





President's Letter by Anne Walker

TASFAA Leadership



Dear TASFAA and Friends of TASFAA,

I want to extend my thanks and gratitude for electing me as your TASFAA President for 2015. I learned so much as President Elect under Melet Leafgreen,

and have appreciated Shannon Crossland's, your new President, guidance and wisdom. Keeping TASFAA effectively running, from board meetings, to training and committee work, is a huge undertaking. The success of TASFAA falls squarely on the shoulders of Texas' financial aid community.

As you read through the annual report, please note all the positive work being done by our committees. As much as I'd love to take responsibility and credit for all that great work, it really is how each person on each committee contributed. I cannot express enough how grateful and proud I am at all you've accomplished.

Finally, I want to ask one more thing of our community. Please continue to volunteer; one of the best things I've learned while serving this year is that TASFAA is only as strong as its membership. Thanks to each and every one of you who did any work for TASFAA. Whether you were on the Board, chaired a committee, or worked on a committee, you are what makes TASFAA Texas strong.

Again, thank you for allowing me the opportunity to work so closely with TASFAA for another year.

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Best Regards, Anne Walker Rice University



President Anne E. Walker, Rice University

Vice President Denise Welch, Panola College

President Elect Shannon L Crossland, Texas Tech University

Past President Melet Leafgreen, Texas Christian University

Treasurer Fabian Vasquez, Texas Tech University HSC

Secretary/Historian Devon Wiggins, Tyler Junior College

Board Members

Alan D. Ahmad, Alamo Community College Delisa Falks, Texas A&M University Cecelia K Jones, Wiley College
Christopher D. Murr, Texas State University Donnie Purvis, Weatherford College
Karen J Trail, Texas Woman's University
Ed Turney, University of North Texas



TASFAA Mission TASFAA Mission Statement

TASFAA is a professional organization with a diverse membership that works toward the ultimate goal of helping students gain necessary resources to promote access and choice in their pursuit of higher education opportunities.

Mission

The Association fosters commitment to these activities through initiatives collectively known as TASFAA's Preferred Future. These initiatives are: Training and Education; Technology; Outreach and Early Awareness; Partnerships; and Legislative.

Description

The Texas Association of Student Financial Aid Administrators (TASFAA) promotes the effectiveness of student financial aid programs in the post-secondary institutions of the state, facilitates communication among its members, sponsors activities in the financial aid field to promote the professional development and competency of its members.

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. Don't know if your TASFAA membership is current, find out - check your membership status here.

Volunteer Now! http://www.tasfaa.org/docs/forms/memVolunteer.html

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Archive Task Force

Melet Leafgreen - Texas Christian University, Chair **Denise Welch - Panola College Devon Wiggins - Tyler Junior College Cecelia Jones - Wiley College Carolyn Jones - Collin County Community College**

As TASFAA prepares for its 50th anniversary celebration in 2017, the Board became aware that the TASFAA Archives needed some updating and reorganizing. In the summer, we began talking about selecting a location to display some of the archive material permanently, where it could truly be appreciated by our membership and other higher education stakeholders in the state. The Texas Higher Education Coordinating Board seemed to be the perfect location, and Deputy Assistant Commissioner for Student Financial Aid Dr. Charles Puls graciously agreed to allow TASFAA to house our archives there as well as set up some display room in their facility.

TASFAA had an initial meeting with Dr. Puls at the TG headquarters in Round Rock (where TASFAA's archives have previously been housed) in July. In October, the day before the TASFAA conference began in Austin, a group of dedicated Board members spent all day going through every photo, every scrap of paper, and every artifact in the 48 year history of TASFAA. It was a fun and fascinating journey!

Coming up in 2016, the Task Force will request that members begin sending us any materials they have that should be included in our archives. We will also obtain references and financial estimates for digitizing the documents and photos in the archives.

We've made a great start on this important project, and look forward to having some wonderful materials to bring to the conference in October 2017 as we celebrate our 50th Anniversary together!



Awards & Scholarships

Sefra M. Lopez - Texas A&M University, Chair **Dede Gonzales - Texas State University Bridget Moore - Hardin-Simmons University** Chris Woodyard - University of Texas-Arlington **Demetrice Dent - University of Houston Casey Wells - Tyler Junior College** Angelika Williams - Texas State University Jael Garcia - University of Texas-Pan American

The Awards & Scholarship Committee awarded 10 scholarships in the amount of \$200 to assist with the cost of the New Aid Officers Workshop in May 2015.

In August, our committee solicited nominations for the Financial Aid Star, Trailblazer, and Hall of Fame awards. We received 2 nominations for the FAID Star award and selected John Sculley from Texas State University. Angela Parkoff of Texas A&M University was selected by the TASFAA Board to receive the Trailblazer award. The committee received 4 nominations for the TASFAA Hall of Fame and recommended Becky Wilson of Texas Tech University for the Unsung Hero of TASFAA and Earl Hudgins of Panhandle Plains Student Loan Center for the Service to TASFAA award.

All of the TASFAA service pins were mailed out at the beginning of November to individuals who did not attend the fall conference.

I will be working with Dede Gonzales, the new committee chair, to create an online application for the Mack C. Adams Scholarship for next year's submissions.

Years of Service Award Winners

50 Years of Service

Ronny Barnes

Panhandle-Plains Management & Service Corp.

St. Mary's University

40 Years of Service

Linda Gonzalez-Hensgen El Paso Community College David Krause

35 Years of Service

Yvonne Apodaca Jeffrey Ayers

E. Raedean Bolton Mickey Lewis Janie Miramontes David Schwartz Lyn Wheeler Kinyon El Paso Community College Panhandle-Plains Management & Service Corp. Texas Woman's University San Jacinto College Texas Higher Education Coordinating Board Texas A&M University **Baylor** University

Years of Service Award Winners (cont'd)

30 Years of Service

MarOuita Hackett Don Hilton Cathy Horn Jeanette Kucera George Torres Barbara Waters Becky Wilson Marcus Wilson

University of Texas - Tyler Ranger College Concordia University Texas Baylor University TG Southern Methodist University Texas Tech University Texas Tech University Health Sciences Center

25 Years of Service

Melissa Bassett Lisa Blazer, PhD Bonita Coleman Laurie Coulter Stan Eddy Michelle Enriquez Robin Famiglietti Keri Farrier Stacy Flood Paige Hendricks Carol Hicks Becky Johnson Sandra Jones Debra La Grone Debbie Mar Diana Martinez Cynthia Mayberry Patrick Reyna

Frank Sanchez Pamela Shuttlesworth Donna Story Cassandra Thomas Kathy Williams

20 Years of Service

Christine Bowman Karen Burnett Amy Carcanagues Lori Castillo Michael Chavez Eddie Davis Christine Gauger Dede Gonzales Sergio Gonzalez Charita Hampton Jennifer Herman Tricia Johnson Joel Juliot Mia Myers Melinda Oliver

First Marblehead Corporation University of Texas - San Antonio Lone Star College System Austin College Southern Methodist University Citizens Bank Sallie Mae Texas Woman's University Austin Community College **Edfinancial Services** University of Texas - El Paso Odessa College McLennan Community College Texas A&M University - Texarkana Texas Christian University University of Texas - San Antonio TG Baptist Health System School of Health Professions Texas A&M University - Kingsville DCCCD Stephen F. Austin State University Texas Southern University ELM Resources

Heather Beckles-Bright University of Texas Health Science Center at Houston Southwestern University Texas Tech University Health Sciences Center University of the Incarnate Word Texas A&M University Midland College Southwestern Assemblies of God University University of Texas - Austin Texas State University Sallie Mae University of Houston University of North Texas Wells Fargo Education Financial Services University of North Texas Texas Tech University Health Sciences Center **Baylor University**

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Celinda Sarabia Lea Sikora Samantha Stalnaker Belinda Suarez Renee Survan Carmen Tanner

15 Years of Service

Judy Adle Yomaira Arredondo Jeanne Ballard Sherie Banovic Kimberly Bomnskie **Billy Bossier** Gordon Brannon Susan Brown Griselda Castilla Yolanda Cleveland Rosemary Cooper Andres Cordero Jeannette Costello Judith Cunningham Linda Dawson Rachel Dixon Mary Dukes Donna Everson-Hampton Maria Faber Jacob Fraire James Gaeta Elsa Gaitan Molly Garrett Deborah George Dorothy Hampton Sylvia Hampton Jennifer Jones Melet Leafgreen David Longoria Elizabeth Lopez Cindy Luetzow Susan Marze Clorene McDonald Rosanna Mendiola H. Rachele' Nixon Garrett **Dolly Pierson** Minita Ramirez Yolanda Ramos DeCha Reid Marlene Ruffino Gail Schatte Lisa Schroeder Cynthia Scott-Treat Leslie Singleton May Steigman

Texas A&M International University University of Texas - Arlington Tarrant County College Texas A&M University - Corpus Christi SoFi (Social Finance, Inc) University of Texas - Dallas

Texas State University Dallas County Community College District Vernon College University of Houston University of Texas - Dallas University of Texas - Austin Southern Methodist University San Jacinto College University of Texas - Pan American University of Texas - Arlington University of Texas - Tyler TG Dallas County Community College District TG Texas A&M University - Commerce Lamar University Texas Woman's University University of Texas - Dallas El Paso Community College TG Southwestern University Trinity University Tyler Junior College University of Houston - Victoria University of Texas - Arlington Ranger College Texas Southern University Texas Christian University University of Texas - San Antonio Texas A&M International University Southern Methodist University Lamar University Wayland Baptist University University of Texas - San Antonio Stephen F. Austin State University Texas Christian University Texas A&M International University Midland College The CB Lone Star College System Texas Medical Association Lamar Institute of Technology Texas Woman's University Chamberlain College of Nursing University of Texas - Austin

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Sam Houston State University

El Paso Community College

Tyler Junior College

Texas State Technical College - Waco

University of Texas - Pan American

Stephen F. Austin State University

University of Texas - Arlington

Texas Southern University

Higher Education Servicing Corp/NTHEA

Years of Service Award Winners (cont'd)

Londa Sutton Harris Heather Thielemann Bianca Tidwell Robert Trevino Paulette Walker Brendan Walsh Casey Wells Jamie Willis Wanda Zeno

10 Years of Service

Sonia Adán-Medina Lydia Babbitt Paul Burke William Chandler Dell Cox Pearl Creviston **Beverly Fields** Sharon Finney Nathan Flory Veronica Gabbard Melissa Gandy Brenda Garcia Jael Garcia Juan Garcia Edia Hernandez Vicki House Diana Kinto Gabriela Leon Alina Longoria Iris Madrigal Melanie Martinez Gabriel Mendiola Janet Merten Stefany Mitchell Kevin Montgomery Joyce Myers Debbie Newhouse Paul Remmert Mary Rios Rachel Romero William Saenz Angela Speech Sheila Stedham Jennifer Steed Sharon Steele Crystal Thomas Christian Torres Kim Tran Thresa Tyus Yvonne Vera Breanda Williams Kay Wright Christy Young

Southwest Texas Junior College Southern Methodist University Financial Aid TV Southern Methodist University Amarillo College Central Texas College Frank Phillips College San Jacinto College University of Texas - San Antonio Houston Baptist University Sam Houston State University University of Texas - Pan American University of Texas - Pan American Texas A&M International University Midland College Hardin-Simmons University Lamar State College-Orange University of St. Thomas Lone Star College System University of Texas - Pan American Texas A&M International University University of Texas - San Antonio Amarillo College University of Houston - Downtown Higher Education Servicing Corp/NTHEA Howard Payne University Dallas Baptist University University of Texas - San Antonio Texas State University Galveston College Texas A&M University - Kingsville **Texas** College Lone Star College System Austin College Lee College Texas A&M University - Commerce Texas Southmost College University of Houston - Downtown TG San Jacinto College Dallas Christian College Brazosport College

Blinn College

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Constitution and Bylaws

Shannon Crossland - Texas Tech University, Chair Connie Brown – Texas Tech University Dede Gonzales – Texas State University Scott Lapinski – UNT Dallas Michael Patterson – Texas A&M University, Commerce

The Constitution and Bylaws Committee created a special section on the TASFAA website, located on the TASFAA Legislative Issues Committee page, to upload the TASFAA Position Papers for reference. The TASFAA Policies and Procedures manual was updated as necessitated for the needs of the Association.

Fall Conference

Scott Moore - University of Houston, Chair Taryn Anderson - University of Dallas, Co-Chair Chrisana Black - University of North Texas, Co-Chair Alan Pixley - Co-Chair Yolanda M Cleveland - University of Texas - Arlington **Demetrice Dent - University of Houston** Lety P Gallegos - University of Houston Jael E. Garcia - University of Texas - Pan American Molly M Garrett - Tyler Junior College Sergio Gonzalez - Sallie Mae **Charita Hampton - University of Houston Donna King - Grayson County College** Raul H Lerma - El Paso Community College Marisela O Maldonado - Rice University Amanda L Smith - Clarendon College Kay M Wright - Brazosport College

This year, the Texas financial aid community gathered in Austin for its annual conference. 367 were in attendance this year, nearly a 40% increase in attendance over 2014. In lieu of the attendance issues and unique challenges of the 2014 conference in El Paso, the committee decided not to increase registration fees and concentrate on creating an engaging conference that would capitalize on creating more information and greater networking opportunities. The committee changed the way information was offered to participants. Opting for "track themed" sessions that would target school types (two-year, fouryear, etc.) and experience (beginner, intermediate, advanced). In addition, for the first time in many years, the committee opted not to offer every session in the traditional hour and fifteen minute time slot. Time slots varied from 45 minutes, 60 minutes to the 75 minute sessions.

The theme of the conference was "On Track for Success", playing off the various session "tracks" which were offered. Sessions by Jim Briggs, the Tax Detective, TASFAA 2015 president Anne Walker (who did three!),

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Fall Conference (cont'd)

Megan McClean (NASFAA) and Rick Renshaw (DOE) were all popular. President Anne Walker opened up the conference with a warm welcome and Shannon Folliwell closed it with great anticipation for the 2016 Conference. Through the generosity of the TASFAA Community, we were able to raise \$652 for the Austin Jazz Workshop. The Jazz Workshop also provided excellent ambient entertainment for the President's reception. In addition, 27 runners woke up before dawn to complete the Mac Adams Fun Run and raise \$570.

The committee felt the conference was a great success. Both in terms of attendance and of satisfaction rated by polling. Of those in attendance, 99% reported "Good" or "Excellent" satisfaction with the conference. We would like to thank all of the presenters who did such a great job in sharing information and the board of TASFAA who was supportive throughout the process. In addition, I would personally like to thank Anne Walker, for being a great leader and always supportive. Also, the committee for their tireless work both prior to the event and during the event, they really made this happen by pulling together and meeting some tough challenges head on. With the organizational, hard-working, visionary talents of both Taryn Anderson and Chrisana Black as Chairs for the next conference, TASFAA will only build on the success of the 2016 conference.

We look forward with great anticipation to 2016 and will see everyone in Frisco.

Legislative Issues

Christopher D. Murr - Texas State University, Chair Linda Ballard - Texas Southern University Shannon Crossland-Followill - Texas Tech University James Hubener - Dallas County Community College Michael Patterson - Texas A&M University - Commerce George Torres - Texas Guaranteed Student Loan Corporation

Committee Activity:

- Drafted a letter of support for the B-On-Time Loan Program, which was submitted to the Office of Senator Zaffirini.
- Submitted a letter to the Texas Higher Education Strategic Planning Committee outlining the *TASFAA Recommendations for Increasing Financial Literacy and Responsible Student Loan Borrowing.*
- Revised the TASFAA Position Paper on State Higher Education Financial Aid Programs and submitted it to key legislative staff.
- Revised the TASFAA Position Paper on Federal Higher Education Financial Aid Programs.
- Continued to send legislative alerts to members via the TASFAA listserv.

Pending Activity:

- Conduct an annual re-prioritization of committee goals.
- Begin development of a survey to assess the membership's concerns regarding future legislative issues.



<u>Membership</u>

Donnie Purvis - Weatherford College, Chair Amy Ahlas - Alamo CCD, Co-Chair Melet Leafgreen - University of Texas - Arlington Anne E. Walker - Rice University

This past year we made a lot of changes in the membership drive.

- 1. We cleaned up the membership by asking the two year institutions to update their staff in the database.
- We focused on getting members to renew their membership. We were only 3 members short of our budget.
- 3. We had a much better turnout for voting this past year we believe due to the memberships being done sooner.

Our next project: We will focus on the four year schools this coming year to getting their staff roster updated and as current as possible.

Side note: Kaplan College has merged into one institution now. They were previously paying 5 separate memberships. The same for TSTC. It's all under one OPEID number now. So, this is affecting our budgets for membership. We had already anticipated this for 15-16. I do believe had we not been in contact with the membership, we would have been caught off guard on this resulting in a short fall on the budget side.

Membership by Type		
Public (2 year)	623	
Public (4 year)	772	
Independent (2 year)	0	
Independent (4 year)	277	
Proprietary	25	
Health Related/Nursing	15	
Graduate/Professional	32	
Consultant	15	
Government Agency	20	
Guaranty Agency	41	
Lender	28	
Secondary Market	4	
Servicer	28	
Other	12	
Not specified	6	
Active membership	168	
Membership did not renew	3	

Nominations & Elections

Melet Leafgreen - Texas Christian University, Chair Bridgette Ingram - Texas A&M University Stephanie Lopez - Texas State University

We began requesting nominations in March of 2015. This year, we asked nominators to identify why they nominated each individual for office - how long they had known their nominees, how have the nominees served TASFAA, and what strengths and experiences nominees brought to the table. We had excellent participation and received 15 nominations. In turn, we required each candidate to provide a Statement of Candidacy and a resume. In April our committee submitted nominee information to the Board for review. For the first time in several years, we had a whopping 8 candidates for the 4 open Board positions.

On July 1st we sent a "preview" email and encouraged all members to check out the list of candidates and their profiles. A reminder went out on July 24th that the election would open July 31st. Actual voting invitations went out to 137 voting members on July 31st. As of August 12th, 54 of those schools had voted. I asked each of our TASFAA Board members to call 6-7 schools each that week. By August 17th, the number of schools who had voted had climbed to 80 – that's 58% participation!

Elections closed on August 17th, and the following results were sent to President Anne Walker:

President-Elect

Alan Ahmad, Alamo Community College District

Board Members

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Eric Cooper, Texas A&M University at Kingsville Carolyn Jones, Collin County Community College Raul Lerma, El Paso Community College Donnie Purvis, Weatherford College

We are proud of this committee's work this year, and are so grateful for everyone's participation.



<u>Regional Training</u>

Heather Fountain - Texas A&M, Chair Melissa Bohnsack - Texas A&M Angela Parkoff - Texas A&M Erin Porter - Texas A&M

TASFAA Regional Training in partnership with Texas Guarantee Agency and Texas Higher Education Coordinating Board (THECB) conducted the FY 15 regional training. We welcomed new presenters from THECB and adjusted out training locations and methods this year. We continue to work as a team to find ways to better serve our financial aid community by providing the best training experience at no expense.

This year was definitely a year to remember for the Regional Training Committee. Early on in planning, I became pregnant with twins and was informed I would need to keep travel to a minimum. Luckily, I was able to rely on three of my colleagues, Melissa Bohnsack, Angela Parkoff, and Erin Porter, to assist with conducting these presentations on my behalf. In addition, weather played a major role in the ability for some of our presenters to make it to certain locations.

This year's topics included a NASFAA CORE module: Need Analysis, enrollment reporting, contacting delinquent borrowers, federal and state updates. In addition, we conducted group discussions regarding R2T4 calculations, verification, and 150% subsidized loan limit.

Training was held at 7 sites that included: Houston (2), Dallas/Ft. Worth (2), El Paso. Lubbock, and Austin. The decision was made to move the previous San Antonio site to Austin this year. By providing the training in Austin, we were able to broadcast the training live as well as record it for future watching. This allowed our committee to provide training to those that could not make the trip to one of our locations. Weather prohibited our TASFAA presenters from making it to El Paso. The recordings that were made in Austin proved handy as we were able to show these in El Paso for the presenters that could not make it to that location.

Number of attendees per site as follows:

Location Name	Event City	Event Total # Attended
Eastfield College - Dallas CCC	Mesquite	104
Tarrant County College Trinity River Campus	Fort Worth	55
Lone Star College - North Harris	Houston	69
Houston Community College Southeast Learning Hub	Houston	58
Texas Higher Education Coordinating Board also live stream/recording	Austin	74
El Paso Community College	El Paso	39
Lubbock Christian University	Lubbock	85

Breakfast and lunch were provided to training attendees. Food costs were split with TG. TASFAA's food costs totaled \$4833.15. To save costs going forward, we will alter the agenda to start training later in the morning which will allow us to eliminate the need for breakfast.

Overall, the training locations were a success. Moving the training to Austin and being able to record it was a huge win for us. We will continue to do this going forward as we feel this opens up training for numerous TASFAA members. The cost for three TASFAA training committee members was approximately \$2750, which included hotel, flights, and meals.

I would like to express my thanks to Melissa, Angela, and Erin for stepping in when needed. They assistance and input was invaluable throughout this process. I'd also like to thank Texas Guarantee and the Texas Higher Education Coordinating Board for their willingness to present and contribute to these trainings as well. They are a pleasure to work with and I look forward to working with them again in FY 16.

Training

Tierra Graves - Texas A&M University, Chair Consuela Mitchell - Tarrant County College District Melissa Mallett Bohnsack - Texas A&M University Angela Parkoff - Texas A&M University Roy Tuberville - El Paso Community College Russell Jeffrey - Concordia University William Mack - The University of Texas at Dallas Yolanda Cleveland - The University of Texas at Arlington Robert Gaertner - Blinn College Lauren Miller - Texas Woman's University Phillip Wambsganss - NTHEA/HESC Kevin Montgomery - NTHEA/HESC Karen Trail - Texas Woman's University Brandy Gilliam - Texas Woman's University

On October 7th-8th the Training Committee traveled to El Paso, Texas to train new financial aid professionals for the 2014 ABC Conference. The workshop took place at the El Paso Camino Real Hotel and Convention Center. The Training Committee presented on the basics of Financial Aid, including the application process, student eligibility, loans, Pell and campus based programs, verification, satisfactory academic progress and professional judgement.

Shortly after the ABC Conference, the Training Committee gained a new Chair. With the transition of new leadership, we experienced a few challenges. The Training Committee had to find a new location for the New Aid Officers Workshop. After calling and researching new venues, we were able to secure the Hilton in Arlington. In order to reduce costs, we signed a contract for two years. Despite the challenge of securing a new location in a short time span, the New Aid Officers Workshop was a complete success.

The Training Committee welcomed 74 guests from all of the State of Texas to the New Aid Officers Workshop. Our goal was to have a well-balanced workshop with a mix of presentations and hands on activities. Throughout the workshop, we wanted participants to get to know one another and build a network amongst each other. To do this, we included several opportunities for the larger group to break down into smaller groups. We also had a business card swap activity and a reflection activity. Throughout the workshop the Training Committee presented on the application process, need analysis and professional judgement with case studies, TASFA, packaging and satisfactory academic progress. We welcomed the Department of Education back to present on Pell grant, campus based programs and R2T4. The Higher Education Coordinating Board presented on state programs and updates and TG joined us to speak about "The Ins and Outs of loan repayment." They also hosted the infamous "Show What You Know" game.

During the workshop, we invited the TASFAA Board to have dinner with us. The Fun/Activity Committee, which is a subcommittee of TASFAA, created financial aid specific games to play with the attendees and Board members. All in all, after the workshop we left as a family. Friendships, networks and relationships were built while learning the tools to be a successful financial aid administrator. The Training Committee will have a new Chair for 2015 ABC Conference and 2016 NAOW. It was a joy, honor and learning experience to serve as the Chair of the TASFAA Training Committee.









