



Texas Association of
Student Financial Aid Administrators

A white sailboat with a large white sail is sailing on a blue ocean under a clear sky. The boat is viewed from a low angle, showing the deck and the base of the mast.

Charting a New Course
2010 Annual Report



President's Message

by Carolyn J. Jones

Dear TASFAA Members,

It has been an amazing year as your president. It has been quite a learning experience for me and I want to take a moment to thank Rick Renshaw and Kay Mooney for all of their help this year. I truly would not have been able to make it through the year without their help and guidance!

We have seen major changes in financial aid this year. As always, the professionals that make up TASFAA have once again risen to the occasion and implemented the 2 Pell awards in one year and all schools converting to Direct Loans. We also had the Top 10% Scholarship program and more budget cuts from the State. You continue to do more with less and it is amazing to see your dedication to the students of Texas! I am very proud to be a part of the profession and of TASFAA.

As we continue to navigate through the changes in our regulations I know that TASFAA will continue to be a strong force for information and training for all members. The board has worked hard this year, and the past few, to keep our association strong financially. We are continuing to work to balance our budget and to construct new training events around the state. The Membership Committee has been seeking new members to keep TASFAA strong and representing all schools in Texas. The Early Awareness Committee trained 703 High School Counselors. TASFAA representatives also testified in Austin in February and April. Lisa Blazer, Joe Pettibon, Rick Renshaw, Tom Melecki and Rob Sheridan were invaluable in educating our legislatures on financial aid issues. The New Aid Officers Workshop trained 72 new financial aid professionals. TASFAA is currently seeking volunteers to carry out our mission in 2010-2011 with Joe Pettibon as our President.

I would like to thank all of you for your support as my husband and I have been battling his cancer. He is doing well and I believe that is a direct result of all of the love and prayers we have received from around the state. May you each be blessed as you have blessed us!

Sincerely,
Carolyn J. Jones
TASFAA President 2009-2010

Officers 2009-2010

President

Carolyn J. Jones
Collin County
Community College

Vice President

Kay Mooney
Amarillo College

President Elect

Joseph Pettibon
Texas A&M University

Past President

Richard Renshaw
Dallas County
Community College
District

Treasurer

Tia Clary
Lubbock Christian
University

Secretary

Amy Hardesty
Lubbock Christian
University

Board Members

Mike Carranza, South
Texas College
Laurie Coulter, Austin
College
Enrique Garcia, Del Mar
College
Amanda Jurovic, Rice
University
Karen Krause, University
of Texas at Arlington
Dana Mingo, Eastfield
College
Shannon Crossland,
Texas Tech University
Richard Silva, Alamo
Community College
District
Ed Turney, Board
Member at Large,
University of North Texas



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.

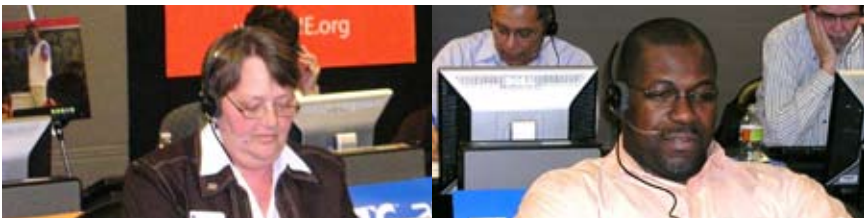
TASFAA Volunteer Form

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 under "Member Services".





TASFAA Committee Reports

Awards Committee

Carolyn Mallory, Chair - University of Houston at Victoria

(malloryc@uhv.edu)

Caitie Blount - TDECU

Irma L Chapa - Lone Star College System

Karen Collins - Midwestern State University

Rickey L Eddie - University of North Texas

Rayanne L Hukill - Weatherford College

Jackie Stevens - Parker College of Chiropractic

Cathleen F Wright - Texas Lutheran University

Prior to sending out the 2009-10 service pins, the committee needed to replenish the supply of pins. The Awards Committee distributed the following Years of Service pins:

- 6 pins for 35 Years of Service
- 13 pins for 30 Years of Service
- 21 pins for 25 Years of Service
- 40 pins for 20 Years of Service
- 45 pins for 15 Years of Service
- 56 pins for 10 Years of Service

Congratulations to all and thank you for your dedication to TASFAA and the financial aid profession.

The TASFAA Time Capsule website for the past Trailblazer, Hall of Fame, and Financial Aid Star Advisor Award recipients was updated. In addition, the Awards Committee Timeline section of the web page was updated.

Nominations for the Financial Aid Star Advisor and Hall of Fame awards were solicited. After reviewing the nominations, the committee's recommendations were sent to the TASFAA Board for their consideration. The recipients of the awards will be announced at the TASFAA Conference October 2010.

Communications Network Committee

Alan D. Ahmad, Chair - Texas A&M Health Science Center
(ahmad@tamhsc.edu)

Activity during the 2009-2010 year focused on the Committee's primary objective of assisting the TASFAA community with information on and about the Association's website and operating as liaison between the Association and the website administrator, ATAC Corporation. Committee services included the monitoring of administrative services, development of training and workshop registration and information and the posting of forms and presentations.

The 09-10 year also saw the introduction of a new module/mini-site within the TASFAA website. This ATAC module can be attributed to this year's Fall Conference Committee and is designed as a useful tool for the planning, scheduling and presentation of conference and workshop information. The module's initial application is this year's 2010 Fall Conference mini-site.

The Association website has seen over one hundred thousand (100,000) visits between August 2009 and August 2010 with *Employment Opportunities*, *Training* and *Member Services* as the most frequented pages. Additional 2009-2010 website activity includes a main page redesign, revised Committee pages and calendar of events as well as routine updates and maintenance. In the future, the Communications Network Committee hopes to increase its exploration of beneficial web based opportunities and resources.

Fall Conference 2010 Committee

Anne E. Walker, Chair - Rice University
(anne.walker@rice.edu)

Jan-Louson G Abasolo - University of St. Thomas

Phillip Applebaum - Brazos HESC

Wally Boudet - Discover Student Loans

Valerie N Bustillos - Tarrant County College

Vincent D Carales - TG



Committee Reports

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Connie P Castillo - Houston Baptist University
Irma L Chapa - Lone Star College System
Casey Creel - Wells Fargo Education Financial Services
Keith A. Dickson - TG
Caroline S Hernandez - TG
Jeneen Holmes - Rice University
Vicki S Jacobs - Wharton County Junior College
Donna King - Grayson County College
Marisela O Maldonado - Rice University
Lynda McKendree - University of St. Thomas
Marcos J Mendez - Texas A&M University
Scott A Moore - Houston Community College System
Beth B Reid - University of Texas - Arlington
Diana I Stout - Tarrant County College
Debra G Wilkison - Collin County Community College
Cathleen F Wright - Texas Lutheran University
Jason R Young - University of Texas - Arlington

This year's conference theme is "Charting a new Course". The conference committee has been working hard to plan an interactive and informative professional development conference. The conference will be held at the Galveston Convention Center on October 6-8, 2010 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 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 presentations from professional development to issues that are specific to school processing. Important to note this year is that the majority of sessions being presented are sessions that schools have developed for the TASFAA Community. Presenters and guests for this year's conference will be colleagues from area

colleges and universities, Federal Student Aid Office, and Texas Higher Education Coordinating Board. The opening luncheon will begin with remarks from our current President Carolyn Jones, followed by guest speaker Tamra Lewis whose motivational keynote address will be about navigating our way through changing times. Galveston Texas has rebuilt and looks better than ever since Hurricane Ike made its presence known two years ago. We have planned an exciting evening event, TASFAA's very own Cruise Ship which will be held in the Galveston Convention Center. Be ready to gamble, dance to live music and a DJ, sing Karaoke, and join us for a night of fun as we conclude a week of work, collaboration, and networking during the conference.





Constitution/Bylaws Committee

Shannon L. Crossland, Chair - Texas Tech University

(shannon.crossland@ttu.edu)

Kathy A Bassham - Weatherford College

Irma L Chapa - Lone Star College System

Shannon L Crossland - Texas Tech University

Delisa Falks - Texas A&M University

Linda A Gonzalez-Hensgen - El Paso Community College

Timothy J Matusheski - Not Affiliated with an Institution

Carol L McDonald - Independent

Colleges and Universities of Texas, Inc.

Marcus O Wilson - Texas Tech University Health Sciences Center

Committee Goals:

The Constitution and Bylaws Committee review the Constitution and Bylaws as well as the TASFAA Policies and Procedures Manual of the Association for appropriateness and consistency as they govern the activities and needs of the Association.

Committee Objectives:

1. Ensure the Constitution, Bylaws, and TASFAA Policies and Procedures are updated.
2. Ensure accuracy and consistency among the Constitution, Bylaws, and TASFAA Policies and Procedures Manual.
3. Attend all Board meetings and review the minutes after each meeting to incorporate all required changes per Board and Association membership actions.
4. Prepare for Board or Association action any changes necessary to govern the activities and needs of the Association.

Committee Accomplishments:

- Formatted and edited TASFAA Constitution and Bylaws and TASFAA Policies and Procedures Manual for consistency and ensured any changes had been incorporated and no conflicting information existed.

Both of these documents are posted on the TASFAA website.

- Posted Constitution and Bylaw Amendments to TASFAA ListServe on September 7, 2010 for membership comments. Vote will take place at the TASFAA Business Meeting October 7, 2010.

Early Awareness Committee

Linda A. Gonzalez-Hensgen, Co-Chair - El Paso Community College (lgonz265@epcc.edu)

Raul H. Lerma, Co-Chair - University of Texas at El Paso (rlerma@utep.edu)

Marci Beasley - Texas Tech University

Linda A Gonzalez-Hensgen - El Paso Community College

Don W Hilton - Ranger College

Richard Sapp - TG

Lynda Sheets - Not Specified

Jessica Solcich - Not Specified

Mary T Teel - Texas A&M University

Cathleen F Wright - Texas Lutheran University





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NT4CM Training Program Statistics

	Region	Date of Training	Attendees
Jael Garcia	1	12/07/09	86
Bonnie Trevino	2	12/10/09	32
Sharon Mullins	4	12/16/09	22
Patricia Sermas	4	01/07/10	68
Diane Hargett	5	12/11/09	38
Delinda Hall	7	11/17/09	29
Linda Slawson	8	01/21/10	32
Melissa Elliott	9	12/14/09	49
Laurie Coulter	10	01/12/10	29
Trudy Conner	11	12/09/09	42
Jackie Adler	12	01/21/10	55
Shannon Sonnenberg	15	01/08/10	25
Kay Mooney	16	11/20/09	83
Amy Hardesty	17	12/09/09	38
Elsa Lopez	19	12/17/09	55
Joyce Fox	20	02/16/10	20
Total			703

First of all, I would like to thank Carolyn for the opportunity to assume the chair of the Early Awareness Committee. It was definitely a new challenge for me coming in a bit late.

It was indeed an interesting experience transitioning to a new training program. The NT4CM training program is different from what we have been used to, from training materials, to the paperwork that is required such as a Training Session Information Form required of every training site. Obviously the biggest advantage to the program is that the program and its materials are free. Considering the association's financial condition this is certainly a great benefit.

I certainly want to sincerely thank all the trainers that assisted at the training sessions and especially those that assisted in coordinating the training in their region. I appreciate the patience they had with me throughout the training. I was very grateful for their understanding that TASFAA was not going to be able to reimburse costs such as food. They all took it upon themselves to address this at their sites.

Evaluations but, for the most part it appears those who attended were pleased with the training giving mainly 4's and 5's on the evaluations that range from 1 being

Unacceptable to 5 being Outstanding/ Much more than acceptable. As far as feedback from the region coordinators that have responded, it appears they prefer the TASFAA Handbooks. I will follow up with an article for the TASFAA Times.

Challenges:

- Main way to communicate with NT4CM is by email. Although they did respond rather quickly and were very helpful, it is hard to get someone in person;
- Delivery of materials. Materials were sent to one location (Region 15 Angelo State). I can't thank Shannon enough for arranging to have the materials forwarded to the appropriate sites. Thank you Carolyn for stepping in to help with the cost.
- Additional paperwork i.e. Training Session Information form;
- This is almost a year long process;
- Regions that were not able to provide a training site;
- The weather was a factor with one site having to reschedule;
- No reimbursement for food.



Finance Committee

Joe Pettibon, Chair - Texas A&M University (jpp2@tamu.edu)

Lisa G Blazer, PhD - University of Texas - San Antonio

Tia Clary - Lubbock Christian University

Carolyn J Jones - Collin County Community College

Richard C Renshaw - Dallas County Community College District

The Finance Committee has primarily been reviewing the TASFAA annual budget to prepare a balanced budget for 2010-11. Over the past three years, the Association has relied on reserve balances to offset annual operating costs due to declining conference attendance following changes in the industry. Several changes will be adopted when the next budget is approved in October 2010, including the already approved increase in institutional membership dues. At the July 2010 board meeting, the institutional membership dues were set to \$200 annually.

Further, the Association changed its investment management company from ING to Rodgers Capital this summer, following the recommendation at the February 2010 board meeting to remain with Gary Rodgers as our investment manager. The Association has a long history and strong relationship with Gary that we believed was important to retain.

Finally, the committee made a recommendation to the board to develop and adopt an advertising policy (or clearly articulate the existing one) as several organizations have approached the Association to advertise on our website or at the annual conference. The board is expected to review options at its October 2010 meeting.

Legislative Issues Committee

Tom Melecki, Chair - University of Texas at Austin

(tom.melecki@austin.utexas.edu)

Membership Committee

Lynn Barnes, Chair - Texas A&M University (lbarnes@tamu.edu)

Terry Bazan - Austin Community College

George H Durstine - Panhandle Plains Student Loan Center

Jeannie Gage - Texas A&M

University - Corpus Christi

Dolly A Lasater - Texas A&M

University - Commerce

Marcos J Mendez - Texas A&M University

Membership Committee experienced a very successful year. Despite the vast amount of change that each of our institutions has had to face this year, we are closing the year very strong in terms of the number of institutions who either renewed their membership or joined for the very first time. The committee is pleased to report that membership now exceeds last year's membership - we are currently at 218 member institutions (last year there were 213 member institutions).

2009-2010 Membership breakdown:

Schools	182 (83%)
Not Specified	12 (6%)
Lender	11 (5%)
Servicer	5 (2%)
Guarantee Agency	5 (2%)
Secondary Mkt	2 (.9%)
Govt Agency	1 (.5%)

Membership History:

2009-2010	218
2008-2009	213
2007-2008	238
2006-2007	256
2005-2006	275
2004-2005	262

In the beginning of the Fall semester, the membership website was updated with current information and the committee met several times during the semester. Several emails were sent out on the listserv to encourage institutions to renew their membership. In the spring semester, efforts were focused on emailing and calling institutions which have been out of TASFAA for a period of time. Many institutions had



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new staff and were either not aware of their membership status or were not aware of the benefits of membership. We encouraged them to renew and to get involved.

This past year the board voted to increase membership dues by \$25 per institution which has helped with total revenue generated for our organization. Additionally, we have seen several institutions come back into membership after several years of not renewing, and also we are seeing some new members come into the organization. Of the institutions who chose not to renew their membership this past year, 16 were non-school organizations and 7 were schools. This is not surprising due to all of the change within our industry. However, we are very pleased that 10 new institutions joined TASFAA for the very first time!

Mentoring, Leadership & Diversity Issues Committee

Belen Valdez, Chair - Texas A&M University (belenvaldez@tamu.edu)
Joy Dailey - Texas Southern University

- I took over as Chair in May after the resignation of the previous chair. Actually I volunteered to assist with the pairing and later found out I was the new chairperson. I gladly accepted.
- Carolyn Jones sent me a list of 25 protégé requests and 13 mentors.
- An email was sent to all protégés and mentors to make sure that they were still interested in the program. It seems that the list was a bit outdated and found that some protégés were no longer in financial aid and some felt that they did not need the mentoring. Some of the mentors were no longer interested as well.
- After a call for more mentors from our TASFAA members and more protégé requests from NAOW in May, we ended up with 17 protégés and 15 mentors. 15 protégés have been paired with a mentor. We have 2 pending protégés and 1 more possible mentor.
- We were not able to pair everyone by software but tried to find other similar characteristics.

- I have not received any feedback yet since the pairing up of mentor to protégé is very recent. I hope to have more updates at a later time.

Newsletter/Public Relations Committee

Melet Leafgreen, Vice-Chair - Texas Christian University
Alan D. Ahmad - Texas A&M Health Science Center
Jess Black - Angelo State University
Don Buehrer - Nelnet
Christopher D. Murr, Ph.D. - Texas State University
Harold Whitis - Texas A&M Health Science Center
Caroline Hernandez - TG

The TASFAA Newsletter/ Public Relations Committee has enjoyed a great year. We have produced four TASFAA Times Newsletters this year and have received positive feedback from the membership on both the content and the PDF format. The next TASFAA Times will be published at the beginning of 2011.

Our other main project, the TASFAA Annual Report, came together quite smoothly. We will be using the same printing company as last year, and as I write this we are making decisions regarding how many hard copies to print. In addition to handing these out at the annual conference, we will also mail copies to every college president in Texas, all state legislators, a few key US Senators, and President Obama. This year our goals for the Annual Report were: (1) to complete it as early as possible so that it could be distributed to the membership throughout the fall conference, and (2) to decrease, if possible, the overall cost to TASFAA. We are happy to say that we expect to meet both of those goals!

Committee reports from the Chairs, and all other stories and comments from TASFAA Members and friends of TASFAA are so appreciated. Keep 'em coming! Any pictures you can provide are much appreciated as well. Melet Leafgreen has agreed to chair this committee for another year, and looks forward to that opportunity. We thank you, the Membership, for your continued support!



Nominations & Elections Committee

Caren A. Stewart, Chair - ATI Enterprises, Inc.
(cstewart@atienterprises.edu)
Don Buehrer - Nelnet
Tina M Chargois - Not Specified
Belen Valdez - Texas A&M University

The nominations and elections committee has worked very hard this year to obtain candidates for the eight (8) open positions on the board.

Nominations opened in May 2010 and we received several nominations; we did not receive many nominations for the position of President Elect so the board approved that the nominations be re-opened, to members without experience as elected board members.

Elections are scheduled to begin on August 9th, 2010 and we expect to close on August 20th 2010. The results will be delivered to the membership during the Fall conference in October.

Thanks to the other committee members; Don Buehrer and Belen Valdez for their hard work during the year. It has been a pleasure serving the TASFAA membership and I look forward to other volunteer opportunities in the future.



President's Advisory Council

Richard C. Renshaw, Chair - Dallas County Community College District
(rrenshaw@dcccd.edu)
Deborah Arnold - University of North Texas
Kathy A Bassham - Weatherford College
Lisa G Blazer, PhD - University of Texas - San Antonio
Carolyn Cunningham - University of North Texas
Santa Garza - University of Texas - Austin
Linda A Gonzalez-Hensgen - El Paso Community College
Robert Haines - Midland College (retired)
Earl Hudgins - Panhandle Plains Student Loan Center
David Krause - St. Mary's University
Karen A Krause - University of Texas - Arlington
Jimmy Parker - Panhandle Plains Student Loan Center
Claire (Micki) Roemer - U.S. Department of Education (retired)
Judy Schneider - Financial Aid Services, Inc.
Robert B Sheridan - University of Houston - Downtown
Marcus O Wilson - Texas Tech University Health Sciences Center

The President's Advisory Council for Planning and Evaluation (PAC) 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 Council's focus for the 2009-10 year was on Initiative #3 - TASFAA Fiscal Stability. The council was asked, specifically, to investigate the feasibility of proposals to restructure membership dues that would increase the voting membership of the association and generate annual revenues that would sustain the essential operational costs of the association in the new paradigm of financial aid after the elimination of the Federal Family Educational Loan Program (FFELP). The council was also asked to consider, "What should be the main deliverables of the association?"



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The PAC reported its discussions back to the board at the spring meeting but did not present specific recommended actions. Regarding the structure of membership dues the PAC observed that both SWASFAA and NASFAA use a tiered dues structure based on school enrollment. However, the council could not determine if tiered structure would generate more revenue or more membership participation.

The PAC was unanimous in considering training to be the most important and essential deliverable product of the association. The New Aid Officers Workshop and the regional High School Counselor Training Workshop were identified as premier activities provided by TASFAA. The PAC also identified legislative advocacy for improving financial aid access and opportunity for Texas students as another important activity for the association. Peer networking and creating opportunity for professional development of financial aid staff were also areas that TASFAA should continue to offer as services and benefits of the association.

Scholarship Committee

Christina L. Quintanilla, Chair - Texas Lutheran University

(cquintanilla@tlu.edu)

Griselda Castilla - University of Texas - Pan American

Laurie S Coulter - Austin College

Kathy M Day - Not Affiliated with an Institution

Rayanne L Hukill - Weatherford College

Dana N Mingo - Eastfield College

Elsa M Ramos - University of Texas - Austin

In late March, the scholarship committee invited everyone to apply for the Mack C. Adams Professional Development Scholarship. The scholarship was made available for the New Aid Officers Workshop (NAOW) in May. This scholarship was designed to assist financial aid professionals with the cost of attending TASFAA-sponsored training opportunities. Along with financial assistance, recipients also receive an opportunity to grow as a financial aid professional and make important connections with others in their field. Applications for the

NAOW scholarship were made available in late March. The deadline to submit the application was April 9th and recipients were notified by April 23rd. There were 26 applicants for the Mack Adams scholarship, and 8 scholarship recipients. Due to budget constraints, the TASFAA board elected not to award the Mack Adams scholarship for the fall conference. Future scholarships are expected to be awarded using proceeds from upcoming fundraisers. The TASFAA Board will continue to discuss the future of the Mack Adams scholarship and its place and purpose within our organization.

Site Selection Committee

JimAnn Batenhorst, Chair - South

Plains College

(jbatenho@southplainscollege.edu)

Phillip Applebaum - Brazos HESC

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.





Committee Reports

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Regional Training Committee

Lisa Blazer, Chair - Univ. Of Texas at San Antonio (Lisa.Blazer@utsa.edu)

April M Gonzales - University of Texas - San Antonio

Jose M Guerrero - North Texas Higher Education Authority/HESC

Dana N Mingo - Eastfield College

Consuela P Mitchell - Tarrant County College

James D Reed - West Texas A&M University

Training Topics: Introduction to Communication Styles; Needs Analysis and Professional Judgment; State Programs (by THECB staff); Am I Independent or Dependent; Veteran Issues/Eligibility

Locations:

April 21st - Lubbock Lubbock Christian University - 25 attended

April 29th - Corpus Christi Delmar College - 16 attended

April 30th - Dallas Area Tarrant Co Community College - 28 attended

May 5th - San Antonio University of the Incarnate Word - 33 attended

May 11th - Houston Houston Community College - 42 attended

May 13th - El Paso El Paso Community College - 27 attended

TOTAL 171 attended

Training Cost = \$30

Notes: Tentative revenue and costs are provided through the treasurer's report. We are still waiting on a few institutions to pay their fees. We need to establish a better refund policy because we have some individuals that register and never attend and do not want to pay for the event. We also have some institutions that have taken quite a bit of time to pay their fees (I know of 2 institutions for a total of 10 people that still need to be paid). We will likely have a small shortfall between revenue and costs to perform the training. I had originally scheduled the trainers so that there would be minimal travel based on the location

10 of the training and the trainer's location. Unfortunately, we had at

least 1 person completely drop out due to the health reasons and another had to back out of a training session. Because of that, either me or April Gonzales traveled to additional locations, causing an increase in travel expenses. We also helped to cover the travel costs for THECB as well.

Obviously, we would like for the Regional Training to be self-sufficient. However, I would respectfully request that we evaluate whether membership dues paid should cover a portion of the training each year especially in light of the fact training is a core component of our mission.

EVALUATION SUMMARY

Overall, participants enjoyed the sessions. It really depended on presenters and how they were matched with the topics. At some locations, we had the perfect mix of trainers and that allowed for each of us to play off of our strengths. Next year, we should really consider evaluating the personalities to match with the topics so that we can optimize our efforts.

Comments From Participants Include:

What was your expectation of this conference? Did the overall training meet your expectations?

Only 3 individuals expressed that the conference somewhat or did not meet their expectations fully. The remaining comments were positive and expectations were met.

What was your overall impression of the series (location, topics, depth)?

Most comments were positive stating that we covered enough material and the topics were well received. There were only a couple of people that wanted more detail on topics or felt we were rushed.

Which topics were the most beneficial to you (or which did you enjoy the most)? Why?

All of the topics had fans. People liked the variety. They really liked the needs analysis topic the most along with professional judgment. Many people liked the state program update as well.



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Which topics were the least beneficial to you (or which did you enjoy least)? Why?

Some participants had been in financial aid for several years and thought the dependency topic was basic. Some private institutions didn't feel they needed the state program update because it focused more on programs for state schools. The veterans information was not as pertinent to some individuals. Of course, some folks liked the communication topic and some didn't.

What suggestions would you offer to improve the training?

Use more case studies; provide more best practices; increase quizzes and exercises; more references to SFA handbook; internet accessibility during training; residency; state update first or last; better food; double-check handouts; less stations to post comments; have more surrounding schools attend; spend more time on topics and bring scenarios from the office to discuss; time was short; could it be done at an earlier time like January or February; more of BC issues/changes

Ideas for future training topics:

Work-study information/FERPA - how each college deals with this situation; more on direct lending conversions; customer service 101; human side and financial aid counseling; More student/employee communication techniques; go over FAFSA form; year round pell grant; student retention; panel discussion on PJ issues; dealing with conflict; more detailed review of state and grant programs; appeals; elaborate on verification; how schools verify; what does DOE do with FAFSA, how is it processed; ACG; don't go too fast; direct lending and discharge loans c-flag; do it earlier.

Session Evaluations (poor, average, good, excellent)

See What You Say Session

Overall Impression of the Session:
60% rated excellent; 37% rated good; 3% rated average

Comments include:

The communication style was or did not

go as in depth as I would have liked-more about how people (students) communicate; Add Activities; Numbers on slides to correspond with number on slide handouts; Communication assistance is always appreciated; My complain is that the handouts were No rhyme or reason; Would have liked to engage in some group activities that we didn't have time to get to; It was such fun, and nice to know my color; April did excellent job!

Needs Analysis & Professional Judgment

Overall Impression of the Session:
68% rated excellent; 28% rated good; 4% rated average

Comments include:

Sessions were very interesting; too bad the training was cut short; great job April; more real case scenarios; great job; a little rushed and glad we finished after lunch; a few more minutes would be appreciated; good refresher for old and new alike; great job; information was well presented-you know your stuff; presenter was a great subject matter expert; it felt like no real structure; would think that each section should be done individually not skipped around.

State Programs Session

Overall Impression of Session
57% rated excellent; 40% rated good; 3% rated average

Comments include:

Good summary review-enjoyed the charts provided

Am I an Independent or Dependent Student Session

Overall Impression of the Session:
59% rated excellent; 38% rated good; 5% rated average

Comments include:

It should have been broader topic/discussion with more and specific examples and exercises; excellent; very redundant should not be done apart from EFC; refreshed my memory on this topic-it has been a while that I work with this topic; good information



Veteran Benefits Session

Overall Impression of the Session

45% rated excellent; 48% rated good; 7% rated average

Comments Include:

A little bit brief, maybe go over the different chapters; I don't feel the gallery wall as very effective; more details about the chapters-general information; glad they sent me to this workshop, I learned a lot; great job; food was great; she had a clear voice with great tone; a great asset to your office; not familiar with this topic; presenter presented all topics very well; documentation and handouts were difficult to flip through

Training Committee

Devon Wiggins, Chair - Tyler Junior College (dwig@tjc.edu)

Lisa G Blazer, PhD - University of Texas - San Antonio

Valerie N Bustillos - Tarrant County College

Vincent D Carales - TG

Yolanda M Cleveland - University of Texas - Arlington

April M Gonzales - University of Texas - San Antonio

Consuela P Mitchell - Tarrant County College

Elena Olivier - San Jacinto College

Christina Palacios - Tarrant County College

Erin M Porter - Texas A&M University

Shana Thompson - Northwood University

Wesley M Vanderburg - Education Futures Group, LLC

Denise Welch - Panola College

Devon Wiggins - Tyler Junior College

"additional" duty has been phenomenal.

The first training event of the year was the ABC Workshop held in conjunction with the Fall Conference. The 2009 ABC Workshop had 78 attendees. This was the largest ABC workshop in the past 5 years and was a 55% increase from the prior year. Total revenue was \$5,330.00.

The second event of the year was the New Aid Officer's Workshop held in the Spring. The 2010 NAOW had 79 registered "campers". Total revenue was \$33,050.00. This event is an intense three day financial aid "boot camp" for financial aid staffers that have been in the industry for less than one year. Attendees learn the basics and make invaluable friendships to help form a network of peers to lean on through the years. Camper evaluations were received and reviewed. The overall result is that the event was successful but some minor adjustments will be made based on camper's concerns.

We would like to thank ALL of the presenters that made these training events possible. We truly appreciate the time that they took to prepare and present their sessions. We ARE RECRUITING now for our future training events for anyone that is interested!

We are making preparations for the 2010 ABC Workshop in October and know that it will be a unique and valuable learning experience for those who attend.

We would also like to thank the TASFAA Board for their support and financial backing of the Training Committee and each professional development event.

The Training Committee has worked diligently to plan and coordinate the two major training events held each year. Subcommittees were formed to increase productivity and narrow the focus of committee related responsibilities and duties. The committee members have all done an amazing job and have worked as a team in every aspect. Their dedication and commitment to this



2009-2010 Service Awards

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2009-2010 TASF AA Service Awards

2009 Service Award Winners

Star Financial Aid Advisor - Joyce Fox, UT-San Antonio

Hall of Fame - Kathy Bassham, Weatherford College

Trailblazer - Rick Lasly, Angelo State University

Years of Service Award Winners

40 Years of Service

Ronny Barnes	Panhandle Plains Student Loan Center
Margarine G Beaman	Conlee College of Cosmetology
Vera Moore	Prairie View A&M University
James E Shaw	Southside Bank

35 Years of Service

Jane I Caldwell	Texas Higher Education Coordinating Board
Beverly Cottingham	Retired
Cathryn Wright	Opportunity Plan, Inc.
Terry Wunsch	Collections Unlimited
Donald G Zackary	Dallas Baptist University

30 Years of Service

Yvonne Apodaca	El Paso Community College
E. Raedean Bolton	Texas Woman's University
Frank Evans	ATI Enterprises, Inc.
Michael A Novak	US Department of Education
David Schwartz	Texas A&M University
Lyn Wheeler Kinyon	Texas Higher Education Coordinating Board

25 Years of Service

Jacqueline L Bozeman	ATI Enterprises, Inc.
Lamar M Duarte	Palo Alto College
Kay Egbert	Texas A&M Health Science Center
Memory L Keeler	Not Specified
Jeanette Kucera	Baylor University
Karen T Mangum	Not Specified
Hazel Risley	Univesity of Houston - Downtown
George C Torres	TG
Barbara Waters	Southern Methodist University



20 Years of Service

JimAnn Batenhorst	South Plains College
Peter J Beilharz	St. Edward's University
Reggie Brazzle	Lone Star College System
Brenda D Britt	Grayson County College
Dean Carpenter	KeyBank-Key Education Resources - Austin
Sandra G Collins	Dallas Nursing Institute
William S Delgado	Alamo CCD
Delisa Falks	Texas A&M University
Marquita R Hackett	University of Texas - Tyler
Kathy J Hall	Not Specified
Sandra Jones	McLennan Community College
Marla G Long	Concorde Career Institute
Cynthia R Mayberry	TG
Barbara A McDonald	University of North Texas
Sharon M Mullins	Lee College
Arlene Murray	Tarleton State University
Debbie Oliver	Abilene Christian University
Ralph Perri	Texas A&M University - Kingsville
Maria Reyes	El Paso Community College
Letitia M Reyna	Not Specified
Patrick G Reyna	Baptist Health System School of Health Professions
Lisa L Seals	Not Specified
Pamela D Shuttlesworth	Mountain View College
Trevor Summers	US Department of Education
Vickie S Tanner	TG
Kathy Williams	ELM Resources
Grace A Zapata	St. Phillip's College

15 Years of Service

Paula R Baxter	University of Texas - Dallas
Jan Benton	Amarillo National Bank
Jan Carey-McDonald	University of Texas - San Antonio
Michelle Coburn	Panhandle Plains Student Loan Center
Lawrence R Contéro	St. Edward's University



2009-2010 Service Awards

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Christopher W Elam	Campus Door
Art G Escobar	San Jacinto College
Sergio Gonzalez	Sallie Mae Texas
Ayeesha J Green	TG
Marsha Halfmann	Not Specified
Jennifer Herman	University of North Texas
Elva B Leija	Alamo CCD
Ric Lewis	Central Texas Commercial College
Kimberly Mosley	Eastfield College
Vickie Murillo	Not Specified
Mia C Myers	Texas Tech University Health Sciences Center
Elena Olivier	San Jacinto College
Clarissa Peereboom	Regions
Victor M Puente	Not Specified
Adriana Quintero White	Not Specified
Sharon D Rodriguez	Not Affiliated with an Institution
Rosanna Rodriguez-Ferguson	South Texas Vocational-Technical Institute
Juan Antonio Ruiz	San Antonio Federal Credit Union
Celinda Sarabia	Texas A&M International University
Treanell Scott Walters	Lone Star College System
Yvonne Trevino	Del Mar College
Deborah Whitis	THECB
Paul Wright	Edfinancial Services
10 Years of Service	
Rebecca Akin	Not Specified
Becky Akin-Sitka	University of Texas - Austin
Janie Alcalá	Texas A&M University
Sylvia F Amann	Not Specified
Yomaira Arrendondo	Brookhaven College
Jeanne Ballard	Vernon College
Scott R Berg	Education America - Little Rock
Vera A Boda	Pharr-San Juan-Alamo Independent School District
Billy Bossier	University of Texas - Austin
Judith W Branch	Regions
Tammy L Burch	Franklin Bank, S.S.B.

2009-2010 Service Awards



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Samuel Caldera	Student Loan Xpress
Grace Calixto	Hallmark Institute of Aeronautics/Technology
Miguel Carranza	South Texas College
Griselda Castilla	University of Texas - Pan American
Karen J Chambless	Not Specified
Leigh Ann Clark	Not Specified
Yolanda M Cleveland	University of Texas - Arlington
Jeannette Costello	Eastfield College
Adrian Cuellar	International Business College
Rachel E Dixon	Lamar University
Heather A Domeier	Rice University
Janet B Dragoo	Not Specified
Stan Eddy	Southern Methodist University
Maria Faber	El Paso Community College
Mike G Fuller	First Marblehead Corporation
James Gaeta	Southwestern University
James B Gammon	Not Specified
Lucio Garcia-Zuazua	Sul Ross State University-Rio Grande College
Marian Giesecke	West Texas A&M University
Arthur R Goudeau	Texas Chiropractic College
Denise Hall	University of Houston
Charita Hampton	University of Houston
Dorothy L Hampton	University of Texas - Arlington
Darrell L Horn	Abilene Christian University
Jared Hunt	First Service Credit Union
Dottie A Kyle	Not Specified
Melet Leafgreen	Texas Christian University
Daffne A Liberato	Not Specified
Elizabeth Lopez	Texas A&M International University
Miroslava Martinez	Not Specified
Mark E McCarty	Southwestern Professional Institute
Sharetta McKenzie	DeVry University - Irving
Tammy D Minton	Tyler Junior College
Bob Paton	Bank of America
Augustin Perez	Capital One





TASFAA Service Awards

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Dolly Pierson	Texas Christian University
Cornelius T Pruitt	ITT Technical Institute - Austin
Barry D Pupella	Not Specified
Margaret L Quintanilla	Alamo CCD
Rachel M Ramirez	International Academy of Design and Technology
Yolanda T Ramos	Midland College
Glenna Reeves	Not Specified
DeCha S Reid	Cedar Valley College
Lisa Rolfe	State Beauty Academy
Chris Scott	Collegiate Funding Services
Irene Smith	COSTEP
Ted Sparks	Wachovia Education Finance
May Steigman	University of Texas - Austin
Denise S Sullivan	Citibank
Robert Z Trevino	University of Texas - Pan American
Robin L Walker	Vetterott Educational Centers, Inc.
Terrye Waller	Texas Tech University
Bruce M Ware	Everest Institution - Hobby Campus
John W Wells	El Centro Community College
Molly M Williams	Tyler Junior College
Noko T Wilson	Austin Community College
Laura S Young	BancorpSouth





**Texas Association of Student Financial Aid Administrators
Audited Statement of Cash Receipts and Cash Disbursements
November 1, 2008 through October 31, 2009**

Independent Auditor's Report

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

We have audited the accompanying state of cash receipts and cash disbursements of Texas Association of Student Financial Aid Administrators for the year ended October 31, 2009. 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 cash disbursements is free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the statement of cash receipts and cash 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 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 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 cash 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, 2009, on the basis of accounting described in Note 1.

Gary, Bowers & Miller
May 5, 2010





TASFAA Financial Report

TASFAA - 2010 Annual Report

Texas Association of Student Financial Aid Administrators Statement of Cash Receipts and Cash Disbursements Fiscal Year Ended October 31, 2009

Balance as of November 1, 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 Deposit		<u>48,955</u>

Total Cash and Cash Equivalents as of November 1, 2008 \$ **155,247**

Cash Receipts

Membership Dues	\$	34,575
Fall Conferences Fees		130,364
Workshops, Spring Conference, Regional Rallies and other Income		45,873
Distribution from ING Investment Account		130,000
Investment Income		<u>688</u>

Total Cash Receipts \$ **341,500**

Cash Disbursements

Current Year Fall Conference Expenses	\$	151,886
Prior Year Fall Conference Expenses		166,868
Workshop, Training and Regional Rally Expense		29,808
Board of Directors Expenses		12,288
Fall Conference Committee		2,559
Communications Network		4,345
Regional Training Opportunities Committee		13,146
Other Committee & Training Expenses		2,918
Secretary's, Treasurer's and Assistant's Stipends		6,600
Past President, President and President-Elect Travel		8,708
President's Discretionary Fund		998
Scholarships		5,747
Other Expenses		<u>17,694</u>

Total Cash Disbursements \$ **423,565**

Cash Disbursements in Excess of Cash Receipts \$ (82,065)

Balance as of October 31, 2009

Plains Capital Bank Checking	\$	38,840
Plains Capital Bank Savings		897
Wells Fargo Bank Certificates of Deposit		15,000
Chase Bank Certificates of Deposits		<u>18,445</u>

Total Cash and Cash Equivalents as of October 31, 2009 \$ **73,182**

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



Texas Association of Student Financial Aid Administrators Notes to Statement of Cash Receipts and Cash Disbursements Fiscal Year Ended October 31, 2009

Note 1 - Summary of Significant Accounting Policies

Purposes

The Texas Association of Student Financial Aid Administrators (TASF~~AA~~) is organized for educational and research purposes of its membership and shall not be operated for profit. In furthering these general purposes, TASF~~AA~~ shall be dedicated to:

1. Encouraging qualified students to pursue a higher education and assisting them to obtain the financial aid they need to achieve this goal
2. The success of the students who pursue their higher education in Texas.
3. Promoting the effectiveness of the student financial aid programs in the post secondary institution of the state.
4. Uniting and facilitating communication among all persons, agencies, organizations and institutionsinvolved or interested in any phase of student financial aid administration in the state.
5. Sponsoring those activities and services, which will serve its members and society and provide them a means of exchanging and distributing professional information and ideas.
6. Promoting the professional development and competency of its members and others who support financial aid administration in the state.
7. Maintaining and improving professional standards in the field of student financial aid administration.
8. Stimulating creative and experimental activities in the financial aid field.

Basis of Accounting and Financial Statement Presentation

The Accounts of TASF~~AA~~ are maintained on a cash basis. Accordingly, certain revenues and the related asset accounts are recognized when received rather than when earned and certain expenses are recognized when paid rather than when

20 the obligation is incurred.



TASFAA Financial Report

TASFAA - 2010 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, 2008	\$	352,739
Interest and Dividends Earned		10,908
Fees Paid		(3,452)
Distributions		(130,000)
Unrealized Net Gains (Losses)		<u>22,761</u>
Ending Balance October 31, 2009	\$	252,956

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, 2009.

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, 2009, the balance at the brokerage house did not exceed this insured amount.



Texas Association of Student Financial Aid Administrators

***The TASFAA Annual Report
was created by
the Newsletter/Public
Relations Committee***