April 12-13, 2018**

2017-2018 FASFAA Executive Board

Elected Officers	
President	David Alexander
President-Elect & Nominations	Vacant
Vice President	Kamia Mwango
Secretary	Denise Asselta
Treasurer	Gail Rogers
Immediate Past President & Fiscal Concerns	Joan Bailey
Elected Region Representatives	
Region I	Kris Hatcher
Region II	Nichole Crowley
Region III	Sedrick Brinson
Region IV	Nadine Bailey
Region V	Katie Conrad
Members At Large Appointments	
Annual Conference Chair	Maureen Anderson
Vocational-Technical / Clock Hour Chair	Christine Taylor
Graduate / Professional Chair	Irma Molinares
Global Issues/Business Partner Liaison	Sean Johnson
Membership	Rabecca Hall
Electronic Services Chair	Jeremiah McMahon
Special Projects/Communications	Haley Auxier
Committee Chair Appointments	
Federal Legislative Relations Chair	Cherly Phillippeaux
OSFA Liaison & Newsletter Chair	Levis Hughes
Scholarship Committee Chair/Annual Conference Co-Chair	Tracy Wiles
Site Selection / Event Coordinator	Tracy Misner
Financial Literacy	Irma Molinares
Vendor / Sponsorship Coordinator	Jeff Daniels
FASFAA Support	
Bookkeeper	Gwyn Francis

Executive Board Report

April 2018

Why am I here?

I am here to provide leadership and guidance to the association, while supporting our members and serving the FA community.

Goals

- Work collaboratively with our board members to ensure that all requirements and/or goals have been met
- Ensure that we remain within budget, while facilitating informative training sessions, workshops, and the annual conference for our members
- Provide state representation at the regional level by serving on the SASFAA Board
- Continue to learn, network, and evolve
- Write article for the Spring newsletter

Accomplishments

- TBD

Recent Activities

- February 2018: I successfully attended and completed the association management and President Elect program/workshop. It was very informative and beneficial in regards to association leadership.
- February 2018: NASFAA Hill Visit. I met with Legislative Aid Eduardo Sarcasa(Senator Rubio's office) and Legislative Aide Taleen Mekhdjavakian(Senator Nelson's office) regarding the Prosper Act.
- February 2018: The Florida state dinner at the SASFAA conference in Alexandria, VA was held at the Columbia Firehouse restaurant. It was very successful and interactive, with approx. 20 attendees.
- Re-vamped the Leadership Program, with Mike Bennet and Brenda Brown leading the program for 2017-18.
- State Swap Confirmation. I have confirmed that the President-Elect of TN will be attending our conference and I will be attending the TN conference from the April 23-25.
- Created video for the Region workshops. Since I was unable to attend the Spring Workshops, I created a welcome video for the workshop attendees
- March 2018: I have solicited FASFAA award nominations for Honorary Lifetime Membership, Lifetime Service Recognition, and Distinguished Service Awards.

Vacant - President-Elect/Nominations

Executive Board Report

April 2018

Why am I here?

Chair the nominations committee, and work to ensure that FASFAA remains fiscally sound.

Goals

The goal of the year is to work with the nominations and election committee members to come up with a slate of candidates for the up-coming election May, 2018. I also look forward to hearing from board members as to possible candidates. The following positions will be up for election:

- President-elect
- Vice President of Training
- Region II Representative
- Region IV Representative

Accomplishments:

- Have slate of candidates to present at board meeting

Recent Activities

- Have been reviewing the Policy & Procedures for nominations and elections!

Task to be completed:

- Contact individual's approved for slate
- Send request to individuals to provide candidacy statement and headshot
- Work with Jerry to have polls up by May 5, 2018
- Send out email to members about upcoming election and polls opening date

Kamia Mwango – Vice President of Training

Executive Board Report

April 2018

Why am I here?

The Vice President of Training is responsible for providing resources to and assisting with coordinating all training activities of the Association, including workshops, seminars and conferences, as well as overseeing the Regional Representatives' training activities.

Goals

- The goal of the year is to provide training opportunities to new and seasoned financial aid professionals, and to continue to provide specialized training to the membership via Clock Hour Workshop, region workshops, and the conference program, all with sound fiscal management.

Accomplishments

- The NASFAA credentialing training package for associations was purchased and utilized for several events throughout the 17-18 year.
 - They were made accessible for approved FASFAA training activities.
 - Trainers and workshop planners could the materials via the [Google Drive](#) or contacting the VP of Training.
 - FASFAA approved the \$1,600 purchase for 10 topics that offer certification to attendees (when offered by someone certified in that NASFAA topic).
 - Topics: Application Process, Direct Loan Program, Need Analysis, Federal Pell Grant and Iraq /Afghanistan Service Grants, Professional Judgment, Return of Title IV, Satisfactory Academic Progress, Student Eligibility, Verification, Cash Management

Recent Activities

- The 2018 Annual Conference Agenda is well under way (Draft has been posted to website)
 - Preconference workshops are being finalized, speakers being confirmed
 - Programming is being finalized, including session descriptions and room locations
 - Specific tracks have been identified and further developed, including Clock Hour
- Bios will be requested for posting as soon as the Fed Trainer, Craig Rorie provides his
- OSFA to provide pocket and e-agenda – Thanks!
- Local arrangements and other volunteer(s) to assist with coordinating moderators – Thanks!

Denise Asselta - Secretary

Executive Board Report

April 2018

Why am I here?

- Assist the executive board with communications and reporting responsibilities.

Goals

- Assist all FASFAA members with any given tasks.
- Keep all executive board members with up-to-date information on board communication.
- Send out compilation reports, meeting minutes and board meeting agendas prior to each board meeting.
- Work with President on any additional tasks that may need to be completed.

Accomplishments

- Send out necessary documentation to board members for upcoming meeting.
- Update P&P as requested.
- Complete meeting minutes for board approval.
- Updated our executive board contact list.

Recent Activities

- Put together compilation report from board members and send out meeting minutes.
- Complete meeting minutes from previous meetings.
- Keep executive board in the know of deadlines for expected documents that need to be submitted.

**Gail Rogers – Treasurer
Executive Board Report
April 2018**

Pending report

Joan Bailey – Immediate Past President & Fiscal Concerns

Executive Board Report

April 2018

Pending report

Kris Hatcher - Region I Representative

Executive Board Report

April 2018

Why am I here?

- Serve the financial aid administrators of Region I

Goals

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

Accomplishments

- Insert accomplishments from your tenure

Recent Activities

- Served on regular and special nomination committees
- Spring workshop at Tallahassee Community College

Nichole Crowley – Region II Representative

Executive Board Report

April 2018

Pending report

Sedrick Brinson - Region III Representative

Executive Board Report

April 2018

Why am I here?

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

Goals

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

Accomplishments

- An email was sent on Friday, March 23, 2018 to Region III members notifying them of the date, time and place of the Spring 2018 Workshop.

Recent Activities

- My second Region III Workshop will be on Friday, April 20, 2018 and will be coordinated in a structured and well-organized manner. This workshop will provide Region III members with the necessary tools & training they need to fulfill their financial aid duties and responsibilities. This will also provide a time for our members to come together and discuss their experiences, financial aid issues, and new regulations for the upcoming year for financial aid professionals.
- The Region III Spring Workshop will be held at Valencia College, District Office on Friday, April 20, 2018 from 9:00 a.m. – 4:00 p.m.
- Presentations will include:
 - FASFAA Update (Video)
 - Sharpen Your Pencil: A History of Needs Analysis
 - Sharpen Your Pencil: Needs Analysis Applied
 - Customer Service
 - Post PPY Professional Judgements
 - Enhancing Your Financial Literacy Programs
 - State Updates
- Members will also be strongly encouraged to participate in the Bonnie Pirkle Scholarship raffle and the FASFAA Charity Fund, which will take place during the workshop.

Nadine Bailey – Region IV Representative

Executive Board Report

April 2018

Why am I here?

- As a board member to provide support and perform the duties as required of a region representative.
- To support the organization members, especially those in Region IV by providing opportunities for direct access to a FASFAA board member.
- To garner more interest and participation in the association.

Goals

- Increase members overall and garner more participation in regional and state-wide events.
- To identify and ensure the under-served sector (if applicable), has a conduit to the association.

Accomplishments

- Sent email to Region IV in regard to volunteer help that was needed for the annual conference.

Recent Activities

- Scheduled Spring 2018 Workshop for Friday April 27, 2018 at SPC.
- Will have one NASFAA credential training during the workshop.
- Nominated myself for VP Training for upcoming openings.

Katie Conrad – Region V Representative

Executive Board Report

April 2018

Why am I here?

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

Goals

- Communicate Association business and training opportunities with the members in Region V
- Plan Fall/Spring Region V training workshops offering NASFAA credentialing
- Represent Region V for FASFAA advocacy efforts

Accomplishments

- Updated Region V webpage with 2017-2018 information
- Region V Spring Workshop conducted on March 16th. Twenty-one members in attendance who completed the NASFAA Needs Analysis curriculum and qualified to sit for the credential examination. Katie Conrad was the credentialed trainer.
- Raised \$71 for the Bonnie Pirkle Scholarship Fund

Recent Activities

- Serve on the FASFAA training committee
- Serve on the FASFAA Advocacy committee
- Serve on the Nominations and Elections Committee

Maureen Anderson – Annual Conference Co-Chair

Executive Board Report

April 2018

Pending report

Christine Taylor – Vocational-Technical Clock Hour

Executive Board Report

April 2018

Why am I here?

- To represent and serve the technical/clock hour schools and programs in the state of Florida.

Goals

- To assist the technical/clock hour schools and programs in the state of Florida by way of training opportunities and lending resources and/or tools. This will be done through organizing the Clock Hour Workshops and solid representation of these schools and programs at the annual FASFAA conference
- Have technical/clock hour schools and programs more visible in FASFAA by making sure the needs of these schools and programs are being addressed through training, and to encourage active participation and more involvement in FAFSAA by way of volunteering

Accomplishments

- Built relationships with the clock hour attendees and collaborated to ensure a successful workshop in Safety Harbor.
- Open communication with FASFAA members to keep them informed and answering questions.

Recent Activities

- Email to Clock Hour ListServ to find presenters and topics for workshop.
- Email to five identified candidates to determine a panel for Clock Hour Hot Topics. No response received.
- Call with Mia in regards to clock hour needs for the annual conference.

Feedback from the Clock Hour Workshop

Hi Christine;

I have been attending the FASFAA clock hour workshops for the last several years and I have to commend you. This has been the most organized event I have attended to date.

I greatly appreciate your excellent communication both before and after the clock hour workshop as well as having the agenda and presentation materials available in a timely manner.

Thank you for the great effort, it was appreciated! :)

Sincerely,

Kim Williams

Associate Director, Financial Aid

Pasco-Hernando State College

10230 Ridge Road

New Port Richey, FL 34654

727.816.3195

williak@phsc.edu

Great workshop!!

hj

Christine,

Just wanted to thank you for all the work you did on the Clock Hour Workshop, I think it was excellent and with David there always informative. I have made some good friends over the years and this being my last workshop it was great to see them once again.

Keep up the good work. FASFAA is lucky to have people like you working for all the members.

Best of Luck.....

Robert

Robert Wetherbee

Financial Aid Coordinator

VA Certifying Official

Ridge Technical College

7700 St. Rd 544

Winter Haven, FL 33881

863-419-3060 ext. 4107

Christine,

Thank you for this information. I will fill out the survey as Dave was a great asset to me as a new person to FA. I am awaiting where I can provide feedback on the new officer training. I definitely want to share my thoughts on that.

Also, waiting for an email from the President in regards to the mentoring program. I simply must apply as being new to FA and hope I am chosen.

Thank you and it was a beautiful place!

Debra Young

Advisor

239-377-0924-phone

239-377-1003- fax

youngde@collierschools.com

Thank you for the reminder. I meant to fill it out last week. He was fantastic and I completely agree with the need to have him available. Best Fed I've seen train. it was also nice meeting you. I had not attended a FASFAA event in probably over 10 years now that I'm back in FL and working with FA Solutions I had the pleasure of attending and thought the whole event was fantastic (ok the hotel was the coldest hotel I've ever been in but otherwise - fantastic job!).

Thank you,

Bridget

Hi Christine,

Thank you for putting this workshop together for all the Clock Hour Tech Schools and Tech Colleges. It is extremely helpful to network and receive the training from David!

Thank you!

Lorrie

Lorrie Allen

Financial Aid Coordinator

Bradford - Union Technical Center

609 North Orange Street

Starke, FL 32091

904-966-6765 allen.lorrie@mybradford.us

I loved it!! I felt like I got more bang for my buck. I loved the year round presentation and the PJ was a added bonus. It was super informative and I am using it to put together training for my staff. YOu did a wonderful job!!

thanks

Lisa

Lisa Stone

Director of Compliance

FA Solutions, LLC

Phone: 727-565-2048

Email: lstone@getfasolutions.com

Thank you Christine

It was great to meet you at the workshop. I gained a lot from the sessions.

I filled out one survey for David, but I will go back in and fill out more. I have to find the agenda again so I can get the times/topics right.

Thanks

Pat Dailey Hanley

Financial Aid Officer

Emerald Coast Technical College

761 N. 20th Street

DeFuniak Springs FL 32433

850.892.1241 X5185

Irma Molinares – Graduate/Professional Chair/Financial Literacy

Executive Board Report

April 2018

Pending report

Sean Johnson - Global Issues

Executive Board Report

April 2018

Pending report

Rabecca Hall - Membership Chair

Executive Board Report

April 2018

Why am I here?

- To assist the membership with any membership related questions
- To continue to learn, conduct, and suggest improvements to the duties of the membership chair
- To promote the benefits of FASFAA membership

Goals

- To provide excellent customer service to all members of FASFAA whenever they have questions and/or requests relating to membership
- To continue to familiarize myself with Memberclicks
- Represent FASFAA in a professional and positive manner

Accomplishments

- Learning the ins-and-outs of membership renewal and providing assistance to members
- Updating member accounts as requested

Recent Activities

- Provided answers to membership inquiries by email
- Sent electronic and paper copies of membership certificates upon request
- Reminder email sent to all active members not paid for 17-18
- Update Membership Certificate with new president signature
- Provide assistance with renewal issues, such as providing temporary password

Jerry McMahon - Electronic Services Chair

Executive Board Report

April 2018

Pending report

Haley Auxier - Special Projects /Communications

Executive Board Report

April 2018

Pending report

Cherly Phillippeaux – Federal Legislative Relations Chair

Executive Board Report

April 2018

Pending report

Levis Hughes - Office of Student Financial Assistance Liaison and Newsletter Chair

Executive Board Report

April 2018

Why am I here?

- To assist FASFAA in fulfilling its purpose.
- To provide an update of state activities from the Office of Student Financial Assistance (OSFA).

Goals

- To coordinate state program needs of the Association and the Executive Board.
- Produce and present the newsletter to the President.
- Where applicable and allowed, solicit board members opinions and suggestions about potential state program changes.

Accomplishments

- 2018 General Appropriations Act is providing a \$1.1 billion to fund OSFA/state scholarships and grant programs.
- Produced and presented the FASFAA Fall Newsletter to the president.

Recent Activities

- OSFA provided guidance to postsecondary institutions on completing their Program Compliance Audits.
- Bright Futures Florida Academic Scholars (FAS) will receive funding for the 2018 summer semester, as required by proviso in the 2017 GAA. OSFA recently sent out notification letters to all eligible FAS students, provided instructions to postsecondary institutions for documenting students participating in the summer term, and a Q&A for additional guidance.
- The 2018 Legislative Session convened on March 11, 2018. Currently, there are several changes to OSFA-related programs such as:
 - Benacquisto Scholarship was expanded to include out-of-state National Merit Scholars;
 - First Generation Matching Grant Program changed the state-to-private match amount from a 1:1 match to a 2:1 match;
 - Florida Bright Futures Scholarship Program expands to provide summer funding beginning in 2018 for FAS (codified proviso language); 100 percent of tuition and specified fees for FAS at a public institution or comparable amount at a nonpublic institution, including \$300 for textbooks and college related expenses for fall and spring;
 - Florida Bright Futures Scholarship Program will provide summer funding for Florida Medallion Scholars (FMS), beginning in 2019; 75 percent of tuition and specified fees for FMS at a public institution or comparable amount at a nonpublic institution;
 - Florida Farmworker Student Scholarship Program is created to provide up to 50 scholarships for farmworkers and the children of farmworkers;
 - The Florida Resident Access Grant Program is renamed Effective Access to Student Education Grant Program; and
 - University of Florida's pilot program expands to provide Bright Futures fall funding, to be used for off-campus or online coursework, for the 2018-19 cohort of students.
- As in prior years, OSFA has tracked various bills and has provided a 2018 Legislation Affecting State Programs for 2018-19 Academic Year memo on bills that affect state scholarships and grants.
- The FASFAA Spring Newsletter is ready for articles to be submitted from membership about your institution's accomplishments, awards, changes, and updates.

Tracy Wiles – Scholarship Committee Chair/Conference Co-Chair

Executive Board Report

April 2018

Why am I here?

- Get involved by meeting new friends and colleagues.
- Increase exposure and participation for the Bonnie Pirkle Scholarship Fund at region workshops and the upcoming conference.
- Assist with preparing for the upcoming annual conference to ensure that members are able to get their training needs met.

Goals

- Increase members' participation in contributing to the Bonnie Pirkle Scholarship Fund.
- Find committee volunteers that will support the organization's goals at all workshops and the annual conference.
- Work with the training committee to ensure that Bonnie Pirkle has a presence at all upcoming fall and spring training workshops.
- Work with the conference and training committee to ensure that all goals are being met for the upcoming annual conference.

Accomplishments

- Communicated with Region Reps to ensure Bonnie Pirkle is being represented at workshops.
- Work with Conference Co-Chair Maureen to ensure that the conference committee is preparing for the upcoming annual conference, which will be held in Naples.

Recent Activities

- Bonnie Pirkle
 - Region I Representative, Kris Hatcher raised \$165 for Bonnie Pirkle at his Spring Workshop. Thank you, Kris!
 - Region V Representative, Katie Conrad raised \$71 for Bonnie Pirkle at her Spring Workshop. Thank you, Katie!
- Conference Co-Chair – have been working with conference committee members to ensure that we are completing tasks by deadlines assigned to ensure the upcoming conference will be a success.
 - Held our on-site meeting January 31st and February 1st, which was pushed back from the original plan of September due to Hurricane Irma. Since the in person meeting, we have had 5 additional conference calls.
 - Conference links are up and live on our website so that members can register and make hotel reservations for the upcoming conference.
 - Total Registered as of March 28th → 113
 - Have sent out multiple email blast to members from both myself and Maureen to drum up registration for the upcoming conference.
 - Mia has been working with the Training Committee to ensure that we have a variety of tracts that will be offered at the upcoming conference that will benefit the registrants attending the conference.

- Charity Chair, Sandy Shimp, has put together information for annual charity, which will be the “Christopher Misner Firefighter Scholarship Fund.” Information will be coming out on the website shortly. She has also reached out region reps to get baskets from each region for a silent auction.
- Local Arrangements Chair, Cindy Lewis has been working on confirmations of speakers and color guard for upcoming conference. Lewis was able to secure a speaker from FGCU for luncheon.
- Vendor/Sponsorship Chair, Jeff has received 24 committed vendors with 22/24 already paid.
- OSFA is available to offer the mobile app.
- Evening activities will consist of Tuesday Night: Lifeboat Drill, which will have games, BINGO, meet and greet with President Alexander. Wednesday Night: Bon Voyage Sunset Karaoke Party.

Tracy Misner – Site Selection/Event Coordinator

Executive Board Report

April 2018

Pending report

Jeff Daniels - Vendor/Sponsorship Coordinator

Executive Board Report

April 2018

Why am I here?

- To make valuable connections with FASFAA Executive Board members and FASFAA members as a whole as well as deepen my knowledge of FASFAA as ideas are shared. In addition I want to serve as a voice for FASFAA Business Partners with the goal of communicating any issues or concerns raised by them and to continue to solicit their support.

Goals

- To solicit vendor support at levels that will assist FASFAA in continuing to provide training opportunities for its members.
- To encourage new vendors to exhibit at the 2018 FASFAA Conference
- To continually reach out to Business Partners to solicit any suggestions, issues, or concerns that can be taken back to the Executive Board with the goal of enhancing the business partner's roles as FASFAA members.

Accomplishments

- Initially reached out to vendors in November 2017 to solicit support for FASFAA in general and specifically for the FASFAA conference. As of March 30, 2018 we have commitments from 24 vendors for the FASFAA2018 Annual Conference. The total dollar amount committed is \$42,800. We have received \$41,300 to date.

Recent Activities

- No activities to report at this time.

Gwyn Francis – Bookkeeper

Executive Board Report

April 2018

Pending report