



TEXAS ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS



# **TEAM UP for SUCCESS**

## **2009 Annual Report**



## President's Message

by Rick Renshaw

As fiscal year 2009 draws to a close, I am pleased to report that our association is making great strides toward adapting to the new environment in which our profession now exists. With the changes to our constitution that were approved by the membership in June, TASFAA is better positioned to correct the inequity of being labeled as a "lender" in some of the Code of Conduct agreements that were signed by some of our member institutions in the wake of the lender-school relationship scandal back

in 2006. As a result of that unfair and inaccurate labeling, many of our school representatives have been prohibited from participating fully in associational activities and leadership roles.

Within this new environment, flexibility and change are key words to remember. Congress is debating fundamental changes to the Part B loan programs, the Perkins Loan program, and the way that students apply for federal aid. The recession and dwindling resources have presented challenges to TASFAA in providing training opportunities for our membership. However, the TASFAA board stepped up to the plate this year and approved a budget that was lean but focused our energy into providing quality training, advocacy for our students with the 81st Texas Legislature, and an exceptional fall conference experience. Two fundamental changes were approved in our training programs. First, the Board approved a recommendation from the Early Awareness Committee to replace our traditional home grown curriculum for the High School Counselor Workshops with the National Training for Counselors and Mentors (NT4CM). Second, after NASFAA decided to reformat its Fall Training Series from a de-centralized model to a webinar training model, the Board directed the Regional Training Committee to revise its charge from facilitating the NASFAA de-centralized training sessions to creating a curriculum and conducting Spring training sessions around the state.

For over 40 years TASFAA has served Texas students and institutions, providing a leadership role in training, education and collaboration, developing future financial aid leaders and promoting access to higher education for all students. And we will continue. In 2009-10, under the able leadership of President Carolyn Jones and her board, the Association will face many challenges as the winds of change continue to blow. I am sure that when all is said and done, Carolyn will be able to write in her message in 2010 that the state of our Association is well.

Sincerely,

**Rick Renshaw**  
TASFAA President, 2008-09

## Officers 2008-2009

### President

Richard Renshaw

### Vice President

David Ximenez

### President Elect

Carolyn J. Jones

### Past President

Lisa Blazer

### Treasurer

Tia Clary

### Secretary

Amy Hardesty

### Board Members

Tomas Campos

Mari Chapa

Enrique Garcia

Raul Lerma

Kay Mooney

Rick Moreno

Jimmy Parker

Richard Silva

Ed Turney

Lyn Wheeler



## 2008-2009 TASFAA Board of Directors

**Richard C. Renshaw**, President, Dallas County Community College District

**Carolyn J. Jones**, President-Elect, Collin County Community College

**Lisa G. Blazer**, PhD, Past President, University of Texas – San Antonio

**David Ximenez**, Vice President, Tarrant County Community College District

**Amy D. Hardesty**, Secretary/Historian, Lubbock Christian University

**Tia Clary**, Treasurer, Lubbock Christian University

**Enrique Garcia, Jr.**, Board Member At Large, Del Mar College

**Kay Mooney**, Board Member At Large, Amarillo College

**Ed Turney**, Board Member At Large, University of North Texas

**Rick Moreno**, Board Member At Large, Laredo Community College

**Mari Chapa**, Board Member At Large, University of Texas - Brownsville

**David Ximenez**, Board Member At Large, Tarrant County Community College District

**Raul H. Lerma**, Board Member At Large, University of Texas – El Paso

**Richard Silva**, Board Member At Large, Alamo Community College District

**Lyn Wheeler**, Board Member At Large, Angelo State University

**Tomas Campos**, Board Member At Large, San Antonio College

**Jimmy Parker**, Associate Board Member At Large, Panhandle Plains Student Loan Center







# TASFAA Mission Statement

**Mission:** TASFAA is a professional organization that provides a leadership role in training, education and collaboration, developing future financial aid leaders and promoting access to higher education for all students. We advocate for improvements in aid programs through partnerships with industry leaders and legislative involvement. As an organization, we strive to uphold the excellence and high ethical standards of the financial aid community.

**Vision:** Recognized as the leading authority on financial aid in Texas.

### Core Values:

- **Ethics:** Foster an atmosphere of integrity, honesty, openness, accountability, and trust both corporately and individually
- **Inclusiveness:** Foster a sense of belonging through acceptance of diverse thoughts and philosophies.
- **Collaboration:** Work together toward common goals by openly sharing knowledge and resources while engaging in partnerships with broader communities.
- **Excellence:** Reach our vision by exceeding expectations, using innovative and creative solutions.
- **Leadership:** Build on the foundation of previous leaders, enhance the skills of our current members, and guide the emerging leadership of our organization.





## TASFAA Committee Reports

### Awards Committee

#### Committee Agenda

- Star Financial Aid Advisor Award
- Hall of Fame Award
- Trailblazer Award
- Service Pins distribution in October 08 and 2009
- Updating the Time Capsule Info
- Mailed pins to last year's recipients that did not attend TASFAA 2008
- Quote for new Service Pins and reorder

The Awards Committee has had a busy year. We changed the process of awarding service pins which will ensure accuracy of years of service in TASFAA as well as distribution of the service pins. We are working on a quote to increase our stock on service pins. Those that will not attend TASFAA 2009 will receive their pin in the mail to the address we have listed on the membership database.

We are working on updating the Time Capsule for the Trailblazer, Hall of Fame and adding the Star Financial Aid Advisor Award winners. The committee wants to honor all of those nominated, so keep checking the Time Capsule for updates.

The Hall of Fame, Trailblazer and Star Advisor nominees for 08/09 will be announced at the TASFAA Conference October 2009.

### Communications Network (TRAIN Network)

During 2008-09, the Communications Network Committee continued to assist in providing information and monitoring activity within the TASFAA website, [www.tasfaa.org](http://www.tasfaa.org). The committee:

- Monitors employment listing and listserv activity
- Edits and tests interactive online forms
- Provides updates and other information to website administrators
- Assists TASFAA Board and committee website requests
- Manages and responds to email/correspondence addressed to TASFAA general account
- Reviews website for revisions and proper functionality

Future committee plans include the updating of and training upon the online TRAINetwork, and creating an online archive of past data and other useful resources for the TASFAA community.

### Fall Conference 2009 Committee

This year's conference theme is "TEAM UP for SUCCESS". The conference committee has been working hard to plan an interactive and informative professional development conference. The conference will be held at

the Arlington Convention Center October 7-9, 2009 and there will be numerous workshop activities and attractions to take advantage of in your free time.

We are all aware of the new regulations which will and have already impacted the financial aid industry; therefore the conference committee has lined up a wide selection of workshop sessions to cover. Topics on the agenda consist of the new Chapter 33- Post 9/11 benefits, available services and assistance programs for returning Veterans and their families, Direct Lending, Professional Judgment, Verification Processing, Cohort Default Rates, TEACH Grant, Tax Documentation, Professional Development, Cash Management, Simplified FAFSA application process, Team Building, Financial Literacy, Income Based Repayment and many more to choose from.

Presenters and guests for this year's conference will be colleagues from area colleges and universities, Federal Student Aid Office, Texas Higher Education Coordinating Board, SWASFAA and a representative from U.S. Senator, John Cornyn's office in D.C. The opening luncheon will begin with remarks from our current President Rick Renshaw, followed by guest speaker Drew Pearson and the Drum Café; which will provide our attendants with words to encourage us to work effectively and collaboratively as a team, despite the trying times in the economy and budget cuts which have impacted our campuses and organizations.

Arlington is the home of the Texas Rangers Stadium, Six Flags over Texas, Hurricane Harbor, and the arrival of the new Dallas Cowboys Stadium! We have planned an exciting evening event, TASFAA's very own "Night at the Ballpark", which will be held in the Arlington Convention Center. Bring your favorite team jersey and team spirit, brush up on your singing for a swing at karaoke, and come join us for a night of fun as we conclude a week of work, collaboration, and networking during the conference.

### Constitution/Bylaws Committee

The Constitution and By-laws committee had several charges from the TASFAA Board this year.

There have been several changes to the Policy and Procedure manual and the Constitution & By-Laws. These two documents must be reviewed to insure that all changes have been incorporated and that there is no conflicting information between the two. Anticipated date of completion to have the revisions posted to the TASFAA website is prior to the fall conference.

The committee was also instrumental in conducting an associational vote to change the Constitution and By-laws. Listed below is the information provided to the membership for the potential changes:





### **Recommendation #1: Constitution Article IV, Section 3, Memberships**

**Proposed:** Associate membership shall be open to public and private agencies and organizations concerned with or engaged in the support and/or administration of student financial aid to include representatives of government agencies (state and federal), foundations, banks and other financial institutions, guarantee agencies, organizations involved in providing services and products to postsecondary institutions, and private and community organizations interested in student financial aid matters.

Associate member institutions play an active role in TASFAA activities, may serve as members of committees, and shall have all rights and privileges of membership except the right to vote, serve as a committee chair, or hold office on the Board.

**Summary:** This change will remove the associate member position from the board.

### **Recommendation #2: By-Laws, 1. Dues and Memberships, Section 1**

**Proposed:** There shall be no initiation fee charged for admission to the Association. Thereafter, annual membership dues and due structure for voting membership, associate membership and individual membership will be established annually by a majority vote of the Board.

**Summary:** This change will allow the board to change both the amount of dues and the dues structure with a board vote instead of the constitutional amendment process.

Both changes were approved by the membership. These changes will be reflected in the on-line version of the C&BL.

### **Early Awareness Committee (Middle School & High School)**

This year was an interesting year, with so many coming and going. The committee had most of their meetings as conference calls. The H.S. Counselor workbook was updated for the year, and it was decided by the recommendation of the Committee and approval of the TASFAA Board that we would go from paper workbooks to CD's. We contacted the schools to see who would participate the year in holding the Workshops for us and had a smaller list than the year before, but still had approximately 18 schools host the event for us. We mailed out a total of approximately 1,040 CD's, with most of those being given out at the Workshops. We had good evaluations, and mostly positive on the new CD's, some didn't like them as much as the workbook, I think that is just a matter of becoming familiar with the CD's. The good part is that they can print it off if they want. We also recommended to the TASFAA Board that this upcoming year we participate in the NASFAA program called NT4CM for our upcoming training. They furnish all materials, and each state adds their part to it, they provide free registration and have a website that is very helpful for information, training events, etc. The training for this started in August. Since we don't start our new Committee Chairs, I asked Raul Lerma



## TASFAA - 2009 Annual Report

and Linda Gonzales to take over so they would not have to come in during the middle of it. They are going to be the Committee Chairs this upcoming year. I do not feel that someone starting in the middle is good, this way they will know exactly what is going on, and start scheduling the training for this next year.

### Finance Committee

The Finance Committee reviewed best practices based on information gathered at the NASFAA Leadership Conference.

Based on the review of best practices the finance committee made the following changes to the way the association conducts financial business.

Each month after the bank statement is received by Tia she will scan it and forward it to the President for review (currently Rick Renshaw). On November 1 of each year she will change who that information goes to for review as the new president takes office.

A spreadsheet was created of items that have to be renewed or paid on a somewhat regular basis and this spreadsheet will be added to the Policy & Procedure manual as an "Appendix C – Finance Calendar". This will help insure that important renewals/changes are not skipped or forgotten. This is a work in progress and will be adjusted as the need arises.

### Membership Committee

The Membership Committee experienced a busy year! During the fall, several notices were sent out via the TASFAA listserv reminding institutions to renew their membership. When membership applications were completed, personal emails were sent out on behalf of TASFAA thanking them for renewing. In February, personalized emails were sent to all non-renewals outlining the benefits of TASFAA membership and detailed information on how to renew was provided. In March after obtaining a list of institutions that had not renewed from the previous year, the committee reviewed the report and decided to concentrate our efforts on institutions still participating in the business. At the TGSLC conference our committee met and divided up the list of potential renewals. Non-renewals attending the TGSLC conference received a follow-up contact. Others were contacted by phone and once again reminded that their membership had expired. This targeted campaign has garnered positive results for our organization as several institutions renewed. While our membership numbers are down from last year, that was to be expected due to the large number of institutions that have exited the industry.

### Mentoring, Leadership & Diversity Issues Committee

Carolyn Jones did the Mentor presentation at the NAOW in May. From that presentation, we received 15

new protégé requests. We put a call out via the ListServe to find mentors with experience in POISE, BANNER and PEOPLESOFT. We had a tremendous response, and within one day were able to match all 15 protégés with mentors. We currently have 6 unmatched mentors.

We have not received much feedback from either protégés or mentors as to how the program is working for them, but the committee has been assigned the task to check on a portion of the matched list to insure that all are participating and will report hopefully by the time the actual Board meeting takes place. Updates will follow at that time.

### Newsletter/Public Relations Committee

In March of 2002 the TASFAA Newsletter was first published in an online format which allowed the membership to have greater and faster access to news related to the association. As of February, 2009 the TASFAA Times is now offered online in a portable data format (pdf) to even better serve the needs of the membership. In this format it can be saved for future reference or shared with others to whom it might be of interest. We found that we still have a lot of members who like to print and read documents when they are away from their offices too. The stated mission of the Newsletter Committee has always been to provide information that is "For and About the Members of TASFAA". As diverse as the membership has become and as the complexity of financial aid has increased it has proven a difficult task to meet the needs of all. Since January of 2008 there have been seven editions of the TASFAA Times and seventy-two articles of interest included. These articles have included news from the President of TASFAA, The National Association of Student Financial Aid Administrators, Guarantors, Lenders, individual members, reports from TASFAA committees in each edition, and articles about individual members.

### Nominations & Elections Committee

As Vice Chair for the Nominations and Elections Committee, I assumed the role as Chair on July 17th. Below is a listing of activities that our committee completed during the nominations and elections process.

#### Nominations process

- Worked with Alan Ahmad to activate nominations form on the website
- Distributed email to TASFAA listserv members notifying them of availability of nomination form, listing of open offices and instructions on how to complete nominations
- Sent out 2nd (of three) reminder emails to encourage nomination
- Contacted Nominations and Elections committee members for assistance in contacting members for participation in the nominations process
- Contacted six TASFAA members to personally request nominations





- Contacted the five departing board members to solicit interest in being nominated for an additional two years
- Received a total of eight nominations for the Board Members at Large and one nomination for President Elect.
- Contacted committee members to solicit additional nominations
- Sent out final reminder for nomination to listserv
- Validated the list of nominations to determine that they were eligible to serve the TASFAA board
- After the close of nominations, presented the list of eligible nominations to the board for approval as the 2009 candidate slate

### Elections process

- Communicated candidate slate to membership and announced the elections dates
- Sent out three reminders to the membership about the elections, including a reminder to financial aid administrators to verify who is assigned as the voting member for their institution
- Elections are scheduled to begin on 9/18/09 and end on 10/2/09
- The results of the election will be presented to the board at the board meeting, on the first day of the annual conference (10/6/09)

### President's Advisory Council

The President's Advisory Council for Planning and Evaluation is responsible for evaluating the TASFAA Strategic Initiative and Goals for the Association with regard to meeting the objectives of the Association.

Upon the request of the TASFAA President, the group focus for the 2008-09 year was on Initiatives # 2 TASFAA Infrastructure #3 TASFAA Fiscal Stability. It was felt that changes in the student loan industry and the political climate in the state of Texas required that TASFAA evaluate its existing structure. The work done by PAC resulted in two recommendations for changes to the TASFAA Constitution and By-laws.

1. A recommendation to change the TASFAA bylaws to allow for future changes in due structure without requiring a vote of the membership to change the bylaws.
2. A recommendation to change Article IV Section 3 of the TASFAA Constitution to continue to allow Associate members to serve as members of TASFAA committees but removing the Associate member from the Board. The recommendation also included a more expanded explanation of what organizations could be considered for Associate membership.

PAC also made a recommendation that the TASFAA Board take an active role in being aware of which lenders are involved in discriminatory lending

practices towards any of its members (traditional and proprietary) and officially notify the lender of the organizations concerns. PAC recommended that an open letter to all TASFAA members should be sent annually by the TASFAA President in support of the NASFAA Resolution regarding discriminatory lending practices

### Scholarship Committee

As the training season approached the scholarship committee invited everyone to apply for the Mack C. Adams Professional Development Scholarship. The scholarship is available for the New Aid Officers Workshop (NAOW) in May and the TASFAA Fall Conference (TFC) in October. This scholarship was designed to assist financial aid professionals with the cost of attending these two training opportunities.

The scholarship not only allows you travel to training, it allows you to become a part of the wonderful financial aid community in the great state of Texas. Not only do you grow as a professional and as an individual, but you also have the opportunity to be a teacher and show others perspectives and ideas they may not have had without your presence at these trainings.

Application for the NAOW scholarship were made available February 27th. The deadline to submit the application was April 3rd and recipients were notified April 27th of award.

Application for the TFC scholarship were made available July 1st. The deadline to submit the application was August 7th and recipients were notified September 4th.

There were 31 applicants for the NAOW and we awarded 9 of those. For the fall conference there were 17 applicants and 6 were awarded.

### Site Selection Committee

The primary goal of the Site Selection Committee is to anticipate the needs of the TASFAA membership under the guidance of the TASFAA Board of Directors. Understanding these needs will allow the Committee to research and develop the tools to solicit, review and recommend potential future training sites for the annual Fall Conference, New Aid Officers Workshop and other opportunities as deemed necessary by the TASFAA Board of Directors.

The objectives of the committee involve but are not limited to:

- recommending suitable fall conference sites,
- obtain reasonable rates and accommodations for all attendees,
- easy access from all parts of the state, and
- assisting other committees in accomplishing their goals.





### Regional Training Committee

As changes come down the pipe from NASFAA regarding training issues, it appears there are many concerns.

- This model cuts out the state and regional associations by making them optional middle men in the distribution plan.
- Offering four 1.5 hours sessions over the course of the fall and winter is not practical for travel time at 4 times the normal.
- Offering one all day showing of the four sessions is not practical because the full package will not be available until after the holidays and too late for effective timing. Most schools will not wait that long but go ahead and pay for the sessions themselves.
- As long as NASFAA allows its member schools to access the presentations themselves on an individual basis, there is no way that the associations can afford to offer the training in any format. Schools will almost universally choose to conduct at home and avoid the travel expenses.
- The cost of training local facilitator/trainers would be a waste of association money because there would be no need for sessions sponsored by the association.

It is this committee's recommendation that we continue to offer training as a deliverable, even without the NASFAA Decentralized training. We can make additions so that it incorporates more regulatory and professional development. We can continue to offer NAOW and ABC Workshops as well as our conference. Thus, offering something that everyone will benefit from and still provide service to our community justifying our membership fees.

### Training Committee

The training committee has had a great and challenging year. We had a very successful New Aid Officers Workshop (NAOW) at St. Mary's University in May. The Training Committee would like to extend a hearty thank you to all of our speakers for NAOW who graciously volunteered their time to come to St. Mary's and share their wealth of knowledge with those who are new to our industry.

I would like to personally thank my committee members who stepped up to the challenges that were placed before us at NAOW. Thank you in no particular order to Vincent, Shana, Tricia, Elena, Erin, Yvonne, Devon, Denise and Consuela!!!! TASFAA should know how great of volunteers you all are and how committed you are to your professions and the students we serve.

Lastly, before I get into the meat of my report, thank the TASFAA Board and its assistance and backing for making NAOW a great success. Everyone reported that they enjoyed the involvement of the Board throughout the week. You all were a great encouragement to the new campers.

The Training Committee has been working hard since February 4th planning for NAOW and the upcoming ABC Workshop. We had a total of 83 campers registered and paid for NAOW. We had anticipated as a committee to have approximately 90 registered campers. We knew going in that the current economic climate and the new paradigm our industry is operating in would be a factor in our overall registration. We managed our expectations and kept down our costs as much as possible to hedge against this. The Training Committee utilized speakers local to the San Antonio area and included more activities on-site at St. Mary's University as other cost saving measures. Even by cutting costs, TASFAA and the Training Committee was still able to produce a very professional and successful training workshop.

Our total revenue for NAOW was \$29,825. The total expenses were \$29,446. This gives us a net profit of approximately \$379. I say approximately because part of the invoice from St. Mary's University includes TASFAA Board expenses that we have not been able to get itemized yet from the director of St. Mary's Conference Services. The Training Committee will come in under budget this year as we have worked hard to cut costs and expenses as much as possible.

To look toward the future, we are gearing up and getting our annual ABC Workshop finalized. We are looking forward to a great time in Arlington. I would like to thank Dana Mingo and the TASFAA Conference Committee for their help and support. She has been great to work with and wonderful in communicating our needs to the Arlington Convention Center staff.

As I pass on the Chair responsibilities to Devon Wiggins, I would like to thank the TASFAA Board and our president Rick Renshaw for your support and candid advice. I am looking forward to working with Devon next year in planning NAOW and ABC and assisting her any way I can.

The Training Committee will have a final committee meeting at the TASFAA Conference to go over what we have done this year and review all evaluations from NAOW and ABC to see what areas we can improve upon for next year. I know Devon is looking forward to and will have a successful 2010 as it relates to the Training Committee and its goals and agenda.





## 2008-2009 TASFAA Committee Members

### Awards Committee

Jackie Stevens, Chair - Parker College of Chiropractic  
Carolyn Mallory, Vice-chair - University of  
Houston - Victoria  
June Perry - TG - The Guarantor of Choice  
Scott Moore - Univ of St. Thomas

### Communications Network (TRAIN Network)

Alan D. Ahmad, Chair - Texas A&M University

### Fall Conference Committee

Dana N Mingo, Chair - Eastfield College  
Anne E. Walker, Vice-Chair - Rice University  
Caitie Blount - TDECU  
Cathleen Wright-Texas Lutheran University  
Vincent D Carales - TG - The Guarantor of Choice  
Tricia Johnson - Wells Fargo Educational Finance Service  
Tina M Chargois - University of Houston  
Donna King - Grayson County College  
Jessica Solcich - TG - The Guarantor of Choice  
Jolynn Sprole - Tarrant County College  
Keith A. Dickson - TG - The Guarantor of Choice  
Maria Araiza - Weatherford College  
Valerie D Gonzalez - EdFund  
Rachel Anderson - Texas A & M University  
Kimberly Mosley - Eastfield College, DCCCD  
Walley Boudet - Discover Student Loans  
Marcos J Mendez - Texas A&M University  
Michael Williams - Richland College, DCCCD  
Cherry Brown - Richland College, DCCCD  
Sheree' Porter - Richland College, DCCCD  
Rickey Eddie - UNT Dallas  
Cathryn Smith - El Centro College, DCCCD  
DeCha Reid - Cedar Valley College, DCCCD  
Joseph Sanchez - UNT Health Science Center  
Belinda Luna - Eastfield College, DCCCD  
Brenda Hardaway - Eastfield College, DCCCD  
Erika Williams - Tarrant County College  
Francisco Gabriel - Eastfield College, DCCCD  
Donna G Smith - TG - The Guarantor of Choice  
Irene Smith - COSTEP  
Belen Valdez - Texas A&M University  
John W Wells - El Centro Community College  
Denise Welch - Panola College

### Constitution/Bylaws Committee

Kathy A. Bassham, Chair - Weatherford College  
Shannon L. Crossland, Vice-Chair - Texas Tech  
University

8 Lisa G. Blazer, PhD. - University of Texas - San Antonio  
Devon Wiggins - Tyler Junior College

### Early Awareness Committee (Middle School & High School)

Lea A. Davidson, Chair - Texas Tech University  
Linda A. Gonzalez-Hensgen, Vice-Chair - El Paso  
Community College  
Raul H. Lerma, Vice-Chair - University of Texas - El Paso  
Marcie Beasley - Texas Tech University  
Linda A. Gonzalez-Hensgen - El Paso Community College  
Don W. Hilton - Panhandle Plains Student Loan Center  
Richard Sapp - Texas Guaranteed  
Lynda Sheets - ACS  
Mary T. Teel - Texas A&M University  
Cathleen F. Wright - Texas Lutheran University

### Finance Committee

Carolyn J. Jones, Chair - Collin County Community College  
Lisa G. Blazer, PhD. - University of Texas - San Antonio  
Tia Clary - Lubbock Christian University  
Richard C. Renshaw - Dallas County Community  
College District  
Lyn Wheeler - Angelo State University

### Membership Committee

Melissa J. Elliott, Chair - Vernon College  
Lynn Barnes, Vice-Chair - Texas A&M University  
Dolly Lasater - TAMU Commerce  
Marcos Mendez - TAMU  
George Durstine - PPSLC  
Amanda Jurovic - Rice

### Mentoring, Leadership & Diversity Issues Committee

Terri Thompson, Chair - Weatherford College  
Michael Williams, Vice Chair - Richland College,  
Mandy Rangel, Rice University  
Michelle Fleek, TG

### Newsletter/Public Relations Committee

Harold Whitis, Chair - Texas A&M Health Science Center  
Melet Leafgreen, Vice-Chair - Texas Christian University  
Christopher Murr, PhD - Texas State University  
Alan D. Ahmad - Texas A&M University  
Mariko Gomez - Texas State University  
Chris Elam - Campus Door  
Shannon Crossland - Texas Tech University  
Tanya Vittitow - Panhandle Plains  
Debbie Whitis - Texas Higher Education Coordinating Board  
Zack Workman - Herring National Bank





## TASFAA - 2009 Annual Report

### Nominations & Elections Committee

Laura Elizondo, Chair - Texas A&M International University  
 Caren A. Stewart, Vice-Chair - ATI Enterprises, Inc.  
 Michelle Coburn - Panhandle Plains Student Loan Center  
 Cecelia K. Jones - Texas College

### President's Advisory Council

Linda Gonzalez-Hensgen - El Paso Community College  
 Jimmy Parker - Panhandle Plains  
 Karen Krause - UT Arlington  
 Lyn Wheeler - Angelo State  
 Marcus Wilson - Texas Tech Health Science Center  
 Kathy Bassham - Weatherford College

### Scholarship Committee

Veronica J. Cano, Chair - University of Texas  
 Christina L. Quintanilla, Vice-Chair - Texas  
 Lutheran University  
 Rayanne Hukill - Weatherford College  
 Caroline Hernandez - Texas Guarantee  
 Marcia Olvera - UT El Paso  
 Laura Elizondo - Texas A&M  
 Casey Martin - South Plains College  
 Delisa Falks - Texas A&M  
 Laurie Coulter - Austin College  
 Karen Lazarz - Southwest Assemblies of God

### Site Selection Committee

John W. Wells, Chair - El Centro Community College  
 JimAnn Batenhorst, Vice-Chair - South Plains College

### Regional Training Committee

Marci Beasley, Chair - Texas Tech University  
 Wesley Vanderburg, Vice-Chair - ATI Enterprises  
 Paul Blake - Texas Tech University  
 Lea Davidson - Texas Tech University  
 Tanya Vittitow - Panhandle Plains  
 Lisa Blazer, PhD - UTSA  
 Cristen Alicea - University of Incarnate Word  
 Clarissa Peereboom - Regional Educating Lending  
 Diana Martinez - UTSA

### Training Committee

Wesley M. Vanderburg, Chair - ATI Enterprises, Inc.  
 Devon Wiggins, Vice-Chair - Tyler Junior College  
 Vincent D. Carales - Texas Guarantee  
 Tricia Johnson - Wells Fargo Education Financial Services  
 Consuela P. Mitchell - Southern Methodist University  
 Elena Olivier - San Jacinto College  
 Erin M. Porter - Texas A&M University  
 Yvonne H. Reeves-Harwood - Texas Tech University  
 Shana Thompson - Texas Wesleyan University  
 Denise Welch - Panola College







## 2008-2009 TASFAA Training Events

### ABC Workshop - October 2008

#### Regional Training - 2009

- 234 total attendees
- 7 sites
  - San Antonio - University of Incarnate Word
  - Lubbock - Lubbock Christian University
  - Arlington - Tarrant County College
  - Harlingen - Texas State Technical College
  - Corpus Christi - Del Mar College
  - El Paso - El Paso Community College
  - Houston - University of Houston

#### New Aid Officer's Workshop - May 2009

- 83 Attendees

#### Early Awareness Events

- 1840 Total Attendees
- UT Pan American - Student Union Theatre - 250 attendees
- Del Mar College - William F. White - 120 attendees
- Wharton County Jr. College - Rosenberg Civic Center - 75 attendees
- Lee College - Bayer Conference Center - 40 attendees
- Pasadena ISD - Pasadena Memorial High School - 40 attendees
- Lamar State College - Carl Parker Center - 50 attendees
- Montgomery College - University Center Lecture Hall - 75 attendees
- LeTourneau University - Memorial Student Center - 55 attendees
- Paris Junior College - Student Center Ballroom - 40 attendees
- Midwestern State University - Region IX ESC - 60 attendees
- Austin College - Wright Campus - 40 attendees
- Northwood University - Lambert Commons - 50 attendees
- UT Dallas - Student Union Building - 150 attendees
- Texas Christian University - DJ Kelly Alumni Student Center - 75 attendees
- Texas State Technical College - Waco Women's Resource Center - 125 attendees
- TEA Region XIII - Region XIII ESC - 35 attendees
- McMurry University - Furr Welcome Center - 35 attendees
- Angelo State University - University Center - 50 attendees
- Amarillo College - Business & Industry Center Auditorium - 125 attendees
- Texas Tech University - Lubbock Christian Baker Conference Center - 100 attendees
- Howard College - Fireplace Room - 50 attendees
- El Paso Community College - EPCC Admin. Service Center - 80 attendees
- Region XX ESC - Region XX ESC San Antonio - 70 attendees
- UTSA - UTSA University Center Assembly Room - 50 attendees





# 2008-2009 TASFAA Service Awards

## 2008 Service Award Winners

**Star Financial Aid Advisor - Casey Martin**, South Plains College

**Hall of Fame - Ronnie Barnes**, Panhandle Plains Student Loan Center  
**Lynn Wheeler**, Angelo State University

**Trailblazer - Fabian Vasquez**, Texas Tech University

## Years of Service Award Winners

### 35 Years of Service

Terry Bazan	Austin Community College
Juan J Garcia	El Paso Community College
Governor E Jackson	Texas Woman's University
Sonje Johnson	University of Texas - Austin

### 30 Years of Service

Linda C Ballard	Texas Southern University
James F Kubacak	McLennan Community College
Sylvia Perez-Jaquez	Del Mar College
Gloria A Priest	Texas Tech University
Myrna Wyckoff	Dallas Baptist University
Elizabeth M Bandy	Rice University
Elaine L Rivera	University of Texas - Pan American

### 25 Years of Service

Cynthia S Butler	Concorde Career Institute
Tomas Campos	San Antonio College
Gloria Corona	El Paso Community College
Zelma DeLeon	University of North Texas
Kay Egbert	Texas A&M Health Science Center
Ken E Evans	Sanford-Brown Institute - Dallas
Thelma Heil	Laredo Community College
Rebecca S Miles	College of the Mainland
Scott A Moore	Houston Community College
Kimberly R Mosley	Eastfield College
Tammy L Paris	Sam Houston State University
Cammy A Penrod	University of Texas - Brownsville & Texas Southmost College
Richard C Renshaw	Dallas County Community College District
Lisa Tatom	Sam Houston State University
Becky Wilson	Texas Tech University
Marcus O Wilson	Texas Tech University Health Sciences Center

Sarah Winlock	Dallas County Community College District
Linda Craft	KD Studio, Actors Conservatory

### 20 Years of Service

Cynthia Bazan	Austin Community College
Rhonda Beauchamp	Texas State Technical College - Waco
Lori E Boyd	College of the Mainland
Gail Braswell	Austin Community College
Reggie I Brazzle	Texas College
Connie E Chance	Texas State Technical College - West Texas
Cathy Coursey	University of Texas - Dallas
Bertha G Cruz	University of Texas - Brownsville & Texas Southmost College
Mary L Golston	Sanford-Brown Institute - Dallas
Janie Guajardo	Texas A&M University
Paul H Felix	North Lake College
Lawrence F Guttierrez	Austin Community College
Harold Whitis	Texas A&M Health Science Center
James F Lane	Everest Institute - San Antonio
Susan D Lewis	Texas A&M University - Commerce
Julie H Lively	Trinity Valley Community College
Suman S Mashruwala	Vatterott Educational Centers, Inc.
Victor Monette, CSC	St. Edward's University
Annette D. Morgan	Kilgore College
Deborah M Porter-Amey	San Jacinto College
Marilyn Raney	Texas A&M University - Texarkana
Pat Richardson	Texas A&M University
Patty H Rodriguez	University of Texas - Brownsville & Texas Southmost College
Peggy D Rogers	ATI Enterprises, Inc.
Anna I Lopez	South Texas College
Laurie Rosenkrantz	University of Dallas



## TASFAA - 2009 Annual Report

Belen Valdez Texas A&M University  
 Gwineth F Yeager Tarrant County College  
 Trina Y Smith-Patterson Tarrant County College

### 15 Years of Service

Rosa M Alaniz Vernon College  
 Nita B Beavers San Jacinto College  
 Denise F Canady Richland College  
 Veronica J Cano University of Texas - El Paso  
 Miguel Carranza South Texas College  
 Cynthia R Chavez Baylor University  
 Joe Crutchfield ATI Enterprises, Inc.  
 Rich Cummings University of Texas - Dallas  
 John W Denton Lamar Institute of Technology  
 Rickey L Eddie University of North Texas  
 Lynda J Foster South Plains College  
 Alma Garcia Laredo Community College  
 Sandra Guzman College of the Mainland  
 Raymond Jaramillo Clarendon College  
 Janet M Hardrick McLennan Community College  
 Vicki J Kane San Jacinto College  
 Jennifer D Mayo Texas Southern University  
 Melissa Moncivais Texas A&M University - Kingsville  
 Kay Mooney Amarillo College  
 Aletha I Newman Vernon College  
 Ellen Nystrom University of Texas - San Antonio  
 Health Science Center  
 Kerry J Olson Lamar State College-Orange  
 Joseph P Pettibon Texas A&M University  
 Juan Pineda El Paso Community College  
 Leslie J Wells University of Houston -  
 Clear Lake  
 Arthur R Goudeau Texas Chiropractic College  
 Jana R Polansky Texas State Technical College -  
 Waco  
 Zella M Preston ITT Technical Institute - Richardson  
 Tommy N Thomason University of Houston - Downtown  
 Norma J Tobias Baylor University  
 Tammy L. Ward ATI Enterprises, Inc.  
 Greta A Wheeler Texas Woman's University

### 10 Years of Service

Rachel Atkins McMurry University  
 Frances Chapa Texas A&M University - Kingsville  
 Becky Crain Stephen F. Austin State University

Beverly Davis Kilgore College  
 Randal L Dement Lubbock Christian University  
 Charlotte D Farrington Texas A&M University  
 Lety P Gallegos University of St. Thomas  
 Larry D. Gantt Texas Southern University  
 Marian K Giesecke West Texas A&M University  
 Shannon Greeson University of Mary Hardin-Baylor  
 Ralpheal B Guilbeau Lamar University  
 Judi Haas Texas A&M University  
 Latasha R Hales University of Texas - Dallas  
 Lindy Hall LeTourneau University  
 Amy D Hardesty Lubbock Christian University  
 Diane Hargett Lamar State College-Port Arthur  
 Delia I Heras University of Texas - El Paso  
 Jennifer L Hoffpawier LeTourneau University  
 Judy Holley LeTourneau University  
 Rayanne L Hukill Weatherford College  
 Rebecca Innerarity Angelina College  
 Alisa B Jimenez Temple College  
 Brad S Johnson Howard Payne University  
 Linda Johnston Texas Woman's University  
 Maribel V Landa University of Texas - El Paso  
 Daniel Rodriguez Texas A&M University -  
 Corpus Christi  
 Susan R Russell Hill College  
 Alicia D Sanchez American Commercial College -  
 Lubbock  
 Suzanne Sealey Texas A&M University  
 Felicity J Swann Amarillo College  
 Ashley M Tatum North Central Texas College  
 LaRease Thomas University of St. Thomas  
 Liza R Valdez Texas A&M International University  
 Michelle Wells Midwestern State University  
 Erika Williams Tarrant County College  
 Latisha W Williams Midland College  
 Brent H Williford Lamar University  
 Terry Wright Baylor University





## TASFAA Budget FY 2009

**Texas Association of Student Financial Aid Administrators  
Audited Statement of Cash Receipts and Cash Disbursements  
November 1, 2007 through October 31, 2008**

**GARY, BOWERS & MILLER**

**GBM**

**CERTIFIED PUBLIC ACCOUNTANTS**

Steve Gary, C.P.A., PC  
James Bowers, C.P.A., PC  
Eric Miller, C.P.A., PC  
Melvin Eaker, C.P.A., PC

A Partnership of  
Professional Corporations

### **Independent Auditor's Report**

To the Executive Committee  
Of Texas Association of Student Financial Aid Administrators

We have audited the accompanying statements of cash statements and cash disbursements of Texas Association of Student Financial Aid Administrators for the year ended October 31, 2008. This financial statement is the responsibility of Texas Association of Student Financial Aid Administrators. Our responsibility is to express an opinion on this financial statement based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the statement of cash receipts and disbursement is free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts of disclosures in the statement of cash receipts and disbursements. An audit also includes assessing the accounting principles used and significant estimates made by the organization, as well as evaluating the overall presentation of the statement of cash receipts and disbursements. We believe that our audit provides a reasonable basis for our opinion.

As described in Note 1, this financial statement has been prepared on the cash receipts and cash disbursements basis of accounting, which is a comprehensive basis of accounting other than generally accepted accounting principles.

In our opinion the accompanying statement of cash receipts and disbursements referred to above presents fairly, in all material respects, the cash receipts and cash disbursements of Texas Association of Student Financial Aid Administrators for the year ended October 31, 2008 on the basis of accounting described in Note 1.

*Gary, Bowers & Miller*  
Gary, Bowers & Miller  
May 28, 2009



**Texas Association of Student Financial Aid Administrators  
Statement of Cash Receipts and Cash Disbursements  
Fiscal Year Ended October 31, 2008**

**Balance as of November 1, 2008**

Plains Capital Bank Checking	\$ 8,607
Plains Capital Bank Savings	14,296
Wells Fargo Bank Certificates of Deposit	15,000
Chase Bank Certificates of Deposit	48,603

**Total Cash and Cash Equivalents as of November 1, 2007** **\$ 86,506**

**Cash Receipts**

Membership Dues	\$ 22,500
Fall Conference Fees	103,760
Workshops, Spring Conference, Regional Rallies and Other Income	45,586
Investment Income	2,540

**Total Cash Receipts** **\$ 174,386**

**Cash Disbursements**

Fall Conference Expenses	\$ 15,036
Workshop, Training, and Regional Rally Expense	25,759
Board of Directors Expenses	9,588
Fall Conference Committee	785
Communications Network	5,270
Regional Training Opportunities Committee	17,302
Other Committee & Training Expenses	1,588
Secretary's, Treasurer's and Assistant's Stipends	3,850
Past President, President and President Elect Travel	3,060
President's Discretionary Fund	366
Scholarships	8,861
Other Expenses	14,180

**Total Cash Disbursements** **\$ 105,645**

**Cash Receipts in Excess of Cash Disbursements** **68,741**

**Balance as of October 31, 2008**

Plains Capital Bank Checking	\$ 79,808
Plains Capital Bank Savings	11,484
Wells Fargo Bank Certificates of Deposit	15,000
Chase Bank Certificates of Deposits	48,955

**Total Cash and Cash Equivalents as of October 31, 2008** **\$ 155,247**

The accompanying notes are an integral part of these financial statements.



## TASFAA - 2009 Annual Report

### Tax Status

TASFAA is exempt from federal income taxation under Section 501(c) (3) of the Internal Revenue Code.

### Cash and Cash Equivalents

For purposes and convenience of reporting, cash and cash equivalents are considered to be all cash and certificates of deposit.

### Investment Policy

Treasurer will keep cash on hand in an amount sufficient to meet expenses and to prevent overdrafts or service charges. Investments, stocks, bonds, and certificates of deposit amounts and distributions will be monitored by the Board.

### Note 2 - ING Investment Account

TASFAA maintains an investment account at ING. This account is not reported on the statement of cash receipts and disbursements, as it does not meet the definition for cash and cash equivalents in this cash basis financial statement. A summary of activity if this account at fair market value is as follows:

Beginning Balance November 1, 2007	\$ 450,424
Interest and Dividends Earned	26,638
Fees Paid	(5,425)
Unrealized Net Gains (Losses)	<u>(118,899)</u>
Ending Balance October 31, 2008	\$ 352,738

### Note 3 - Off-Balance Sheet Credit Risk

TASFAA maintains bank accounts as well as certificates of deposit at three banks. Accounts at an institution are insured by the Federal Deposit Insurance Corporation (FDIC) up to \$250,000. Cash at all three institutions were under federally insured limits at October 31, 2008.

TASFAA maintains a brokerage account. This brokerage account is insured by the Securities Investor Protector Corporation. The SIPC provides protection for all securities registered in TASFAA's name in amounts up to \$500,000 per customer for failure of a brokerage house. At October 31, 2008, the balance at the brokerage house did not exceed this insured amount.





## TASFAA Volunteer Form

TASFAA is a volunteer organization. Your participation is needed. Membership on a committee benefits your colleagues, students and parents, as well as providing an opportunity for personal and professional development.

If you have further questions regarding the activities of a specific committee, please feel free to contact the current Committee Chair or a member of the Executive Board.

**Please Note: YOU MUST BE A CURRENT MEMBER OF TASFAA TO SERVE ON A COMMITTEE.** If you are not a current member please complete a membership application. If you don't know if your TASFAA membership is current you can check your membership status when completing this form.

The form can be found at [www.tasfaa.org](http://www.tasfaa.org) under "Member Services".





# Notes



**TEXAS ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS**

**THE TASFAA ANNUAL REPORT WAS CREATED BY  
THE NEWSLETTER/PUBLIC RELATIONS COMMITTEE**