



RIASFAA Conference

October 11, 2017

Business meeting called to order at 9:15am by RIASFAA outgoing President, Ed Maroney

Welcoming Remarks, Ed Maroney, Outgoing President

- Importance of volunteering
 - Committees
 - Running for board positions
- Bylaws will be updated
 - Looking at EASFAA's bylaws for guidelines
- Getting a PO Box for RIASFAA for all mail
- Thank you to Kristi Jovell, EASFAA President for being here
- Announcement of Silent Auction
 - Benefiting Amaral and Pell Scholarships
- Please be sure to review the RIASFAA website, email Melissa with updates to your staff
- Thank you to our vendors for being here today.
- Motion: To approve President's report
- Vote: Motion carried

Treasurer's Report, Stacey Pettella, Treasurer

- Proposed budget copies on tables
- Dues were increased from \$250 per institution to \$300.
- Future conference budget amounts were increased in future proposed budgets
- Motion: To approve budget and treasurer's report
- Vote: Motion carried

Secretary's report, Melissa Donahue

- Motion: To approve minutes from June 2017 conference
- Vote: Motion carried

New Members

- Four new members introduced themselves from
 - Providence College
 - Roger Williams University
 - University of Rhode Island

Installation of New Officers

- Joanna Nagelhout – Treasurer
- Shannon Gallagher – President

- Ed Maroney – Past President
- Anne McDermott – President Elect

College Planning Center, Gail Walker

- College Fair was held September 19 at McCoy Stadium, 4 – 5,000 attendees
- Updates on
 - College Planning Nights
 - FAFSA Completion Nights
 - Round Table event held with area high schoolers and the Commissioner of Higher Education
 - Reach Higher Event – collaboration with College Crusade of Rhode Island

Kristi Jovell – EASFAA president, AVP at Champlain College in Vermont

- Used to work at Suffolk Law, was a part of MASFAA
- Easfaa is strong because of its volunteers – training, prof del, leadership, etc.
- Members who are also on EASFAA – Shannon is RI rep. on easfaa; Gail – on vendor relationship committee; Wynette – past president
- Fill out volunteer form on easfaa, nomination committee will be seeking nominations for pres elect, vp and secretary
- Synergy between volunteering for RIASFAA and EASFAA
- What is happening in easfaa
 - Strategic plan
 - Last one ended in 2015
 - Going to put together a 3 year plan rather than 5 year plan
 - Strategic plan survey got 265 responses, 75% from members
 - Hope to finalize this year
 - Training initiatives
 - Kristi loves training! Believes training is the corner stone of what easfaa provides to members.
 - Used to have one training chair and one committee that was responsible for all training.
 - Four committee chairs, four types of training.
 - Provides the ability to make sure training is available
 - EASFAA leads
 - Focused on leadership and professional development
 - Most by webinar
 - Registrations are on easfaa website
 - Tuesdays at 2
 - Always on Tuesdays at 2pm
 - Webinars
 - Webinars are putting in the training archives on the easfaa website
 - Zach Goodwin – doing the next webinar in October
 - SAR comment code training – annual training
 - In person throughout the region
 - Dates will be announced soon on the easfaa site
 - NASFAA training
 - Offering NASFAA U credentials as in person trainings throughout the region. EASFAA offering it for \$35, get NASFAA voucher for credential test.
 - Annual conference
 - May 6 – 9, 2018 - Sagamore Resort on Lake George in NY.

- May 5 – 8, 2019 – Portland, ME
- NASFAA Regional thought force
 - Efforts are being duplicated through state, region, national levels
 - Where can we collaborate
 - Should state/regional/national associations share same goals; should associations have complete freedom to determine funding prospects; should state/regional organizations combine.
 - NASFAA decide to conclude the efforts of the thought force
 - Allowed nasfaa to start thinking/working more collaboratively.
 - Official nasfaa study is done, but can we work closer with states.
 - What are the ways that nasfaa can help our state associations?

Advancing in the Financial Aid Profession, Kristi Jovell, Wynette Zuppari

- Wynette's Path
 - Started part time in bursar's office at Bryant, became full time the moved to financial aid.
 - Was office secretary at Bryant, then began working with RIAFSAA.
 - Became assistant director, then senior assistant director at Bryant.
 - Became loan office manager at Brown, and has been there for 11 years.
 - Now oversees loans, cashier's office, bursar at Brown
- Kristi's Path
 - Started as a FWS student in financial aid
 - Got a job as admissions counselor right out of college
 - Assistant director of financial aid at the same college left right before packaging season. VP decided to promote her to the position, and she was not happy.
 - Associate director of financial aid at Hobart
 - Then relocated to Boston
 - Associate director at Suffolk
 - Was not ready to be a director!
 - Then after a few years, became Director of Financial Aid at Suffolk Law
 - People advocated, had a great reputation at the school!
 - Now at Champlain in VT, AVP position
- Are you not advancing because you truly are not ready, OR because you are AFRAID??
- Advancing boils down to three things
 - What you know
 - Training and education
 - Nasfaa daily news, IFAP, FSA
 - Webinars
 - Offer to take on new tasks in office
 - Conferences
 - NASFAA credentials
 - Leadership development
 - Higher degree?
 - Who you know
 - Professional development
 - Expand your professional network
 - Volunteer
 - Attend events, receptions, make connections
 - Get involved on your campus

- How you act
 - Intentional career building and executive presence
 - Easfaa leads series
 - Opportunites on your campus from HR
 - NASFAA career center
 - Be resume ready
 - Executive presence – how do you show up?
 - Prepared? How are you dressed? Are you “dressing for the job you want, rather than the job you have”?
 - Leading an office means from going from an expert to the leader/manager and taps a different skill set
- How to determine if you are director ready?
 - Title IV
 - Having connections outside the campus/other offices
 - Look forward to challenges of having your own office?
 - Ready to devote TIME to the position?
- How do you prepare to be a director?
 - Know your stuff
 - Develop professional contacts to call with questions
 - Become a mentor
 - Take advantage of professional development opportunities
 - Love what you do and keep up with the industry
 - Seek a position that is a good fit
 - Be patient for the “right” position.
- How to prepare for the interview
 - Cover letter/resume updated
 - Research the school
 - Practice questions and prepare your own
 - Look and dress the part
- Tips on success
 - Happy staff
 - Don’t forget about office professional development, contacts and training
 - Primary focus is serving students – don’t forget!!!
 - Be nice to other offices and colleagues!!!!!!!!!!!!!!!!!!!!
 - Stand behind your team – support them

Federal Update, Pam Gilligan

- Nothing super new, once Jeff Baker left, a lot of things coming out of DOE started to slow down.
- Cynthia Hammond, Craig Munier - doing the policy work on DC
- Borrower Defense rules
- Gainful Employment rules
- Pell
- COD Changes
- Pell restoration
- Cancelled Enhancements
 - No DRT for non-filers
 - No mix up of school codes for state agencies
- DRT changes

- Masked income info
- “Transferred from IRS” is the data that parents/students will see, we’ll see the figures
- Special provisions for rollovers – YAY!
- Wages fields will have to be entered manually
- New set of flags referring to any information that may have been changed after a DRT
- New SAR comments – 400 and 401
 - EA for august 7, 2017 explains this info
- Amended tax returns can be used for DRT
 - Original tax return is imported, then we have to request 1040X transcript
- Verification
 - V6 is gone
 - Snap and child support removed from V1, V4, V5
 - Dependent students do not have to provide proof of non-filing from IRS
 - Auto zero
 - Dependent, parent AGI only; high school completion if it is V4 or V5
 - Independent, student/spouse AGI only; high school completion; household size
- Perkins
 - No new perkins!
- NSLDS enrollment reporting
 - Program level enrollment reporting
- Protecting student information
 - Protect data used to administer title IV student financial aid programs
- Dept of homeland security and eligible non-citizens
 - Require third step verification of eligible non-citizen students
 - There is a video online for training
- Major Disasters
 - IFAP – disaster assistance guidance
- Training
 - FSA Coach 17/18 advanced training course
 - Fundamentals workshops
 - 399 updates – 2017/2018 will continue

Comparing Income Driven Repayment Plans, Wynette Zuppari

Repayment plans

- Standard
- Graduated
- Extended
- Income contingent
- Income based
- Pay as you earn
- Revised pay as you earn (2015)

As of March 2016, 4.9 million dl borrowers enrolled in IDR

Several different plans, different eligibility requirements, monthly payment calculations, etc.

Silent Auction winners announced, 50/50 raffle winners announced

Adjourn 2:03pm

