

Activities planned but not yet completed:

Progress on committee's 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

IV. Old Business

V. New Business/Exiting Business

Randy - the auditor needed additional materials – Val will be getting him all that ASAP
Once they have this information a report will be out to small group for review and then
a report back to entire Exec group

OASFAA has a You Tube channel

Amada R. is attending one of the forums the Fed's is having

VI. Reports

1. Regional Representatives

a) Northeast

Jenn Kessler

Summary of activities:

- A few more email reminders went out for Outreach for financial aid presenter requests per Christy's request from Outreach.
- Collected feedback from meeting and everything was positive. The only suggestions were regarding different topics to cover for the next meeting; SAP, R2T4 for modules, using NSLDS, federal updates & Professional Judgment. The only other question that came up was regarding certificate of attendance for the meeting. Asked Matt about this and it was discussed it may be a good idea to offer those certificates for all trainings.

Suggestions for meeting in March was taken by participants
Mentioned NASFA and R2T4

Activities planned but not yet completed:

- Regional sessions at December conference. Thoughts on having lighter topics to discuss. Possibly have activities that help people make more connections within the organization.

Progress on committee's 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

b) Northwest

Tony Leprotti

Summary of activities:

Meeting was rescheduled
Will be similar to Jenn's meeting
14-15 FAFSA changes will be added

Activities planned but not yet completed:

Progress on committee's 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

c) **Southeast**

Trushonda Carmicle

Thanks to all for assisting with my transition to Exec
Working with Angel Harmon & Becky for support professional meeting & regional meeting together

Need access to online to get e mail message out to SE

Randy to Betsy can you work with Trushonda to get access via ATAC

d) **Southwest**

Cheryl Jackson

Summary of activities:

- Summary of activities: The southwest regional fall meeting was held on Friday, October 18th at Wittenberg University. The meeting was well attended by 26 financial Aid administrators and lenders from Cincinnati, Dayton, Urbana, Cedarville, St. Martin, Wilberforce, and Springfield Ohio. The completed meeting surveys indicated that the participants believed it was time well spent, and all involved acknowledged the fellowship we shared as financial aid administrators.
- A representative from Sallie Mae discussed the new 150% subsidized loan limit, as well as results from their survey "How America Pays". There was a round table discussion on the different ways each institution handles verification, as well as the pros and cons of their system. Randy Green talked about OASFAA and the upcoming winter conference, which encouraged non-OASFAA members to join. The meeting ended with a motivational speaker from Wittenberg University

Had folks come up to me after and inquire on how to join OASFAA

Activities planned but not yet completed:

- Southwest spring OASFAA meeting, April 2014 at Wittenberg University (topics to be determined)

Meeting will in March not April

Progress on committee's 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

2. **President-Elect**

Angela Johnson

NO MASFAA update
promote summer institute

a) **Associate Member Relations**

Michele Barry/Mary Lynn Perri

Summary of activities:

- We continue to keep up with notifications to encourage vendors to sign up for conference and will begin notifications about set-up, mailing materials, and the invite for dinner

Rsvp sent out today for dinner

Mentioned focus group

Activities planned but not yet completed:

- Sub-committee meeting to discuss different sponsorship opportunities is scheduled for November 5th

Progress on committee's 2013-14 goals/initiatives:

- We currently have 17 exhibitors committed for conference. This is the same amount as last year. We are hoping to get at least 1-2 more.
- Sponsorship currently totals \$21750. We have met our budget goal of \$21000!

Recommended items for discussion by Executive Committee:

b) **Communications/Web**

Betsy Johnson

Summary of activities:

- Approval of positions has occurred as requested by members.
- Requested ATAC to add Facebook information as a footer to all listserv emails, which has been completed

Nothing has changed

Request form

Whole list serve has

Waiting on link for newsletter (to send it out to OASFAA members)

Activities planned but not yet completed:

Progress on committee's 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

c) **Finance**

Angela Johnson

Increase to members as early as 2015

doing research in the Midwest (Missiour) has an individual as well as institution membership fee

membership dues hasn't been increased in several years this will be brought to finance committee shortly

sponsorship membership:

there was a get together earlier this week for sponsorship/rework

focus groups at Winter Conference 2013 – to get input from sponsors

discussed pulling out the open sponsorship separate

going back to what we have had in the past

added recognigaiton in the ballroom (styrofoam board also at meals)

Venus – can MOHELA still be available to print materials needed for Needs Analysis
 Mary Lynn: MOHELA has given an “open” sponsorship
 Go back to open sponsorship form / do a revision for what their open sponsorship is
 Jeff J. anyway the organization can raise money – support 100%
 Betsy J. caution on having one vender be allowed to designate what their “open”
 sponsorship is designated for

Randy to Venus – what would cost of materials be?

Angela – go back to lender and ask them if we use the open sponsorship with open printing

Randy we (OASFAA) print Needs Analysis documents and we OASFAA use the funds donated as “open” sponsorship – if MOHELA

d) **Membership**

Jayme Jarrett/ Leann Kenszerski

Summary of activities:

Sent e mail this morning 11/8 regarding numbers

641 current members

51 for 2014 with conference

Requesting pictures for conference for new members session

Whats going on in the region

Baby pictures / who was around the in early years

Get a list of who comes to regional workshop / see if members & invite those who are not to become members

angela – update on the outreach

Jayme - still working on that – has fallen to the way side ... have scene memberships from schools that have not been around for a while

New/Renewal Memberships	
2014 New Memberships	2
2014 Renewal Memberships	49
Membership by Year	
2014	51
2013	641
2012	698
Institutions with Current Memberships	
Total	213

Activities planned but not yet completed:

Progress on committee’s 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

e) Nominations

Angela Johnson

3. Past-President

Cheryl Willard

a) Association Governance and Planning

Stephanie Sutton

b) Financial Review

Cheryl Willard

Nothing to report

c) Regulatory-Federal

Todd Everett

d) Regulatory-State

Kim Jenerette

Summary of activities:

- Met with John Carey (Chancellor), Gary Cates (SR Vice-Chancellor), Stephanie Davidson (Vice-Chancellor), and Matt Whatley (Chief of Staff) and discussed the possibility of additional state aid programs.
- Have spoken with aides for State Representative Cliff Rosenberger and State Senator Randy Gardner regarding a meeting to discuss state aid programs for our high school students. Awaiting to hear back for a possible meeting with both either this month or in December.

Did speak with legislative aids this last week – waiting to hear back for meetings
Hopefully this month meeting with legislative reps to move forward

Activities planned but not yet completed:

- Meet with John Carey, Chancellor of the Ohio Board of Regents (10.08.2013)
- Meet with Governor Kasich
- Meet with State Legislators (should be November or December)
*the purpose of meeting with various leaders across the state is to plant seeds in hopes that we produce sufficient state funding for Ohio high school graduates. The plan to is to garner information from states such as SC, GA, FL, and TN, who all have strong state programs and present this information as a starting point to merit based programs and hopefully feasibility studies by our elected legislators.
- Learn more of College Advantage and various Foundations throughout the state and begin to work with them to determine areas germane to financial aid.
- Work with the OASFAA Board on the default mechanism within the FAFSA in regards to asset questions

Progress on committee's 2013-14 goals/initiatives:

- See #1 above

Recommended items for discussion by Executive Committee:

- Being new to the state, recommend 1-2 individuals to serve on this committee (preferably with a strong background in FA and/or with our state legislators) (I spoke with and emailed Don Chenelle but as of the submission of this report (10.12.2013) I have not heard back). I will continue to move forward regardless.

4. VP-Conferences

Andrea Morrow

a) Conference Planning

Andrea Morrow

Summary of activities:

- We are at 151 registrants (as of 10/31/13) for the Winter Conference in December. Registration without a late fee is until November 22, after this date a \$50 late fee will be assessed to member invoices. Hotel room reservation deadline is November 19th at a cost of \$116 plus tax. To compare, reported at the 11/2/13 executive meeting, we were at 148 registrants
- Bev and Brett have established room assignments for interest sessions. They are looking for AV equipment donations. If your school is able to donate laptops, projectors, or both, please contact Bev at bdalheim@lakelandcc.edu or Brett at brett.fields@franklin.edu. Borrowing equipment saves the organization from being charged to rent via the hotel.
- Greg and Scott are tying up loose ends with entertainment and charity logistics. We are asking that gently used or new toys be donated at winter conference. The selected charity is the Boys and Girls Club and a representative will be on site to accept all donations. Entertainment will consist of a live band and a costume contest.
- Ann Marie is diligently working on the program and near our first draft to be shared and edited. It will be online and printed for winter conference. There are a few session descriptions that need to be added, but we are on track with our timeline to print. All moderators should have received the PPT template to be used by

Speaker Steve Morgan lined up

Angela Smith will be staying at another hotel –hotel wouldn't honor government pricing

Eunice Powell – NASFAA training specialist will offer 3 interest sessions

Chancellor John Carey will provide a state update on Friday morning

Activities planned but not yet completed:

- Review and finalize a conference contract for Spring 2013.
- Finalizing conference menu with the Renaissance.
- Recruit on-site volunteer support for packet stuffing on Tuesday night and registration table throughout the conference.

Progress on committee's 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

MorraLee - Whats up for past presidents

Randy - Will be recognizing past presidents at dinner

OASFAA is covering registration for past retired presidents

MorraLee – -Is the system set up to handle a comp ...

Mary Lynn – they will get a message about payment and we will have to manual comp the registration

b) **Registration**

Lea Mederer

178 registrations to date

18 are one day only

Volunteer message out to list serve shortly for volunteering to help run the registration table and stuffing packets the night (Tuesday) before

c) **Entertainment**

Greg Carlo/Scott Lehman

Summary of activities:

No Report

Activities planned but not yet completed:

Progress on committee's 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

d) **Program**

Ann Marie Gruber

working on draft for review

e) **Site**

Bev Dalheim/Brett Fields

Summary of activities:

- Working on Conference details

Activities planned but not yet completed:

Nothing at this time

Progress on committee's 2013-14 goals/initiatives:

Nothing at this time

Recommended items for discussion by Executive Committee:

- Equipment for Conference—if anyone is able to lend OASFAA equipment for Winter Conference please let Brett Fields and Bev Dalheim know. We are in desperate need of equipment.
- If you do not know if your institution will allow equipment to be lent out, ask. You may be pleasantly surprised. Thank you.
We have no laptops at this point
Randy to Brett—do know how many we need

Brett Fields brett.fields@franklin.edu

Bev Dalheim bdalheim@lakelandcc.edu

f) **Leadership**

No class this year

g) **Professional Development**

Lawrence Matthews

Summary of activities:

- Development of content is on-going for two interest sessions at Winter conference. The first session is geared toward new professionals (less than 5 years experience) and the second is geared to seasoned professionals (5 or more years of experience).

Activities planned but not yet completed:

- Winter conference interest sessions.

Progress on committee's 2013-14 goals/initiatives:

N/A

Recommended items for discussion by Executive Committee:

None

5. **VP-Training**

Matt Moore

Summary of activities:

- Had email discussion with the R2T4 NASFAA Trainers (Ann Marie Gruber & Kim Nash-Yore) to ensure they do not need anything from me at this time. Everything is all set.
- I started having conversations to see if there is interest in holding NASFAA training at spring regional meeting sites like we did last year (North/Ashland & South/Central State). My first step was to check if Ann Marie & Kim are interested and I am waiting to hear back

Activities planned but not yet completed:

- Touch base with Eunice and Todd Everett to see if they need anything in preparation for the other NASFAA training.
- Schedule another conference all with the Regional Reps

Progress on committee's 2013-14 goals/initiatives

N/A

Recommended items for discussion by Executive Committee

N/A

a) **College Goal Sunday**

MorraLee Keller/Amanda Reisinger/Carrie Short

Summary of activities:

- Received check from USAFunds
- Waiting on check from Great Lakes
- Hosted 2 New Site Coordinator Orientation Sessions
- Continue Updating CGS Website

- Finished November Counselor Mailing & Posters, Fliers
- Opened Volunteer and Testing Student Registration
- Updated Site Coordinator Checklist
- Distributed Mini-Grant Applications

All the money is

Volunteer registration is open (thank you to those who have already volunteered)
 Randy – has graciously volunteered a Free Spring conference for those who register to volunteer by end of conference

Dec 1 student registration

Randy – reimbursement activity – need original receipts or NO scanned copies for now until we hear from audit

Activities planned but not yet completed:

- Host Site Coordinator Meeting at Winter Conference
- Host Site Coordinator Webinars for those not attending meeting at Conference
- Work with organizations to get CGS links on their websites
- Order T-Shirts
- Open Student Registration
- Prepare January Mailing
- Review and award mini-grant applications
- Do continuous volunteer recruitment

Progress on committee’s 2013-14 goals/initiatives:

Right on track

Recommended items for discussion by Executive Committee

None at this time

b) **NASFAA Training**

Matt Moore

Summary of activities:

Activities planned but not yet completed:

Progress on committee’s 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

c) **Need Analysis**

Venus Puliafico/Ericka Walker-Smith

Summary of activities:

- Finalized PowerPoint presentations for use during 2013 Winter Conference and 2014 Regional Needs Analysis Training Sessions
- Determined committee member assignments for 2013 Winter Conference and 2014 Regional Needs Analysis Training Sessions
 - Presenters assigned for winter conference
 - Site coordinators assigned for regional trainings

Power Point finalized as well as committee assignments
 In a really good place

Randy – are the training session on the OASFAA calendar –
Venus/Ericka will get those loaded – just finalized them the other day

Will ask Matt Moore to get a message out to the group with upcoming
training dates

Activities planned but not yet completed:

- December 12, 2013 – Winter Conference 4 sessions for Needs Analysis
- January 31, 2014 – Regional Needs Analysis Training Sessions (10a – 2p)
 - NW and SE regions
 - Logistics and communication plans for inclement weather are works in progress
- February 7, 2014 – Region Needs Analysis Training Sessions (10a – 2p)
 - NE and SW regions
 - Logistics and communication plans for inclement weather are works in progress

Progress on committee's 2013-14 goals/initiatives:

- 50% on communication plan

Recommended items for discussion by Executive Committee:

- Discuss MOHELA's willingness to print training material and pay for lunch at each site

d) **Outreach**

Jeff Johnston/Cody McMillen/Christy West

Summary of activities:

- Registration is "live" for the OASFAA Counselor Workshops in December. The Counselor Workshops are scheduled for December 4-6 and 9-10. In addition to emailing workshop reminders to various listserves, we also have mailed a postcard reminder to 1000 high schools in Ohio. We currently have 592 high school counselors/access staff registered for the workshops.

counselor registration up to 650 (in 2012 had around 800)

Couple of locations that were cut – haven't noticed any loss of attendance in those areas

Post card was sent to every HS which hasn't been done in several years

Committee is meeting today 11/8 to work on power point

HS nights – Christy is managing up to over 20

Lawrence will be helping with a 101 Webinar (21st of November)

Working on getting that promoted

Activities planned but not yet completed:

- We are meeting via conference call on the afternoon of November 8 to create the Powerpoint presentation for the Counselor Workshops.

- We are also planning a “Financial Aid 101” webinar for new high school counselors that will be held prior to the December workshops. We are hoping to hold this webinar on November 21 in the afternoon.

Progress on committee’s 2013-14 goals/initiatives:

- Articulation events are completed for 2013-14 and work on the Counselor Workshops in December is ongoing. We also have continued to receive requests for financial aid nights for various high schools through the OASFAA Counselor’s page and have worked with various individuals and institutions to provide speakers for those events.

Recommended items for discussion by Executive Committee:

- e) **Support Professional** Mary Cannon/Angel Harmon/Becky Davis
North meeting set at BG Firelands 20th of November
South meeting set at Franklin University 21st of November

VII. Liaisons

- a) **Board of Regents** Tamika Braswell

HEI training next Friday in Columbus around 40 people

- b) **OACAN** MorraLee Keller

Summary of activities:

Next addition of 101
3 sites who have taken advantage of FAFSA completion site
OACAN has paid the fee for this (will monitor to see if we would want to add any more) - EDU guide

Randy to MorraLee any feedback to excluding financial aid OAC – articulation meeting – adding
Jeff Johnston - we have never been given any feedback
Randy to Cheryl Willard – could you informally reach out Ross Grippi

Activities planned but not yet completed:

Progress on committee’s 2013-14 goals/initiatives:

Recommended items for discussion by Executive Committee:

VIII. Adjournment—Tony L.