



**Executive Board Meeting  
Caribe Royale  
Orlando, FL  
February 29 – March 1, 2016**

## 2015-2016 FASFAA Executive Board

<b>Elected Officers</b>	
President	<a href="#">Ryan McNamara</a>
President-Elect	<a href="#">Joan Bailey</a>
Vice President	<a href="#">Maureen Anderson</a>
Secretary	<a href="#">Tracy Wiles</a>
Treasurer	<a href="#">Gail Rogers</a>
Immediate Past President	<a href="#">Wayne Kruger</a>
<b>Elected Region Representatives</b>	
Region I	<a href="#">Rachel Robinson</a>
Region II	<a href="#">Kamia Mwango</a>
Region III	<a href="#">Denise Asselta</a>
Region IV	<a href="#">Dameion Lovett</a>
Region V	<a href="#">Cherly Philippeaux</a>
<b>Members At Large Appointments</b>	
Fiscal Concerns	<a href="#">Wayne Kruger</a>
Annual Conference Chair	<a href="#">Tracy Wiles</a> / <a href="#">Thomas Vo</a>
Vocational-Technical / Clock Hour Chair	<a href="#">Lorrie Allen</a>
Global Issues	<a href="#">Jeff Daniels</a>
Membership	<a href="#">John Snow</a>
Electronic Services Chairs	<a href="#">Christina Acosta-Heritage</a> / <a href="#">Kris Hatcher</a>
<b>Committee Chair Appointments</b>	
Business Partner Liaison	<a href="#">Jeff Daniels</a>
Parliamentarian Chair	<a href="#">Wayne Kruger</a>
Federal Legislative Relations Chair	<a href="#">Francisco Valines</a>

OSFA Liaison & Newsletter Chair	<a href="#">Levis Hughes</a>
Ambassador / Scholarship Committee Chair / Volunteer Services Chair	<a href="#">Rick Snodgrass</a>
Site Selection / Event Coordinator	<a href="#">Lori Auxier</a>
Vendor / Sponsorship Coordinator	<a href="#">David Alexander</a>
Nominations	<a href="#">Joan Bailey</a>
<b>FASFAA Support</b>	
Bookkeeper/Paid Position	<a href="#">Gwyn Francis</a>

**President – Ryan McNamara**  
Executive Board Report  
February 2016

***Why am I here?***

- Continue to ensure the Association is strong

***Goals***

- Update FASFAA P&P
- NASFAA Credentials for FASFAA members

***Accomplishments***

- Almost finalized the Policy section of P&P

***Recent Activities***

- SASFAA – February 7-10, 2016 in Greensboro, NC
- SASFAA Board Meeting – February 6, 2016
- Assist Conference Committee wherever needed

**President-Elect/ Nominations Committee – Joan Bailey**

Executive Board Report

February 2016

***Why am I here?***

I am here because I want to serve and give back to my profession, I want to help others develop knowledge and skills that empower them to make better contributions to the students we serve. I believe that I can continue to bring a fresh perspective to the organization. So far I have enjoyed what I have done and enjoyed working with the members of the organization. It hasn't been without challenges but nothing is ever without challenges. Thanks for the support of those board members who willingly has supported my efforts to serve in one way or another.

***Goals***

- Work closely with all broad member to carry out the activities of the association
- Represent FASFAA at activities and events as determined by the president
- Secure and present a well suited slate of candidates for the election to be concluded at the 2016 annual conference.
- Continue to assist with training initiatives at the regional and state level
- Write Articles for fall/spring news letter
- Start working on 50<sup>th</sup> anniversary conference plans

***Accomplishments***

- Wrote an article for Fall newsletter
- Work on P&P Committee – ongoing process
- Make recommendations/contributions to the 2016 conference committee
- Selected to be the SASFAA representative on the 2016 conference program committee
  - Worked with the other members of the committee in selecting sessions for the conference
  - Selected moderators from the SASFAA Region
- Attended SASFAA President Elect Workshop (SASFAA Conference)
  - Meet with the other SASFAA States President elects (missing was Mississippi and South Carolina)
  - Share ideas and thoughts for working together next year and got information on governance, running meetings etc.
- Represented FASFAA at NASFAA Leadership Conference (see more under Recent Activities)
- Selected Conference Co- Chairs for 2017 50<sup>th</sup> anniversary, will be Nathan Basford and Tracy Wiles
- Have started conversations with members I would like to appoint to serve on the 2017-2018 board

***Recent Activities***

- I attended NASFAA leadership and legislative conference in Washington DC doing the Association Management Track, present were the president elects from states as well as regions. There were also some secretaries and treasurers. This was very informative led me to realize that although for the most part FASFAA is a solid organization, there are many things we are not doing correctly
  - We were given practical tools to use to govern during our year:
    - Documents each association should have
    - Where these documents are to be housed/stored
    - The legal as well as fiscal responsibilities of the association
    - How to run meetings – Roberts Rule
    - How to write minutes/board reports and other documents
    - Role of voting versus non-voting members
    - Executive Board versus committee chairs
    - Executive sessions – what it is and why

Upcoming Activities:

- Coordinating the Leadership mentor Pre Conference workshop
- Attending Alabama State conference on the SASFAA President Swap Program, the Alabama President Elect will be attending FASFAA conference
- Planning of transition meeting
  - Will be bringing in someone to go over association governance with the board and reviewing expectations

**Vice President of Training – Maureen Anderson**  
Executive Board Report  
February 2016

Report Pending

**Secretary/Conference Co-Chair – Tracy Wiles**

Executive Board Report

February 2016

***Why am I here?***

- Serve as Secretary and Conference Co-Chair.
- I am here to become more involved in our wonderful association and make lifelong friends while working together to better our association.
- Hopeful that I can help provide new ideas and fresh insight to this wonderful organization.

***Goals***

- Ensure that all executive board members have the most up-to-date information in a timely manner.
- Continue moving forward with conference planning to ensure that our 2016 conference is a complete success.
- Help the board and all FASFAA members.
- Help with the update of our current FASFAA P&P Manual.
- Soon have draft agenda for conference to publish on conference website.

***Accomplishments***

- Send out sympathy cards on behalf of organization.
- Completed various phases of the 2016 conference planning.
- Had an article put into the Fall newsletter to remind FASFAA members about the upcoming conference.
- Worked with Conference Committee to ensure that conference registration was successfully opened.
  - As of Friday, February 26, 2016 we have 31 registered for the 2016 conference.

***Recent Activities***

- Send out board reports, meeting agenda and necessary information to the executive board and conference committee.
- Work with Conference Co-Chair to organize and accomplish tasks for upcoming conference.
- Work with P&P Committee to get FASFAA's Policy and Procedure Manual up-to-date.
- Work with Tracy Misner on getting conference artwork.

**Treasurer – Gail Rogers**  
Executive Board Report  
February 2016

Report Pending

**Immediate Past President/ Fiscal Concerns/ Parliamentary Chair – Wayne Kruger**  
Executive Board Report  
February 2016

Report Pending

**Region I Representative – Rachel Robinson**  
Executive Board Report  
February 2016

***Why am I here?***

- To support the financial aid community in Region 1, by making continuing educational opportunities available via workshops that meet their needs.
- To work with board members and others to accomplish these ideas.

***Goals***

- Encourage financial aid managers to participate and allow their staff to participate in FASFAA Region 1 events.
- Encourage staff to participate, volunteer and become a FASFAA member and actively seek approval from managers to become more involved in this ever changing and challenging environment.

***Accomplishments***

- Region 1, Spring Workshop will be at FSU Panama City, Florida campus, on March 18, 2016.
- I have 10 Member to sign up as of 2/24/2016.
- The topic will include legislative advocacy and Transit, Federal updates and State updates.
- Other topics we may discuss as a round table is Prior year income and Perkins loans and PLUS Loan Counseling.

***Recent Activities***

- T.C.C College Goal was Thursday February 18, 2016. They had Thirty people that showed up but only seven needed help with their FAFSA.
- FSU College Goal was Sunday February 21, 2016. They had about Thirty five people and four needed help with their FAFSA.
- I looking into trying to have Region 1, Fall Workshop at Pensacola State College, Pensacola, Florida, October 2016. The other alternative will be Gulf Coast in Panama City Florida.

**Region II Representative – Kamia “Mia” Mwango**

Executive Board Report

February 2016

**Goals**

- *Provide financial aid information and professional development for Region II FASFAA members*

**Accomplishments**

Emails were sent or forwarded to Region II members regarding the following topics:

- FASFAA, SASFAA, NASFAA and other professional development conference/participation activities
- Requests for nominations

Members have been emailing and requesting more information or connections with other members

Best Practices:

- Personalized emails using member list and email merge – greater response! (Encouraged members to sign up for the listservs)
- Personalized follow-up email to attendees with links to materials in Dropbox instead of attachments
- More scenario-based training

**Recent Activities**

The Region II Fall Workshop will be held on March 29, 2016, hosted at Santa Fe College in Gainesville, FL.

- Announcements and the call for registration went out on 10/12/15.
- Possible topics include:
  - Federal Updates
  - State Updates
  - Career Development/Leadership
    - Servant Leadership: There’s no “I” in Team.
  - Discussion Topics:
    - Check-in from Last Workshop
      - Enrollment Reporting
      - Gainful Employment
      - Enrollment Management
    - Hot Topics in Financial Aid
      - Cohort Default Rates (CDRs)
      - Student Loan Disputes and Consumer Protections
    - Best Practices for Financial Aid Student Services
- The Bonnie Pirkle Scholarship raffle will be promoted at the workshop
- Light breakfast refreshments and lunch will be provided. The menu depends on the number of attendees.

**Region III Representative – Denise Asselta**  
Executive Board Report  
February 2016

***Why am I here?***

- To support and facilitate communication to Region III members through training experiences, ideas, and information.

***Goals***

- Provide a variety of training experiences to Region III members during workshop events.
- Promote communication throughout the Region III membership.
- Strive for members to pursue excellence to students when providing financial aid.

***Accomplishments***

- A successful Fall Region III meeting took place on Friday, November 6<sup>th</sup>, we had about 20 people attend the workshop. Lunch was provided by the culinary students at TECO.

***Recent Activities***

- Preparations have begun for the Spring Region III Workshop. The spring workshop will take place on Friday, April 1<sup>st</sup> from 9:00 am to 4:00 pm. The workshop will be at Orange Technical College formerly known as Mid Florida Tech. We are planning on having the following presentations at the workshop: Prior, Prior Year, State Update, Difficult Conversations Managing Conflict while Providing Customer Service, Verification, Default Prevention, and Consumer Information. Registration is set up for members to register for the Spring Region III Workshop. Members are being contacted via email to register for the workshop.
- Emails were sent to Region III members at the beginning of January to update members on upcoming events such as FASFAA Annual Conference, SASFAA Conference and open positions on the FASFAA executive board. Members were encouraged to participate in running for an office on the FASFAAA executive board.

**Region IV Representative – Dameion Lovett**

Executive Board Report

February 2016

***Why am I here?***

- To support the organization's members by providing quality training opportunities that meet the needs of members of Region IV
- To help facilitate region members to become active in the association
- To work with other members on the board in fulfilling the associations goals

***Goals***

- Have at least 35 attendees at spring region workshop
- Encourage more participation in association activities
- Establish a line of communication to new association members

***Accomplishments***

- Set up a "Milestones in Financial Aid" section on the region website to recognize members and their length of service in the field
- Organized spring region workshop to be held on March 3, 2016 at FGCU with the following topics:
  - Default Management & Financial Literacy
  - Verification
  - Prior, Prior Year
  - FASFAA/SASFAA Update
  - Customer Service
  - State Update
  - Managing Work/Life

***Recent Activities***

- Encouraged participation in the region workshop agenda by soliciting feedback from region members
- Welcomed new FASFAA members who registered for the spring workshop

**Region V Representative – Cherly Philippeaux**  
Executive Board Report  
February 2016

Report Pending

**Conference Co-Chair – Thomas Vo**  
 Executive Board Report  
 February 2016

**Conference Committee Reports**

I. Registration/E-Services Update: (Brian Casey, Kris Hatcher)

1. web forms

- Finalized \$160 flat rate for Business Officer Pre-Conference workshop
- Member and Non-Member conference registration ready to go live
- Issue remaining with “Member Clicks” credit card payment. Awaiting resolution before can launch.
- **Will go live on Monday 2/15/16**
- **REGISTRATION IS NOW LIVE! EFFECTIVE 2/16**

2. steps remaining to go “live”, “Live” Date

- Contact Member Clicks, put pressure to resolve credit card issues
- Resolve Daily Registration form issue that created odd balance owed of \$80 registration
- Final round of Testing of forms
- Update Conference website with President welcome message (Ryan Mcnamara)
- Leadership Experience needs updated by Joan Bailey
- Brian Casey and Kris Hatcher to test Retired registration link, provide discount code for registration

II. Membership (John Snow)

1. Ribbons status (Thomas Vo)

Thomas obtained ribbons from SPC. They are located in his office. Inspected the inventory and they are in good shape. Total inventory #'s as follows:

<b>RIBBONS</b>	<b>Color</b>	<b>Quantity</b>
Ambassador	Maroon	44
Ask FASFAA	Navy	57
Conference Committee	Light Purple	56
Distinguished Service Award	Red	42
Diversity	Purple	48
Electronic Services	Lime Green	25
Executive Board	Dark Green	47
Fiscal Concerns	Teal	37
Gold Sponsor	Gold	119
Honorary Lifetime Member	Lime Green	27
Local Arrangements	Green	79
Moderator	Black	25

Past President	Medium Purple	4
Past President	Pink	50
Platinum Sponsor	Light blue	6
Presenter	Cherry	21
President Elect	Flesh	21
Registration	White	49
Scholarship Committee	Light Peach	7
Silver Sponsor	Silver	24

2. Status report

As of 2/9/16: 532 paid members. John Snow to solicit new members to join and register.

Past 3 year attendance numbers= 13' Bonita Springs 338, 14' St. Pete 303, 15' Saint Augustine 289

3. Next steps

Ribbons to use: President, President-Elect, Past President, Conference Committee, Speaker, Moderator, New Member, Executive Board, Ask Me, Retired

Vo/Wiles to get final numbers required and order ribbons as necessary

III. Charity: (Catherine Morgan)

1. Survey completed. Charity Chosen= Community Cooperative - eliminate hunger and homelessness in Lee County **(CONFIRMED)**

2. Next steps:

Contact was made 2/9 with the organization.

Will proceed with having charity set up a table for canned food and monetary donation during Pre-Conference and Conference. (Vendor area)

Also will have representative speak about Charity on day 1 welcome message (Catherine to coordinate with Maureen and David Alexander)

IV. Site Selection: (Lori Auxier)

1. meal prices **(CONFIRMED)**

Conference meal and budget has been set and approved.

May 24: Opening Lunch (plated)

Welcome Reception (Complimentary)

Dinner (On your own)

May 25: Breakfast (Continental)

Lunch (plated)

Dinner (On your own)

Evening Event (Malt Shop)

May 26: NO BREAKFAST (On your own)

Morning Break (Variety of soda/water)

Lunch (Spring Time BBQ)

Dinner (On your own)

Evening Event (Healthy Break)

May 27: Closing Breakfast (Sunrise on the Gulf)

2. guest meal tickets **(CONFIRMED)**  
Prices set. Information provided to Kris Hatcher to update website
3. Pre-Conference meal options **(CONFIRMED)**  
SET AND CONFIRMED
4. Remaining items  
7 total meeting rooms for breakout, others for association purpose) (Estera, Sanibel A&B, Colusa A&B, Pine A,B,C, PreFunction, Terrace, Vendor Area, Conference Committee  
Once agenda finalized- rooms will be assigned (Jan Smith, Lori Auxier, Maureen)  
Will need total attendees for Welcome Reception (Use room block 1<sup>st</sup> night)

V. Training/Pre-Conference workshop: (Maureen Anderson)

1. status report, steps to go live **(CONFIRMED)**  
Pre-Conference Save the Date has been sent.  
Ready to go LIVE with registration 2/15/16
2. Agenda/Speaker schedules  
Pre-Conference: D. Bartnicki to arrive Monday 23, 10:30am and will present through Tuesday 24 2:30pm

Conference: 33 Session proposals have been received (not counting federal updates)

Draft Agenda to be ready 2/23

3. Remaining items to discuss

Pre-Conference: Look to get other sponsors. So far have 1 (\$250)

Need different color ribbons for Pre-Conference attendees

Maureen to email Region reps to solicit topics to present (Use SASFAA, NASFAA as reference)

Kris Hatcher to provide webform to solicit topics, Lorrie Allen to provide link to Maureen

### **LIVE REGISTRATION DATE 2/15**

#### VI. Keynote Speaker: (Thomas Vo, Tracy Wiles)

1. Discuss options  
Options presented to hire professional motivational keynote speaker  
Committee decided too expensive. Go for local President or Sr. Administrator of Higher ED Institution
2. decide next steps  
Contact Jeff Daniels, solicit assistance on obtaining Diversity Based Speaker (Vo, Wiles)

Will have speaker by next meeting (2/23)

#### VII. Local Arrangements: (Anne Hart)

1. Entertainment/Subcommittee status  
Anne Hart has contacted Regional reps to begin planning "Minute to Win It" and other evening activities
2. Color Guard: **CONFIRMED**  
South Ft Myers High Color Guard: CONFIRMED
3. National Anthem Singer: **CONFIRMED**
4. Local "welcome" speaker  
Executive VP Dennis Graf(sp) **CONFIRMED**- allotting 30 min to speak

#### VIII. Vendor/Sponsorship: (David Alexander/Irma Molinares)

1. Status Reports  
David and Irma have communicated and started to plan activities to reduce anxiety and increase traffic to vendor area
2. Scavenger hunt/activity to reduce attendee anxiety  
Activities being planned

3. Next Steps

Kathleen Roebuck (FATV) has some creative ideas to add also. Thomas has emailed David Alexander, Irma Molinares and Kathleen to open communication on ideas (2/10) Deferring to David Alexander's leadership and offered conference call

Draft activity and plan for 2/23 meeting

IX. Ambassadors/Scholarships (Rick Snodgrass)

1. Update

Rick to serve as photographer.

Sending emails to members to encourage volunteerism, need moderators, members, etc.

New Member breakfast with Executive Board- **CANCELLED**

Will provide gifts to new members.

2. Next Steps

Tracy Wiles and Rick Snodgrass to research gift ideas (NO TSHIRTS) item must have FASFAA logo, no year

Tracy Wiles and Thomas Vo to also research other gifts and Conference Committee polo shirts. Next meeting (2/23) to have ideas to present and order

X. Facilities (Jan Smith)

1. Update

Will be ready to create room layouts once agenda created (est. 2/23)

2. Next Steps

Working on Mobile Conference application

XI. Treasurer/Bookkeeper (ABSENT, no REPORT)

1. Update

2. Next Steps

**Vocational-Technical/Clock Hour Chair – Lorrie Allen**  
Executive Board Report  
February 2016

***Why am I here?***

- To represent Career Technical Education and Clock Hour Schools

***Goals***

- To assist in planning sessions at the annual conference
- Assist schools with any issues they may have with federal aid regarding clock hours
- Aid in keeping schools current with the appropriate training and workshops

***Accomplishments***

- Clock Hour Workshop in October 5-7, 2015 in Orlando
- 110 schools were in attendance and David Bartnicki, our federal trainer from DOE, conducted training clock hour workshops, along with volunteers from members of FASFAA

***Recent Activities***

- Assisting with clock hour session for the 2016 Annual FASFAA Conference in May
- Returning emails regarding clock hour issues and clock hour sessions that may be offered at the annual conference in May 2016

**Global Issues – Jeff Daniels**  
Executive Board Report  
February 2016

***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 the Florida Association as ideas are shared. In addition I want to increase the efforts of the Global Issues Committee.

***Goals***

- Provide a link to upcoming or past diversity-based events or news items on the FASFAA website.
- Each month, on the FASFAA website or through the FASFAA Listserv, make available an article focusing on an area of diversity.
- Work with conference committee to incorporate interest sessions or a speaker at the 2016 FASFAA Conference that focuses on diversity.

***Accomplishments***

- In the process of securing global issues sessions for the 2016 FASFAA Conference.
- Will soon begin to send a series of emails relating to diversity through the FASFAA listserv.

***Recent Activities***

- No recent activities to report.

**Business Partners Liaison – Jeff Daniels**

Executive Board Report

February 2016

***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 the Florida Association 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.

***Goals***

- To continually reach out to Business Partners to solicit any suggestions, issues, or concerns that may enhance their role as a member of FASFAA.

***Accomplishments***

- No accomplishments to report but have entered the information from the last report so that the conference committee is aware.
  - “The one thing that I can recall from last year’s conference was on the final day of exhibiting, after the luncheon, there was little to no traffic in the vendor area. There were concurrent sessions offered during the afternoon, but there was no break and no reason for schools to return to the vendor area. This left us all standing around until it was time to break down and/or some vendors opting to break down early. There is no reason for the vendor area to be open if schools are not going to come through and spend time with us.

It might be helpful for the Business Partners if FASFAA offered refreshment breaks (people will usually go where the food/drink is) and serve the refreshments in the vendor area. This may have previously been discussed during the Post Conference Wrap-up Meeting, but you asked so I thought I would share what I can recall.”

“I like when the vendor area is included in the main event or breaks are where the vendor area will be to promote as much connected activity as possible. Additionally I also liked the “vendor Bingo” which had each person coming to the booth. If we can continue that momentum that would be great for all vendors.”

***Recent Activities***

- No activities to report.

**Membership Chair – John Snow**  
Executive Board Report  
February 2016

***Why am I here?***

- I am here to work with a team to support FASFAA's mission and goals!

***Goals***

- Continue to keep MemberClicks as accurate as possible
- Print and mail 2015/2016 membership certificates, for paid members, at member request
- Assist in the transition of new membership chair for 2016/2017
- Present at upcoming Region III Spring Workshop

***Accomplishments***

- Responded to membership questions and e-mails
- As of February 25, 2016: Total PAID Members for 2015/2016: 548
- Paid Members by Region:
  - Region 1: 55
  - Region 2: 79
  - Region 3: 119
  - Region 4: 162
  - Region 5: 93
  - Non-Florida: 40

***Recent Activities***

- Presented at Region III Fall Workshop
- Researched possibility of providing members with electronic membership certificates

**Co - Electronic Services Chair – Kris Hatcher**  
Executive Board Report  
February 2016

***Why am I here?***

To network with fellow Financial Aid colleagues.

**Goals**

- Efficiently update [www.fasfaa.org](http://www.fasfaa.org) so executive board members can accomplish their duties in a timely manner.

***Accomplishments***

- Set up the following spring workshop registration forms:
  - Region I
  - Region II
  - Region III
  - Region IV
- Set up the annual conference webpage and registration forms
- Organized FASFAA's forms and media in MemberClicks' database

***Recent Activities***

- Responded to various website / MemberClicks requests.

**Co - Electronic Services Chair – Christina Acosta-Heritage**  
Executive Board Report  
February 2016

Report Pending

**Federal Legislative Relations – Francisco Valines**  
Executive Board Report  
February 2016

***Why am I here?***

- Short answer: To serve the Association and advance its goals.
- Long Answer: We are in the midst of Reauthorizing the Higher Education Act of 1965 as amended. While no one expects that to happen until after the November election, it is still very important to be informed about what is happening and be ready to inform the membership.

***Goals***

- Keep the Membership apprised of legislative activities through use of the FASFAA listserv and Newsletter.
- Participate on the SASFAA Legislative Affairs Committee
- As a member of the SASFAA Legislative Affairs participate in Hill visits in April

***Accomplishments***

- See below

***Recent Activities***

- Pushed recent updates from DC to the LISTSERV
- Participated in SASFAA Legislative Affairs Committee Conference calls. (Minutes attached)
- April Washington DC visit has been finalized. April 19-21, 2016. Ryan and myself will be attending.

**Federal Legislative Relations – Francisco Valines**  
Executive Board Report  
February 2016

**Legislative Relations Call Notes 1/13/2016**

I. Overview of Federal Developments in D.C.

- Reauthorization Bill will probably not be passed in 2016 due to available time and the Presidential election.
- Some bills on parts of Reauthorization could be passed but it will depend on how many try to attach amendments on other issues.
- Our Hill Day visit will be very important as there is time to make our concerns known.

II. Review Legislative Priorities for the Hill Day

- The committee reviewed four white papers:
  - 1) Promoting Student Success by Assisting Students and Families in Making Smart Postsecondary Education Decisions
  - 2) Simplifying and Improving Federal Student Aid by Streamlining the Myriad of Student Loan Repayment Plans
  - 3) Assisting Struggling Borrowers by Expanding Access to Loan Rehabilitation
  - 4) Reducing Burdensome and Unnecessary Federal Regulations that Stifle Innovation and Create Barriers to Assisting Student and Parent Borrowers
- These documents were reviewed with suggested revisions made to 1 and 2. The documents have been revised and are attached to this email for your review. Please let me know if you have any additions as I would like to send to the SASFAA Board next week for their review.

III. Hill Day Preparations

- Hill Day will be April 20<sup>th</sup> with travel in on April 19<sup>th</sup> and returning either the 20<sup>th</sup> or 21<sup>st</sup> based on Committee members' schedules.
- Goal is to meet with the HELP Committee of the Senate and the House Education Committee as a group and then Legislative Relations Committee members will meet with as many of their state delegations as possible.

- Tracy Misner has secured the hotel. Attending as determined on the call:

Alabama: TBD, 1 person, 2 nights

Florida: Frank and TBD, 2 nights

Georgia: Christen and Sara, 2 nights

Kentucky: Erin and TBD, 2 nights

Mississippi: TBD (no current reservations)

North Carolina: Victoria, 2 nights

South Carolina: Joey and TBD, 2 nights (one room)

Tennessee: Ron and Dick, 2 nights

Virginia: Chad and Della, 2 nights

Amy Berrier: 2 nights

Marian Dill: 2 nights

Nathan Basford: 2 nights

Please notify me of any changes to the list above.

- Dinner together Tuesday night and Wednesday night. Ron will work on reservations.

#### IV. Follow-Up Meetings/Calls

Meeting and call-in 5:15 p.m. Eastern Time in Amy's suite (Suite 364) scheduled for Tuesday, February 9. Ron will circulate the call-in numbers for those not attending the conference.

Two assignments with this email:

- 1) Review the revised position papers.
- 2) Review the room list and provide updates if applicable.

Thank you for your participation. Please respond as soon as possible for any additions or corrections.

Ron

**Federal Legislative Relations – Francisco Valines**  
Executive Board Report  
February 2016

**SASFAA Legislative Relations Conference Call Conducted 2-9-2016**

Call Focus: Legislative Relations Committee Hill Day on April 20, 2016

Dates for Visit: April 19 Travel Day: Meet for dinner at 6:00 p.m. at hotel

April 20 Hill Day: Plan to meet with Senate HELP Committee Staff and

House Education Committee Staff as a group. Time to be determined.  
Individual visits may be established around these times if possible.

April 21: Travel Day

Trip Hotel Location: Marriott Courtyard Washington

1325 2<sup>nd</sup> Street, N.E.

Washington, D.C.

Hotel reservations will be made for the group. SASFAA LR budget provides \$1,000 for one SASFAA participant for each state. Room and tax expense for SASFAA covered participants will be on the master account. List of reservations and who pays is attached.

Airfare reservations should be made early as D.C. is normally high fares and they normally go up as the travel day gets closer. Fill out SASFAA travel expense form and submit to Ron Gambill to sign as Chair of Legislative Relations prior to sending to SASFAA Treasurer. Please email forms to [rgambill@edsouth.org](mailto:rgambill@edsouth.org).

Member Visit Preparations

Attached is a list of the SASFAA states that have representation on the Senate and/or House Committees over higher education. The scheduler and office number have been provided in order to make an appointment for the visit. Be aware that the actual member may not be available but a staff person normally will cover in those cases.

The SASFAA recommendations will be condensed and electronic copies will be provided for you to print for the individual member meetings.

Visits are generally 15 to 20 minutes, but may go longer based on the available time and interest in the topics. Provide sufficient time between meetings to get to the next office.

Please bring business cards to hand out.

Note: Please make your school administration aware of your Congressional visits' plan. At some institutions, there are government relations staff that would want to know and what will be presented.

#### Dinner Menu

A copy of the hotel restaurant menu is attached. In order to prepare for the group dinner on the 19<sup>th</sup>, please select an item from the Soups & Salads list and/or the top part of the Something More list which is sandwiches, pizza, etc. There will be a selection of Starters/Shares provided. The restaurant needs the count in order to serve this size of a group. Please communicate your selection to Jan Lassiter at [jlassiter@edsouth.org](mailto:jlassiter@edsouth.org) by March 26.

#### Errata

The schedule for the Senate HELP Committee and House Education Committee will be determined as soon as possible, and you will be notified in order to start scheduling the individual member visits.

#### Next Conference Call

A doodle schedule will be sent for the week of March 14.

Thanks for all that you are doing for SASFAA institutions and students.

Prepared by Ron Gambill

**Office of Student Financial Assistance Liaison and Newsletter Chair – Levis Hughes**

**Executive Board Report**

February 2016

***Why am I here?***

- To assist FASFAA in fulfilling its purpose
- To provide an update of state activities for 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***

- In progress - see below

***Recent Activities***

- The **2016 Florida legislative session closes March 11**. At this time, OSFA is watching the appropriations bills and anticipates steady funding for state financial aid programs. Bills related to cohort default rates have not moved forward to date.
- As a reminder, **audit reports are due March 31** from all private institutions that have disbursed state programs funds. Thank you to those institutions that have already fulfilled their audit requirements.
- OSFA thanks the state universities, private institutions, and public vocational/career centers for data submission related to the **expanded reporting requirements**, set by the 2015 Florida legislature. The legislature is requiring, in addition to loan volume data, expanded reporting of all grants, scholarships and award data to students who are receiving state-funded aid. This includes Prepaid, private awards, and institutional awards, as well as federal aid. This report is **due to OSFA April 29<sup>th</sup>**.
- Institutions participating in state programs can look forward to the **May 2<sup>nd</sup> opening of the online renewal participation application**. By reducing the number of questions and prefilling the majority of questions, we have made it super easy to complete by the **June 8<sup>th</sup> deadline**.
- Thank you to institutions that volunteered their facilities for our fall annual **National Training for Counselors and Mentors (NT4CM)**. From September through December, we were able to provide 500 counselors and mentors with financial aid training. (Ave Maria/Ave Maria University, Gainesville/Santa Fe College, Broward County/Keiser University, Jacksonville/FSCJ Downtown, Miami-Dade/Keiser University – Doral, Orlando/Valencia College – West Campus, Sarasota/Manatee County/USF Sarasota-manatee, Palm Beach/Palm Beach State College, Polk County/Jim Miles Professional Development Center)

- As we speak, OSFA is sponsoring this year's **College Goal Sunday activities** statewide. Of the 41 sites, 25 were held (in January) or are being held (this February) at a Florida postsecondary institution. We are part of the national FAFSA initiative - efforts to increase the educational attainment of low-income, first-generation students.
- As you complete spring activities, you may wish to begin thinking about articles for the **FASFAA summer newsletter**, which we traditionally publish by July 1. Lately, we have had too few articles from membership and too many articles from vendors. Membership would love to hear about your institution's accomplishments, awards, changes, and updates.
- FASTER information ????????

**Ambassador/Scholarship/Volunteer – Rick Snodgrass**

Executive Board Report

February 2016

***Why am I here?***

- To serve FASFAA, my university and its students.
- To gather information on volunteer needs for the Annual Conference, Regional Workshops, and Clock Hour Workshops.
- To provide opportunities to promote the Bonnie Pirkle Scholarship.

***Goals***

- Provide a positive experience to new members at annual conference
- Help provide networking opportunities for members
- Promote scholarship opportunities at the Annual Conference, Regional Workshops, and Clock Hour Workshops.

***Accomplishments & Activities***

- Sent emails through ListServe and direct email to all members to become a volunteer for FASFAA and to complete the volunteer form on our website.
- Sent thank you emails to the newly registered volunteers and informed them that they would be contacted by FAFSA representatives for more information on volunteering.
- Downloaded Volunteer Spreadsheets, and forwarded to the Executive Board and Conference Committee members.
- Working with Conference Committee Co-Chair to decide upon the new member gift (portable charger); approximately \$5 per person.
- Bonnie Pirkle: Region IV (Dameion Lovett) raised \$80 at Fall Workshop.

**Site Selection / Event Coordinator – Lori Auxier**  
Executive Board Report  
February 2016

***Why am I here?***

- To assist the FASFAA Executive Board in selecting sites and coordinating events during the 2015/16 fiscal year

***Goals***

- Coordinate 2016 FASFAA Annual Conference @ Hyatt Regency in Bonita Springs, Florida
- Coordinate Spring 2016 FASFAA Executive Board Meeting @ Caribe Royale Resort in Orlando, Florida
- Coordinate Summer 2016 FASFAA Executive Board Retreat (Location: TBD)
- Coordinate additional events upon request

***Accomplishments***

- Completed arrangements for Spring 2016 FASFAA Executive Board Meeting
- Completed meal selections for 2016 FASFAA Annual Conference and Pre-Conference Workshop
  - Will need to work with hotel staff to make necessary changes to keep menu selections under the \$275 registration costs (may want to consider raising registration costs to \$300 to cover increasing food costs)
  - Continue to work with Conference Committee, as needed

***Recent Activities***

- Completed RFP for Summer 2016 FASFAA Executive Board Retreat
  - Narrowed selection down to two; will review finalists w/Joan Bailey

**Sponsorship Chairs – David Alexander**  
Executive Board Report  
February 2016

***Why am I here?***

- *To do my part in making this a successful sponsorship year and helping the board members with their tasks.*

***Goals***

- *To meet the goal of \$35,000 and surpass last year's total of \$42,900*
- *To have one housing area that has a viewer friendly layout for the vendors/sponsors and participants to enjoy*
- *To increase the interaction between the sponsors and conference attendees for the upcoming conference*

***Accomplishments***

- *Surpassed the 14-15 goal of \$35,000 by \$7,900*
- *Find innovative ways to increase participation, which will also be seen in the 15-16 Conference*

***Recent Activities***

- Finalization of the price and process for the sponsors of the Cash Management Pre Conference Workshop
- I've met with Thomas Vo , Kathleen Roebuck, and Irma Molinares to come up with a new general slogan that will increase attendee awareness of the vendors/sponsors

**Bookkeeper – Gwyn Francis**  
Executive Board Report  
February 2016

Report Pending