

TASFAA

ANNUAL REPORT 2019

TEXAS ASSOCIATION OF STUDENT FINANCIAL AID
ADMINISTRATORS



Table of Contents

- 02 - TASFAA Mission Statement and Vision Statement
- 03 - President's Letter
- 08 - Conference Agenda
- 09 - Conference Activities
- 11 - Past President Report
- 12 - Community Service
- 13 - Awards and Scholarships Committee
- 14 - Nominations and Elections Committee
- 17 - Legislative Issues Committee
- 22 - Communications and Social Media Committee
- 23 - Membership Committee
- 24 - Fall Conference Committee
- 25 - NASFAA Credential Committee
- 26 - Regional Training Committee
- 28 - Site Selection Committee
- 29 - TASFAA Mentor/Protege Committee
- 30 - Early Awareness Committee
- 31 - Training Committee
- 36 - Web Services Committee
- 37 - Operating Reserves Task Force
- 38 - Aspiring Director Task Force



TASFAA Mission Statement

The Texas Association of Student Financial Aid Administrators (TASFAA) advances student access to higher education by providing professional development for its diverse members, advocating for informed public policies, and facilitating forums on financial aid topics.

TASFAA Vision Statement

TASFAA will serve as an exemplar for promoting student access and success in higher education while also providing excellent professional development opportunities for its members.

PRESIDENT'S LETTER



Dear TASFAA members!

My heart is full of gratitude to all the support I have received from the board, committee chairs/co-chairs, committee members and TASFAA members. You have worked hard; you provided input, disagreed with me and trusted me to lead this organization.

I wanted to express my thanks to many!

I would like to say a special thank you to my husband Jack; for being there with me this past year, as I continued working in a demanding position at Texas A&M, worked on improvements with my team for the 2019-2020 aid year, served as TASFAA President, planned our daughter's wedding and helped maintain our family farm.

In addition, I have a special thank you my team members who are held down the office in Aggieland and our other campuses.

My team members support a university with 70, 000 students, \$836 Million dollars in financial aid...which assist-undergraduates, graduates' students, law students, medical students, veterinary students, dental

students, pharmacy students, and 2 branch campuses. This is no small task. I appreciate each and every one of my team members and all they do! I am blessed to work with a dedicated and student-centered group of folks.

TASFAA is sometimes considered unique because of the size our state, the many leaders who go on to be NASFAA Chairs and how well we do things including this fall conference. I would argue what makes TASFAA unique is each one of you; each of you bring a different talent and passion to our industry.

You take a group of talented people, thousands of miles apart from each other in some cases, from different school sectors, school sizes and different school missions; and they do amazing things that benefit TASFAA members, institutions, the state and nation and most importantly students in this great state of Texas. TASFAA members I am referencing your board, your committee chairs/co-chairs and your committee members who have served TASFAA this year.

In review of the work of these talented people during 2018-2019 I have to say how blessed I was to work with an amazing group of people. In continuation of TASFAA's three-year strategic plan of 2017-2020, established goals to develop the professional skills and expertise of student financial aid administrators in the State of Texas I will speak to contributions and efforts made.

A task force was formed and led by Carolyn Jones along with Zelma DeLeon and Lyn Kinyon they developed the inaugural Aspiring Directors track for this year's annual conference to the support the development of our future leaders. Thank you for those who have stopped me and told me how much you have learned from the new aspiring directors track. I hope TASFAA can continue to provide this opportunity in the future.

Another key TASFAA objective related to TASFAA's goals was to increase offerings of NASFAA Credentialing. I am pleased to report that this year at the Regional training sites; the NASFAA Credentialing module for Satisfactory Academic Progress was provided. NASFAA credentialing was well received at all training sites. Thank you to our two Regional training co-chairs, Christy Miller and Heather Fountain.

For the second year in a row, TASFAA continued to provide additional opportunities for NASFAA Credentialing during our pre-conference. I would like to thank Christy Miller who has led this charge from the initial stages of researching the possibility of providing NASFAA credentialing to TASFAA members, as well as being a trainer on various NASFAA Credentialing topics.

A second goal of TASFAA's strategic plan was to lead and facilitate the development of informed policies related to effective student financial aid programs and improvement of student access and success at institutions of higher education.

This past year we were able to provide Financial Aid 101 presentations to approximately 40 staffers at the State Capital. The Legislative Issues committee led by Alan Pixley and Zelma DeLeon worked on positions papers and dissemination of information related to the legislative session updates. Input from TASFAA members was sought during this past legislative session for development of these position's papers. We thank you for your valuable input. In addition, I provided letters of introduction of TASFAA as a resource on financial aid programs to a number of state legislators.

Dr. Christopher Murr, Mr. Jimmy Parker and I provided a letter for support for SB 499 this year and were present at the state capital in support of this bill. We were also able to thank Senator Seiliger for this bill, which clarified for schools that alternative loans were not intended to be

included in the new annual debt letters provided to students as required in SB 887.

The third strategic goal of TASFAA was to ensure finances are managed for the long-term fiscal health of the Association while also using funds to develop initiatives that will better meet the needs of the association members.

I asked Dr. Christopher Murr to lead the Operating Reserves Task Force and provide recommendations to the board regarding the appropriate balance of funds to maintain in TASFAA's checking account. After research and working with Tia Clary, TASFAA's accountant, Dr. Murr provided recommendations to the board of the target minimum of operating reserves to equal at least six months of average recurring operating cost. This recommendation was approved by the board and placed in the Policies and Procedures manual.

In addition, to what I have noted, TASFAA committees continued their work on annual events, such as New Aid Officers Workshop, TASFAA ABC's, Regional Training. Working to educate high school counselors through Early Awareness, selecting the next sites for the annual TASFAA conference and New Aid Officers, Membership renewals and soliciting new members, Nominations & Elections for our next leaders of TASFAA, Awards and Scholarships to recognize those who have served in this industry and those who have excelled in various areas, communicating to members via the list serve, mentoring via Mentor/Protégé committee to new members and ensured financial records were in order through Treasurer reports, and not to mention minutes of each board meeting so you the members are in the know of interworking's of TASFAA.

Lastly, shortly after last fall 2018's conference, ATAC our long-standing web provider announced they will be closing their operations after 25 years in November 2019. ATAC has been a wonderful partner with TASFAA

for many years and we appreciate all they have done to support us. The board reviewed demonstrations and bids from several providers and selected MemberClicks, as our new web service platform. This web platform is much more robust, I believe you as members will be very happy with our new web platform. I want to express my sincere appreciation to Kevin Armalay our web services chair who has led this effort from the start. He has done an amazing job!

A year goes by very fast, there is much to do and time is not on your side most days. It has been an honor and privilege to have led and served TASFAA as President. The board, committee chairs, committee members worked hard for TASFAA all year. I am amazed at all of these individuals. Please join me once again in thanking them for their service to TASFAA. TASFAA needs more volunteers, more folks ready to step up and run for the board, president elect, and president. TASFAA needs you the members to continue all the good it does for all TASFAA members.

TASFAA members continue to do amazing work at your institutions daily to help educate Texas, by providing the financial resources that so many Texas students need to assist them with obtaining their educational goals.

I leave you with this quote by Lyndon B. Johnson who signed the Higher Education Act of 1965 on the campus of Texas State University, in San Marcos, Texas.

Poverty must not be a bar to learning and learning must offer an escape from poverty.

Best regards to all of you!

Most sincerely,

Delisa Falks

TASFAA President 2018-2019



Conference Agenda

General sessions included a Federal Update Provided by training officers Kevin Campbell, Trevor Summers, and Rick Renshaw of the U.S. Department of Education; a State Update provided by Deputy Assistant Commissioner Dr. Charles W. Puls of the Texas Higher Education Coordinating Board (THECB); and a NASFAA Legislative Update provided by National Association of Student Financial Aid Administrators (NASFAA) President and CEO, Justin Draeger, via Zoom.

There were 29 interest sessions offered including 4 sessions from the U.S. Department of Education, 3 from the THECB, and 2 relating to scholarship administration. Additional topics included fraud, identity theft, refinancing student loans, audits, factors that impact student success and wellness, and a student panel. The conference also provided a New and Aspiring Aid Directors track. Most sessions were presented in a panel format. Topics for panelists included authorities to whom a director reports, overall responsibility for department functions and compliance, personal and professional management, and a Q&A.

The TASFAA Awards presentation and annual business meeting were held during the Thursday luncheon at the Hilton Fort Worth.



Conference Activities

Our keynote speaker, Robin Roberts, provided us with the opportunity to connect with one another and share the gems that we learned from the interest sessions we attended. Attendees who participated submitted their gem cards and a drawing was held for a weekend get-away (courtesy of Robin) to one of 52 locations in the United States. Hector Ramirez-Roche of UT Austin was the lucky winner!

An exhibitor treasure hunt challenged attendees to visit all our exhibitors. James Guger of Dallas Community College was the first to complete the task and was the recipient of a conference commemorative t-shirt. A second winner was selected from the remaining treasure hunt cards submitted and a drawing was held Friday morning.

A fit-dice event was held Thursday morning to benefit the Mack Adams Scholarship Fund. 12 attendees participated in the event. Members were invited to alternatively make a donation to the fund and receive a commemorative t-shirt, 33 chose this option. Shirts were sold for a reduced cost on Friday, and remaining 50th anniversary shirts from the 2017 conference were sold. A total of \$1,295 was raised for the Mack Adams Scholarship Fund.



Conference Activities

A reception was held on Thursday evening at the Pavilion at Sundance Square. Robin Roberts came back to show us the lighter side of hypnotism.

Special thanks to our sponsors:

- Conference Badges-
- CampusLogic
- Conference Bags- NTHEA
- Conference Afternoon Break-
- Ascendium Education Group
- Conference Breakfast-
- CommonBond
- Evening Event- Earnest
- Conference WiFi- Earnest,
- West & Partners Consulting, SixUp

A conference evaluation seeking attendee feedback was sent within two weeks of the conference.

Results will be provided to the 2020 Fall Conference Committee.

Past President Report

By: Christopher D. Murr

The work of the past President over the last year includes, but is not limited to, the following:

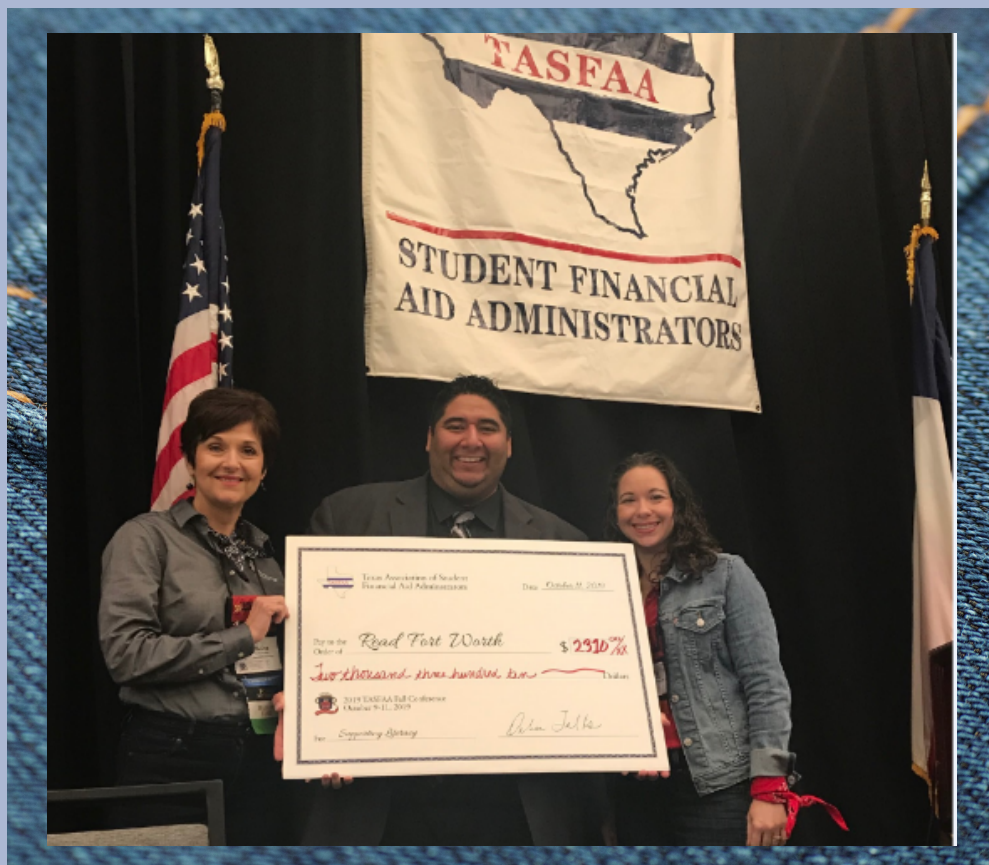
- Led the Operating Reserves Task Force and implemented its recommended changes to the Investment Policy section of the TASFAA policies and procedures (as approved by the board).
- Testified on SB 499 (student loan debt notice) before the Texas Senate Higher Education Committee.
- Wrote and submitted a follow-up letter regarding the testimony delivered on SB 887 in August of 2018 to the Texas Senate Committee on Higher Education. The letter was sent to the staff of committee members and further addressed the recommendations to enhance SB 887 (i.e., a centralized student loan debt letter model). Included with the letter was marked-up bill language for implementing these recommendations.
- Attended other committee hearings (e.g., Texas House Committee on Higher Education) and was prepared to testify (as needed) on financial aid related bills.
- Drafted a letter in support of the existing set-aside funding for the TASFAA president to use as appropriate with the Texas Senate and House committees on higher education.

Community Service

The Fall Conference Committee selected Read Fort Worth as the non-profit to support in our host city. Read Fort Worth seeks to ensure that 100% of Fort Worth third-graders are reading to learn – not learning to read – by 2025.

Funds were raised through the sale of raffle tickets (\$1,741) and Denim Days stickers (\$569).

A total of \$2,310 and 237 books were donated to Read Fort Worth on behalf of TASFAA. Alexander Montalvo of the Read Fort Worth organization was on hand to receive a ceremonial check, and funds were mailed to the organization the week following the conference.



Awards & Scholarships Committee

Chair: Dede Gonzales - Texas State University

Vice Chair: Diana Martinez - UTSA

Committee Members: Shelley Franks (Tyler Junior College), Carolyn R Mallory (University of Houston - Victoria), Bryan Rivera (Texas Lutheran University), Christy Rosson (Texas Tech University), Renee Urian (University of Texas at Austin), Zarita Barton (Lone Star College System), Denise Welch (Panola College), Bethany Bowman (Rice University), Paula Thomas (Parker University)

Accomplishments of the Awards and Scholarships Committee for 2018-2019:

- Reviewed applications and awarded 6 Mack C. Adams scholarships for the New Aid Officers Workshop in May 2019
- Reviewed applications and awarded 7 Mack C. Adams scholarships for the ABC Workshop in October 2019
- Created procedures for all committee functions
- Solicited nominations for the TASFAA Awards
- Selected John Flores – Texas A&M University for the Financial Aid Star Award
- Selected Danielle Kaplan – University of Texas at Austin for the Financial Aid Support Award
- Selected David Krause – formerly St. Mary's University for the TASFAA Hall of Fame – Unsung Hero Award
- TASFAA Board selected Danchees Ingram – UT Southwestern for the TASFAA Trailblazer award
- Ordered plaques for all award recipients and the President's plaque
- Determined the 2019 service pin recipients. Pins were given out at the fall conference for those in attendance, remaining pins were mailed in October.

Nominations & Elections Committee Report

The work of the committee over the past year includes, but is not limited to, the following:

- Developed the nominations and elections timeline and related matrices for presentation to the Board.
- Solicited nominees for the 2019-2020 TASFAA Board of Directors elections process.
- Presented slate of candidates to the Board.
- Once approved by the Board, requested a statement of candidacy, biographical information and photo from each candidate.
- Notified the TASFAA community of the slate of candidates (via the TASFAA listserv, blog and website).
- Opened the balloting process for the 2019-2020 TASFAA elections for the president-elect and board member (at-large) positions.
- Closed the balloting process and tabulated the votes.
- Notified those selected and not selected to serve.
- Informed the president of the election results.
- Notified the TASFAA membership (via listserv) of the election results and requested that the results be posted (via the appropriate committee chairs) to the TASFAA homepage and blog.

Nominations & Elections Committee Report

Those elected to office are as follows:

President Elect - Taryn Anderson –University of Dallas

Board Members (At-Large):

Cynthia Butler – Dallas County Community College District

Dede Gonzales – Texas State University

Jael Perez – University of Texas – Rio Grande Valley

Christina Pikla –Trinity University

Pending Activity: Disposition
of the ballots in November.

Board Action Requested: N/A

Comments: N/A

Submitted By: Christopher D. Murr

Nominations & Elections Committee Report

Purpose:

The Legislative Issues Committee will work with the Congress, Department of Education, Texas Legislature, Texas Higher Education Coordinating Board, and other entities to communicate the opinions of the Association on any legislation or other issues that may affect the Association or profession. This committee will report to the Board, as well as its members, on matters regarding any relevant laws, regulations or proposed legislation.

Various Activities:

The Legislative Issues Committee had an exciting active year. The committee met throughout the year to review matters regarding federal and state laws, regulations or proposed legislation. A primary focus was to review and track the proposed legislation for the 86th Texas Legislative session (January 1, 2019 – May 27, 2019).

As the 86th Texas Legislative session wrapped up, the committee continued to monitor federal legislative updates, and notify TASFAA president/Board of concerns. Committee members and TASFAA members are encouraged to sign up with NASFAA's Advocacy network to go with NASFAA employees to Capitol Hill:

https://www.nasfaa.org/Advocacy_Pipeline

Legislative Issues Committee

Co-Chairs:

Zelma DeLeon, University of North Texas

Alan Pixley, Collin County Community College

Vice Chair:

Cynthia Butler, Dallas County Community College District TASFAA Board Liaison

Diane Todd Sprague – University of Texas at Austin

Committee Members:

Chrisana Black, University of North Texas

Worth Ferguson, Lone Star College System

Garrick Hildebrand, University of North Texas at Dallas

Jimmy Parker – Panhandle-Plains Management & Service Corp.

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Legislative Issues Committee

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https://www.nasfaa.org/Advocacy_Pipeline

The Legislative Issues committee worked on two position papers for support:

1. SB 34 (Maximum number of semester credit hours for TEXAS Grant) TASFAA While Paper Letter was created by TASFAA President and sent to Deputy Assistant Commissioner, THECB. In TASFAA's view, this legislation would limit the neediest students from receiving funds needed to cover educational expenses, which will affect retention and graduation rates for the neediest students receiving TEXAS Grant. **GREAT NEWS:** The bill did not pass.

2. SB 241 (fka SB 499 - Private Loans added to Student Debt Disclosures) was created for the TASFAA President to send to The Honorable Kel Seliger. TASFAA believed clarifying language would alleviate questions and confusion that has risen concerning types of loan debt that need to be disclosed to students. Dr. Christopher Murr, Mr. Jimmy Parker and Delisa Falks provided the letter for support for SB 499 and were present at the state capital in support of this bill. They were also able to thank Senator Seliger for this bill. **GREAT NEWS:** The bill (SB 241 – fka SB499) passed.

Legislative Issues Committee

TASFAA members were notified by listserv the position papers were posted on the TASFAA's Legislative Information & Positions Paper website under the 2019 86th Texas Legislative Session. Several questions from TASFAA members regarding the information were directed and answered by the co-chairs.

The committee sent TASFAA membership updates on critical pieces of legislation and also provided memberships with a summary of the legislation that passed once the session was concluded:

1. HB 3 – FAFSA/TASFA for High School Graduation – Beginning with the 12th grade level during the 2021-2022 academic year, HB3 requires a high school student to complete and submit the FAFSA or TASFA prior to graduation and includes options to waive this requirement. Language from HB 535 not SB 1323

(<https://capitol.texas.gov/tlodocs/86R/billtext/html/HB00003F.htm>)

2. HB 2140 – Electronic Texas Application for State Financial Aid (TASFA) – Beginning with applications submitted for the 2022-2023 academic year, HB 2140 requires the THECB to establish an electronic submission portal for the TASFA.

(<https://capitol.texas.gov/tlodocs/86R/billtext/html/HB02140F.htm>)

Legislative Issues Committee

3. SB 1504 - BOT - set-aside distribution for performance-based funding.

(<https://capitol.texas.gov/tlodocs/86R/billtext/html/SB01504F.htm>)

4. SB 16 – Student loan repayment program - assistance for certain peace officers.

(<https://capitol.texas.gov/tlodocs/86R/billtext/html/SB00016F.htm>)

5. SB 37 – Student loan default - Prohibits the use of student loan default of a student loan repayment as a grounds for refusal to grant or renew an occupational license or other disciplinary action in relation to an occupational license.

(<https://capitol.texas.gov/tlodocs/86R/billtext/html/SB00037F.htm>)

6. SB 241 (fka SB 499) – Student Debt Letter – clarified that institutions are not required to provide Private Student Loan data to be included in the Student Debt Letter.

(<https://capitol.texas.gov/tlodocs/86R/billtext/html/SB00241F.htm>)

7. HB 3808- Texas WORKS Paid Internship Program – Authorizes the THECB to create a program that will generate internship positions across the state. The program is to be funded using the current TCWS funding from the 205 community service requirement.

[https://capitol.texas.gov/Search/DocViewer.aspx?](https://capitol.texas.gov/Search/DocViewer.aspx?ID=86RHB038085B&QueryText=%22HB+3808%22&DocType=B)

[ID=86RHB038085B&QueryText=%22HB+3808%22&DocType=B](https://capitol.texas.gov/Search/DocViewer.aspx?ID=86RHB038085B&QueryText=%22HB+3808%22&DocType=B)

Legislative Issues Committee

The committee also sent TASFAA membership a summary of the regulatory change regarding gainful employment and the ability to implement the reversal of these regulations early.

The Legislative Issues Committee members would like to thank TASFAA members for their support and valuable input.

Communications and Social Media Committee

Committee Members:

Chair: Trent Smith - Texas A&M University
Darian Condarco - Texas Tech University

Responsible for the administration of the TASFAA Star Blog and TASFAA LinkedIn site.

TASFAA Star (cumulative totals)

- Subscribers: 592
- Posts: 94
- Hits: 30,415
- Pages/Views: 12,515
- Unique Visitors: 5,731
- Hits per Unique Visitor: 5.31
- Pages per Unique Visitor: 2.18

TASFAA LinkedIn

- Members: 139

Membership Committee

List of Committee Members:

Chair: Donnie Purvis

Co-Chair: Keith Hoelscher

Board Liaison: Zelma Deleon

Ana Chavez

Jason Edens

Luanne Decker

Committee Activity (events, statistics, meetings, etc.):

168 Memberships paid.

Budget is for 156 memberships or \$39,000.

Some final numbers.

133 Institutions with 2,012

staff members

37 Associate members with

153 individual members

New to TASFAA

Amberton University

Campus Logic

Cognition Financial/Suntrust

College Raptor

Earnest Loans

ProEducation Solutions, LLC

West & Partners

Consulting, LLC

Submitted By: Donnie Purvis

Fall Conference Committee Report

Conference Chair: Nora Cargo, Texas A&M University

Co-Vice Chair: Dede Gonzales, Texas State University

Co-Vice Chair: Michelle Toney, University of Texas at Arlington

Members: Taryn Anderson, University of Dallas, Zarita Barton, Loan Star College System, Norma Belmares, Texas State University, Dominique Candley, Houston Community College System, Stephanie Castillo, Tarrant County College, Christine Gauger, University of Texas, Sergio Gonzalez, Sallie Mae, Alberto Hernandez, Texas A&M University- Corpus Christi, Vanessa Negrete, Texas Tech University, Jael Perez, University of Texas- Rio Grande Valley, Christina Pikla, Trinity University, Eddie Sanchez, Texas Tech University, Cathy Sarabia, Texas Tech University

The TASFAA 2019 Fall Conference was held October 9-11 at the Historic Hilton Fort Worth Hotel in Fort Worth, Texas. The conference theme, “Denim, Dollars, & Decreasing Debt,” reflected the roots of our host city and was woven throughout the conference activities. Two National Association of Student Financial Aid Administrators credentialing (NASFAA U) sessions were offered free of charge as pre-conference workshops: Consumer Information and Packaging. A total of 382 attended the fall conference. We had 32 organizations as exhibitors and were pleased to have hosted an “Ask the State” table for members to visit with staff from the Texas Higher Education Coordinating Board (THECB). The conference kicked-off with an opening keynote session from Robin Roberts from The Mind Powers... Robin provided us with an inspiring and thought-provoking demonstration of how we are all connected - to each other, to our students and families, and to our own amazing minds

NASFAA Credential Committee

Committee Members:

Chair: Christy Miller, Texas Tech University

- NASFAA Credentialing Task Force coordinated 3 separate NASFAA Credential Training opportunities for the membership in 2018-19. All trainings were offered free of charge to TASFAA members.
- This year's credential training topics included Satisfactory Academic Progress (SAP), Packaging & Notification of Awards, and Consumer Information. SAP was offered at all five regional training sites – Houston, Dallas/Ft. Worth, Austin, El Paso, and Lubbock.

Number of attendees per site is as follows:

Training	Site	Attendees
Satisfactory Academic Progress (SAP)	Lubbock	49
	El Paso	22
	Houston	69
	Austin	76
	DFW	125
Packaging & Notification of Awards	Conference	61
Consumer Information	Conference	41
	TOTAL	443

The cost to TASFAA was \$500 per NASFAA Credential topic, for a total of \$1,500 for the 2018-19 year. No additional costs are associated with these trainings- materials were provided electronically to all trainers and participants through a shared Google Drive.



Regional Training Committee

Committee Members:

Co-Chair: Heather Fountain, Texas A&M University

Co-Chair: Christy Miller, Texas Tech University

TASFAA Regional Training conducted the FY 19 regional trainings. We invited presenters from the Texas Higher Education Coordinating Board and invited the Department of Education to present Federal Updates. This year we also invited Trellis to give an “Inside the Beltway” update during lunch. We were able to increase the number of sites we provided regional training to which went very well.

This year’s topics included state and federal updates and Satisfactory Academic Progress with NASFAA Credentialing. We also increased the number of committee members for the Regional Training committee, which allowed us to assign roles to each member and allow others to gain valuable presentation experience. Training was held at five sites that included: Houston, Dallas/Ft. Worth, Austin, El Paso, and Lubbock.

Number of attendees per site is as follows:

		Total	NASFAA
	Registration	Attendees	Credential
Lubbock	61	58	49
El Paso	44	41	22
Houston	90	81	69
Austin	93	89	76
DFW	169	127	125



Regional Training Committee

We had a budget of \$12,200, which included funding from TASFAA, corporate sponsors, and Trellis Company. We were able to provide drinks and candy throughout the day and a catered lunch for each site. With food and travel costs for the two committee chairs and other committee members, we were still able to stay under budget and only spent \$7,225.07 for FY 19 Regional Trainings.

Thank you to each of the contacts at the host campuses. They were a huge help in making Regional Trainings a success this year. Thank you also to everyone that volunteered to help at the sites on the day of the events and all of our committee members. We couldn't have done it without you! We have enjoyed co chairing Regional Training for the past two years. We are excited to see what next year's co-chairs are going to bring in FY 20!

Site Selection Committee

Committee Members:

Chair: David Orsag, University of Mary Hardin Baylor

Vice Chair: Marcus Wilson, Texas Tech Health Sciences

The Site Selection Committee worked to identify locations around the state that best meet our needs for the 2020 Annual TASFAA Conference. We evaluated venues on the southern gulf coast as well as the San Antonio area. We narrowed the selection to the Wyndham, San Antonio Riverwalk and the Omni Bayfront Tower in Corpus Christi. The TASFAA Board selected the Wyndham, San Antonio Riverwalk and look forward to returning to this venue and hope that the membership is happy to revisit San Antonio!

We also secured a contract to return to Great Wolf Lodge, in Grapevine, this spring for the New Aid Officer's Workshop. Great Wolf Lodge was well received by both participants and the Training Committee in 2019 and we are excited to return to the site this year.

TASFAA Mentor/Protégé Task Force Committee Annual Report

Committee Members:

Chair: Shannon Crossland, Texas Tech University

Vice Chair: Rachael A. Fournier, University of Texas - Arlington

Activities 2018-19:

- Reached out to all mentors and protégés from sign-up list received and confirmed interest and expectations:
 - Matched mentors and protégés based on participation.
 - Created reference sheet listing expertise of mentors participating
- Assigned TASFAA Board Member Carolyn Jones as a mentor based on a connection at Regional Training.
- Researched “Mentor Software” options to assist with efforts while assessing outcomes
- Outlined approach to build an infrastructure moving forward.
 - Approach will depend on dedicated board support in the form of board participation. Without expected board participation and engagement efforts with protégés, the approach will take a more mid-level approach.
 - Decision on software or application to facilitate efforts will determine infrastructure.

Thank you for the opportunity to serve TASFAA.

Respectfully submitted,
Shannon Crossland, Chair



Early Awareness Committee

Submitted by: Carolyn Jones

Committee Members:

Chair: Carolyn Jones - Collin College

Mary Escobar - Angelo State

Debra Urias - Brazos

Brooke Woolsley - Brazosport College

Michelle Enriguez - Citizens Bank

Committee Activity (events, statisitcs, meetings, etc)

- Austin Community College 11/14/2019
- Stephen F. Austin 12/04/2019 & 12/05/2019, 18 people total for both days
- Texas A&M 11/08/2019, 27 people
- Alamo 11/15/2019, 57 people

Still waiting on dates for the other schools.

Lamar had to cancel because of flooding.



Training Committee

Submitted by: Danchees (D.) Ingram, Chair

Report Date: 10/1/19

Committee Members:

Chair: D. Ingram, UT Southwestern

Vice-Chair: Mariah Fournier, DCCCD

Members:

David Orsag, University of Mary Hardin-Baylor

Zachary Krueger, University of Mary Hardin-Baylor

Julie Wittmis, Texas Woman's University

Lindsay Partridge, UT Southwestern

Dawn Coleman-Glen, Texas A&M University

Committee Activity (events, statistics, meetings, etc.):

NAOW Workshop

New Aid officer Workshop this year began on Tuesday May 21st and concluded on Thursday, May 23rd. The middle of the week workshop did not hinder attendance. We welcomed 81 attendees across 4-year public, private and 2-year community colleges. Our theme was the Jungle Book, to fit with the wilderness décor of Great Wolf Lodge in Grapevine Texas.



Training Committee

Submitted by: Danchees (D.) Ingram, Chair

The workshop received great reviews with numerous accolades. This was definitely due to the pooled participation of the remaining committee members and guest presenters: Dennise Mendez, Texas Woman's University, Courtney Childress, Texas A&M University, Consuela Perez, Southern Methodist University and James Hubeners, Dallas County Community College District in addition to our wonderful colleagues at DoE, Kevin Campbell and THECB, Sophia Rodriguez. Inviting more guest presenter worked out well. It is definitely something we will continue in the coming years.

Great Wolf Lodge was well received and some took advantage of the waterpark after hours. The Wednesday evening dinner was well attended and Dawn did a wonderful job with the activity. The committee experienced some technical issues. The staff at Great Wolf Lodge provided prompt attention to those issues. Great Wolf Lodge accommodated changes and the committee would support using them again. In the initial review of participants' surveys, the responses have been extremely favorable. They enjoyed the presenters' style, interactive games, and the open discussions.

Great Wolf Lodge and all committee members have been paid. Revenues generated from registration fess exceed 28,000 this year. Expenses for the training committees and facility total a little over 25,000. Contacts are in the works for another year.



Training Committee

Submitted by: Danchees (D.) Ingram, Chair

ABC Workshop:

The ABC workshop at the Historical Fort Worth Hilton in downtown Fort Worth Texas. The conference will begin on Tuesday, October 8th with a full day of training. It is set to conclude at noon on the Wednesday October 9th to allow time to attend the opening ceremonies for the annual conference. We are excited to host 60 financial aid professionals. The agenda include trainings from application processing through professional communication skills. We have invited back the Department of Education along with the Texas Higher Education Coordinating Board to discuss federal and state programs and compliance. The training committee has adopted the annual conference theme of denim dollars and decreasing debt. We will also continue the social media hashtag marketing tool #TASFAAABC2019.

The committee is set to meet at the Hilton on October 7th to discuss last minute arrangements. The committee chairs will also meet with the catering manager and staff to take one last overview of the set up and details of the event. Based on the projected attendees, revenues will be \$9,000 based on 60 registrants. Expenses for the ABC Workshop exceed the revenue. Food, beverage, and AV cost will amount to 12,000 in expense. The committee travel, room and meal are not included in that estimate. We asked the board to consider increasing the registration fee to \$200 to meet these costs.



Training Committee

Submitted by: Danchees (D.) Ingram, Chair

Invited the mentor/protégé committee chair to have a meet and greet at ABC attendees to help create connections for the mentor program.

Pending Activity:

- Review the structure of the two program ABC and NAOW
- Working with the Mentor/Protégé Committee to arrange a meet and greet at ABC 2019 to help foster these key, professional relationships
- Reviewing cost options for professional, uniform shirts to create a marketing brand for the TASFAA Training Committee
- Reviewing options for TASFAA NAOW/ABC banner

Board Action Requested: We would like the board to consider increasing the ABC cost to \$200 to help cover the increased cost. The cost of the ABC program is higher due to the location. Since it is alongside of the annual conference. This leads to higher food cost and room rates then the NAOW.

Comments: The training committing would like to thank that the board for their continued support and encouragement.

Enclosures:

ABC Budget
ABC Agenda

Training Committee

Submitted by: Danchees (D.) Ingram, Chair

Rate	Cost	Description
150	\$ 9,000.00	Registration Revenue
24	1560	Tues Breakfast
12	780	Tues AM Break
44	2860	Tues Lunch
13	845	Tues PM Break
33	4550	Tues Breakfast
12	780	Tues AM Break
	\$ 11,375.00	Food Expense
	\$ 1,000.00	AV Expense
169	2366	Committee Room
35	490	Committee Food
0.59	590	Committee Travel
	300	décor & misc
	\$ 3,746.00	Committee Expenses
	\$ 16,121.00	Total Expenses
	\$ (7,121.00)	Balance



Web Services Committee

Submitted by: Kevin Armalay

2018-2019 was an exciting year for Web Services. The highlight of the year has been the selection and launch of a new web and membership management platform. In January, 2019 we received an email from our provider since 2001, ATAC Corporation, indicating that they were closing their operations at the end of November.

The year began with a review of several providers, and a recommendation to the Board that we engage MemberClicks as our new platform. Based on the recommendation which evaluated cost, features, flexibility, and support, MemberClicks was chosen as our new provider of both a web presence and a membership and billing back-end.

In the later part of summer 2019, and into Fall 2019, we participated in many preparatory meetings and trainings, migrated the database (with the assistance of Donnie Purvis, Chair of Membership Committee) and followed with the migration of the site.

The site launched shortly after the conclusion of the 2019 annual conference. Web Services then worked with Memberclicks, the Membership Committee, and TASFAA's bookkeeper, Tia Clary, to execute the membership renewal process for institutions.



Operating Reserves Task Force Report

By: Christopher D. Murr

The charge to the task force from the TASFAA president was to determine an adequate operating reserve (i.e., cash on hand level) for TASFAA. The work of the task force over the past year included, but was not limited to, the following:

- Based on research, it appears appropriate to keep an association's available operating reserve between 3-6 months to 1.5 times its annual budget (sources included, but are not limited to, the Corporate Finance Institute, Houston Chronicle, and Westchester County Business Journal).
- As confirmed with Tia Clary (TASFAA's bookkeeper), the cash balance in TASFAA's checking account (October of 2018) was \$120,000 (i.e., approximately one-half of TASFAA's annual operating expenses).
- Recommended that the operating reserve level be kept at a minimum of six months of the Association's annual operating expenses.
- Recommended the addition of related text to the TASFAA policies and procedures.
- After approval of the recommendations by the Board, the relevant changes were made to the TASFAA policies and procedures.



Aspiring Director Task Force Report

Chair: Carolyn J Jones

Members: Lyn Kinyon, Zelma DeLeon, Christina Pikla

The Aspiring Director Task Force was created to look at providing an additional opportunity for training for those who are considering or on the trajectory of becoming a director. The thought process was to offer something similar to what NASFAA offers for those looking to advance in the financial aid industry. Many individuals who would like to advance in the industry may not have the opportunity to attend NASFAA. Carolyn Jones was asked to chair this task force.

After discussions on whether the training should be connected to the fall conference, or separate. Lyn Kinyon suggested to incorporate a track into the fall conference of 2019.

With that suggestion the task force worked on topics which they believed would be the most valuable to those who would select to attend this track. The topics ranged from management of people, of financial aid funds, marketing the financial aid office, and collaboration with other campus entities.

The task group sought out current directors varying in the longevity of their careers as well as from public, private and two-year colleges. This was helpful as there were perspectives from recently hired directors to those who had been a director for some time and from different college sectors.

Aspiring Director Task Force Report

The information was presented via a panel with prompted questions for each person to answer. The participants were also able to ask specific questions to the panel.

Conference participants could attend the entire track which consisted of four sessions. Those who choose the track attended all the sessions. Some conference participants attended sessions as they were able.

The track was well attended and conference evaluations revealed participants enjoyed the track and found it valuable.