



Executive Board Meeting  
Historic Dodgertown  
Vero Beach, FL  
October 19-20, 2015

## 2015-2016 FASFAA Executive Board

Elected Officers	
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>
Elected Region Representatives	
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>
Members At Large Appointments	
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 Elect / Nominations – Joan Bailey**

Executive Board Report  
October 2015

***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.
  - Need confirmation of timeline from executive board
- 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***

- Prepare outstanding CEU Certificates
- Work on P&P Committee
- I was selected by NASFAA staff to be the SASFAA representative on the 2016 conference program committee; I hope to do FASFAA and SASFAA proud.
- Represented FASFAA at NASFAA Conference – see below

***Recent Activities***

- I attended NASFAA State President's Breakfast meeting at the annual conference this past July. Due to Ryan's job change and his travel restrictions and since I was already at the conference I attended in his place.
  - NASFAA Investment accounts are open to states, if we are interested to Contact Justin, minimum \$50,000 investment with 7-9% returns
  - Training Partnership – states purchase core material NASFAA will help trainers to be credentialed at no cost for training materials only required to purchase core.
  - Leadership EXPO, February 22-24, Crystal City Hilton

- NASFAA looking for student success stories from each state for the 50<sup>th</sup> anniversary celebrations
- Promote NASFAA 50<sup>TH</sup> anniversary at state events – possible have a table at state conference

**Immediate Past President – Wayne Kruger**  
Executive Board Report  
October 2015

***Why am I here?***

- I am here to continue the good work of the executive board over the past few years in building strong fiscal responsibility, to continue to ensure that FASFAA is on strong fiscal grounds and can continue its mission.

***Goals***

- Continue to review and monitor our investments and strategies
- Finalize updated BP scholarships allocation and administration P&P
- Finalize update fiscal concerns and money management P&P
- Finalize move to central bank accounts, divestment of College Goal funds into separate accounts, and move to e-check and bank cards to make handling payments and refunds

***Accomplishments***

- Working with Gwyn to move over the accounts and set up everything new, getting new bank cards for members and close out old accounts
- Confirmed the reduction in our fee's by 25 basis points

***Recent Activities***

- Just getting started again after stepping back into the role, in the near future I will be putting together some rough drafts of the P&P's as well as work with Gwyn to document our business processes.

**Region II Representative – Kamia “Mia” Mwango**  
Executive Board Report  
October 2015

**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
- Federal Updates (aka Bartnicki Bulletins)

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

**Recent Activities**

The Region II Fall Workshop will be held on November 18, 2015 (changed from October 29<sup>th</sup>), hosted at St. Johns River State College in Orange Park, FL.

- Announcements and the call for registration went out on 10/12/15.
- Possible topics include:
  - Federal Updates
  - State Updates
  - Financial Literacy
  - Career Development/Success
  - Discussion Topics:
    - Enrollment Reporting
    - Gainful Employment
    - Enrollment Management
- The Bonnie Pirkle Scholarship raffle will be promoted at the workshop
- Light breakfast refreshments and boxed lunches are being catered by Panera.

**Region III Representative – Denise Asselta**  
Executive Board Report  
October 2015

***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***

- Emails were sent introducing me as the Region III Representative to all Region III members.
- Region III members were surveyed through email on what topics and information they would like to see at the Region III workshops.
- Emails were sent informing members of the agenda for the Region III Fall Workshop and also to let members know registration was open for them to register for the fall workshop.

***Recent Activities***

- Since this is my first Region III Workshop coming up on November 6<sup>th</sup>, making sure the workshop is coordinated in an organized fashion is very important. This will provide the members of Region III the necessary training they need to perform their financial aid duties. This workshop is a time for members to get together and discuss positive experiences, financial aid issues, and new requirements for financial aid professionals. The workshop will also be a time for financial aid professionals to come together and network as a group face-to-face. My job during this workshop is to make members feel welcome and relaxed which will encourage open communication during the event.
- The Region III Fall Workshop is being held at the Technical Education Center Osceola (TECO) on Friday, November 6<sup>th</sup> from 9:00 am to 4:30 pm.
- Presentations will include:
  - Communication
  - First Generation Students
  - Federal/State Update, Financial Literacy
  - FASFA Completion Rate
  - Verification and Unusual Enrollment.
- Members will be encouraged to participate in the Bonnie Pirkle Scholarship raffle which will take place during the workshop.

**Region IV Representative – Dameion Lovett**

Executive Board Report

October 2015

***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 50 attendees at each 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
- Worked to streamline the P&P for region representatives
- Organized fall region workshop with the following topics:
  - The Magic of Financial Aid
  - Verification
  - Prior Prior Year
  - FASFAA/SASFAA Update
  - DACA
  - UEH
  - State Update
  - Consumer Information

***Recent Activities***

- Conducted a conference call and follow-up calls with other region representatives to ensure the new reps were starting off their term on the right foot
- Encouraged participation in the region workshop agenda by soliciting feedback from region members
- Welcomed new FASFAA members who registered for the fall workshop



**Electronic Service Co-Chair – Christina Acosta-Heritage**  
Executive Board Report  
October 2015

***Why am I here?***

- To continue to learn more about the FASFAA Organization and their data management.
- To network with follow Financial Aid colleagues.

***Goals***

- Increase social awareness of FASFAA through Facebook page: FASFAA Home.
- Increase the number FASFAA Home Facebook page likes from 240 to 300+ by end of AY 2015-2016.
- Obtain Twitter account/social media and increase social presence for FASFAA Organization.
- Request to create a one Electronic Service chair and one Social Media chair to increase FASFAA Organization social presence, YouTube, Pinterest, Instagram, Google Plus+, and LinkedIn.
- Obtain an administrator rights in MemberClicks to be able to contact them and inquire about functionalities and transaction fees/costs.
- Identify and learn about the FASFAA.ORG domain/smtp email server set-up.
- Analyze the usage of Membership Management software – MemberClicks and possibly lowering the cost and/or transitioning to other software such as Wild Apricot.
- To open a discussion in solidifying the definition of an “active” member with a custom profile in MemberClicks.
- Identify if we can lower our Membership Management software cost by requesting a change in our contract level from **level 4** to **level 2**. This can potentially save us \$1,500 from our contract fees in a year (\$125 per month).

	<b>Level 1</b>	<b>Level 2</b>	<b>Level 3</b>	<b>Level 4</b>	<b>Level 5</b>
<b>Pricing (per month) *</b>	\$200	\$250	\$320	\$375	\$500
<b>Custom Member Profiles</b>	300	1,000	2,500	5,000	10,000
<b>Basic Contact Profiles</b>	900	3,000	7,500	15,000	30,000
<b>Current FASFAA Members</b>					
<b>Custom Member Profiles</b>				<b>1,866</b>	
<b>Basic Contact Profiles</b>				<b>35</b>	

***Accomplishments***

- Increased number of FASFAA Home Facebook page likes from 201 to 243 likes.
- Increased number of activities in FASFAA Home Facebook page.
- Understand a little bit of how the MemberClicks works and how we are being charge transaction fees.

***Recent Activities***

- Posted Ryan McNamara’s Welcome Note via site and Facebook.

**Co-Electronic Services Chair – Kris Hatcher**  
Executive Board Report  
October 2015

***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 registration forms:
  - Clock hour
  - Region I
  - Region IV

***Recent Activities***

- Responded to various website / MemberClicks requests.
- Sporadically tweeted financial aid info on Twitter.

**Site Selection / Event Coordinator – Lori Auxier**

Executive Board Report

October 2015

***Why am I here?***

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

***Goals***

- Coordinate Clock Hour Workshop @ Caribe Royale in Orlando, Florida
- Coordinate New Aid Officer Workshop @ Historic Dodgertown in Vero Beach, Florida
- Coordinate Annual Conference @ Hyatt Regency in Bonita Springs, Florida
- Select sites for additional events upon request
- Coordinate additional events upon request

***Accomplishments***

- Clock Hour Workshop has been completed; billing currently under review
- Met with Tracy Misner (former SS/EC) to review contracts
- Met with Tracy Misner, Tracy Wiles and Thomas Vo to conduct on site visitation @ Hyatt Regency in Bonita Springs, Florida

***Recent Activities***

- See above

**Sponsorship Chairs – David Alexander**  
Executive Board Report  
October 2015

***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 encourage sponsors to not only get involved with the conference, but the Clock Hour and New Aid Workshops as well.*

***Accomplishments***

- *Surpassed the 14-15 goal of \$35,000 by \$7,900*
- *Finalized the sponsor prices for the Clock Hour and New Aid Workshops*

***Recent Activities***

- *Started the solicitation for the Clock Hour and New Aid Workshops*
- *Updated the FASFAA Site with the 15-16 sponsor info*