



2018 TASFAA Annual Report

TASFAA Leadership

President's Letter

by Christopher D. Murr, Ph.D.

Dear TASFAA,

Thank you for the honor of allowing me to serve as TASFAA president this past year. It has been a privilege to be the executive officer of such a dynamic and vibrant organization. Our Association's dynamism and level of activity is made possible only by the many volunteers who give of their time, talent, enthusiasm, and creativity to TASFAA, which enables us to continue better meeting the needs of our members. I am so grateful to our volunteers.

Over the last year, much has been accomplished on behalf of our members. These objectives, set forth at the beginning of my term, have been the result of deliberate and collaborative efforts among the TASFAA Board of Directors, committee and task force chairs, committee and task force members, and others. Much of this work is contained within this annual report, however, I would like to highlight a few of our accomplishments.

Examples of TASFAA's Accomplishments This Past Year

1. Developed and implemented a member-driven, multi-year strategic plan.
2. Testified on Senate Bill 887 before the Texas Senate Committee on Higher Education (see written [portion of testimony](#)).
3. Began offering NASFAA Credential Training opportunities to our members (based on the recommendation of Christy Miller, Chair of the NASFAA Credentialing Training Task Force).
4. Enhanced our recognition of the work and contributions of TASFAA members by creating the *Teaching and Mentoring Award* and the *Financial Aid Support Award* (based on the recommendation of Dede Gonzales, Chair of the Awards and Scholarships Committee).
5. Adopted enhancements to the Association's investment policy that are in alignment with the fiscal goals of our new strategic plan (based on the recommendation of Delisa Falks, Chair of the Investment Policy Task Force).
6. Adopted an *Appropriate Behavior and Non-Discrimination* statement that is aligned with similar language adopted by our national association and that better sets expectations for appropriate behavior at TASFAA events.
7. Announced the new ATLE-TASFAA Education Scholarship for TASFAA members, the endowment for which was made possible by the generosity of the Association of Texas Leaders for Education—ATLE (Thanks to Debra Urias, President of ATLE, and the ATLE Board of Directors. Also, thanks to David Orsag, board member, and Dede Gonzales, committee chair, for their work on establishing selection criteria, process timeline, etc.).

Though the above are just some examples of the objectives accomplished over the past year by the TASFAA Board, committee chairs, task force chairs and other volunteers, they are illustrative of the variety and types of work that have been performed on your behalf. I want to express my sincere appreciation to all of the TASFAA volunteers. You do an amazing job for a wonderful association. I also would like to congratulate Delisa Falks on her new role as TASFAA president. We are very fortunate to have Delisa at the helm of our Association.

If you have not yet taken the opportunity to volunteer and want to develop both personally and professionally while contributing to TASFAA's growing success, then consider becoming a TASFAA volunteer.



Officers 2017-18

President

Christopher D. Murr, Ph.D., Texas State University

Vice President

Taryn L Anderson, University of Dallas

President Elect

Delisa Falks, Texas A&M University

Past President

Alan D. Ahmad, Alamo Colleges District

Treasurer

Fabian Vasquez, Texas Tech University Health Sciences Center

Secretary/Historian

Tracie N Hunter, Lone Star College System

Board Members

Jael E. Perez, University of Texas - Rio Grande Valley

Diane Todd Sprague, University of Texas - Austin

Lyn W Kinyon, University of Texas - Arlington

Cecelia K Jones, Jarvis Christian College

Jeannie Gage, Texas A&M University - Corpus Christi

Taryn L Anderson, University of Dallas

Robert Merino, San Jacinto College

David Orsag, University of Mary Hardin-Baylor



TASFAA Mission & Vision

TASFAA Mission & Vision Statements

TASFAA Mission Statement

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

TASFAA Vision Statement

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



TASFAA Committee Reports

Awards & Scholarships Committee

Dede Gonzales – Texas State University, Chair
Carolyn Mallory – University of Houston – Victoria
Kartia Coffey – Houston Baptist University
Nedra Goodrich – Texas Tech University
Denise Welch – Panola College
Zarita Barton – Lone Star College North Harris

Accomplishments of the Awards and Scholarships Committee for 2017-2018

- Reviewed applications and awarded 6 Mack C. Adams scholarships for the New Aid Officers Workshop in May 2018
- Reviewed applications and awarded 6 Mack C. Adams scholarships for the ABC Workshop in October 2018
- Suggested and received Board approval for two new award categories
 - Financial Aid Support Award – which recognizes a member in a back office support role in a financial aid office at a member school.
 - Teaching and Mentoring Award – which recognizes a member who has demonstrated a commitment to teaching and mentoring other financial aid professionals over a sustained period of time.
- Solicited nominations for the TASFAA Awards
 - Selected Joshua Lowry – San Jacinto Community College District for the Financial Aid Star Award
 - Selected Courtney Todd – Texas State University for the Financial Aid Support Award
 - Selected Shannon Crossland – Texas Tech University for the Teaching & Mentoring Award
 - TASFAA Board selected Rachael Fournier – University of Texas at Arlington for the TASFAA Trailblazer award
- Ordered plaques for all award recipients and the President's plaque
- Determined the 2018 service pin recipients. Pins were given out at the fall conference for those in attendance. Remaining pins were mailed in October.

Years of Service Pin Recipients

45 Years of Service

Judy Schneider Financial Aid Services (FAS)

40 Years of Service

Enrique Garcia Texas A&M University - Corpus Christi
Jackie Adler Texas State Technical College
Guadalupe Valdez Texas A&M University- San Antonio

35 Years of Service

Sandi Abshier Texas State Technical College
William Mack University of Texas - Dallas

Sherry Reinwald
Kathy Wright

Southern Methodist University
Tarleton State University

30 Years of Service

Hilda Pena
Becky Wilson
Ron Brown
Imelda Buentello
Rose Carreon-Munoz
Jill Hanna
Jill Jensen-Brye
Elvia Leija
Alexzine Lewis
Donnie Purvis

University of Texas - El Paso
Lubbock Christian University
University of Mary Hardin-Baylor
Austin Community College
Alamo Colleges District
Wells Fargo Education Financial Services
St. Mary's University
Alamo Colleges District
Commerce Bancshares, Inc.
Weatherford College

TASFAA Committee Reports

Years of Service Pin Recipients (cont'd)

Valerie Quay
Thomas Ratliff
Catherine Sanchez

Michael Scott
Pam Siegrist
Denise Simpson
Trina Smith-Patterson
Elizabeth Soles
Kim Thomas

St. Edward's University
Abilene Christian University
University of North Texas Health
Science Center at Fort Worth
Texas Christian University
Concordia University Texas
Del Mar College
Tarrant County College
Houston Community College System
Cognition Financial

Lear Hickman
Barbara Hudson
Tracie Hunter
Gail Hutson
Vicki Jacobs
Rhonda Lancaster
Patty Landeros
Rick Lasly
Debbie Malone
Gabriela Martinez
Brenda McCafferty

University of Houston
Dallas Baptist University
Lone Star College System
Amarillo College
Wharton County Junior College
Baylor University
Wayland Baptist University
Angelo State University
LeTourneau University
University of Houston - Downtown
Educational Credit Management
Corporation
Paul Quinn College
Dallas County Community College District
Angelina College
Southwestern Assemblies of God
University
University of North Texas at Dallas
Texas Tech University
University of Texas - Austin
El Paso Community College
Dallas County Community College District
Texas Southern University
University of Texas - El Paso
LeTourneau University
Texas A&M University
Sam Houston State University
Howard College

25 Years of Service

Zena Williams
Glenn Chance
Melissa Martinez
Mary Bledsoe
Gladys Chairez
Elizabeth Daniel

Sarah Dorsey
Beth Erickson

LaTasha Goudeau
Gayla Jeffery
Kristi Kirk
Elsa Lopez
Ines Lopez
Silvia Peña
Debra Robertson
Carrie Shiffman
Ed Turney
Norma Urias
Leah Williams
Sharon Wright

Houston Community College System
College Ave Student Loans
Project GRAD Houston
Tarrant County College
University of Texas - El Paso
Great Lakes Educational Loan
Services, Inc
University of Texas - Dallas
Great Lakes Educational Loan
Services, Inc
University of Houston - Downtown
Paris Junior College
Concordia University Texas
El Paso Community College
El Paso Community College
University of Texas - El Paso
Texas A&M University
University of Texas - Austin
University of North Texas
El Paso Community College
Texas State Technical College
Sam Houston State University

Dana Mingo
Tammy Minton
Irma Montoya
Sue Myers

Beatrice Perez
Beverly Pinson
Allison Radke
Eric Shoppach
Isabela Shores
Sharon Thibodeaux
Sandra Vasquez
Tracy Watkins
Donna Watson
Angela Whitlock
Jodie Wright

15 Years of Service

DeRodrick Jonkins
Paul Negrete
Kimberly Adams
Joe Apodaca
John Buck
Monica Comeaux
Marcus Cooper
Cecilia Corpus
Ana De La Garza
Joel Depue
Jason Edens
Brenda Farr
Adriana Garza-Romance
Penny Griffin
Keith Hoelscher
Melissa Jones
Hayley Jordan

Houston Community College System
Rice University
Texas Woman's University
Trellis Company
Rice University
University of Houston - Downtown
Texas A&M University
University of Texas - El Paso
Texas Southmost College
Parker University
Austin Community College
Lubbock Christian University
University of Texas - Austin
Southern Methodist University
Angelo State University
Jarvis Christian College
Austin College

20 Years of Service

Mike Sitka
Cristen Alicea
Kevin Armalay
Jason Briseno
Mike Burke
Cheryl Cagle
Rebecca Cano
Ron Crumedy
Laura Elizondo
Lisa Goodwin

Texas Tech University
University of the Incarnate Word
University of Texas - Austin
Austin Community College
Blinn College
Trinity University
South Texas College
Galveston College
Texas A&M International University
University of North Texas

TASFAA Committee Reports

Years of Service Pin Recipients (cont'd)

Linda Kuhn	Austin Community College
Jennifer Lozano-Lowe	University of Texas at San Antonio
Willow Lucas	Dallas County Community College District
Latisha Marion	Austin Community College
Anita Martinez	Midland College
Bridget Moore	Hardin-Simmons University
Meghann Nash	Galveston College
Angela Oubda	Austin Community College
Gina Salinas	Texas Southmost College
Denise Sanchez	Texas A&M University- San Antonio
Billy Satterfield	University of Houston - Clear Lake
Mark Shura	Cognition Financial
Jackie Stevens	Parker University
Stacey Tieu	Tarrant County College
Humberto Trinidad	University of Texas at San Antonio
Sean View	Parker University
Eloisa Ybarra	University of Texas - Rio Grande Valley

10 Years of Service

Amber Schmid	Collin County Community College
LaToyka Osborne	Southwestern University
Gaston Aguirre-Martinez	El Paso Community College
Tacey Anderson	Rice University
Rex Ashby	Texas A&M University - Kingsville
Christan Babcock	Western Governors University
Theresa Barrera	St. Mary's University
Christopher Baur	Lamar University
Rebecca Bradley	Texas State University
Kasi Broussard	Panola College
Cemondria Bush	Dallas County Community College District
Jill Cagle	Dallas Baptist University
Maria Calderon	Prairie View A&M University
Daniel Campos	University of Texas at San Antonio
Erma Carter-Auzenne	Tarrant County College
Ana Chavez	Collin County Community College
Patricia Collins	Sam Houston State University
Brenda Cook	University of Houston
Rachel Dunn	Tarrant County College
Denise Elisario	Texas State Technical College
Elizabeth Estrada	El Paso Community College
Terry Fernandez	Southwest Texas Junior College
Robert Fishkind	Texas Woman's University
Linda Foster	Midwestern State University
John Foxworthy	University of Texas - Dallas
Courtney Frost	Austin Community College
Camille Garcia	University of Texas - San Antonio
	Health Science Center



Joshua Hernandez	Texas Tech University
Tina Holzer	Blinn College
Kasiah Johnson	Lone Star College System
Tracy Jones	Lone Star College System
Nick Kilmer	Texas A&M University
Donna King	Grayson County College
Zachary Krueger	University of Mary Hardin-Baylor
Shelby Lowrey	Paris Junior College
Kristal Luna	Sam Houston State University
Cynthia Martinez	Southwest Texas Junior College
Elida Martinez	El Paso Community College
Katie Martinez	St. Edward's University
Sophia McGee	Houston Community College System
Elizabeth Mechalske	Texas Christian University
Joshua Menefee	San Jacinto College
Heather Miller	University of the Incarnate Word
Tammy Mitchum	Stephen F. Austin State University
Angela Molina	Tarrant County College
Eduardo Nerio	University of Texas - Austin

TASFAA Committee Reports

Years of Service Pin Recipients (cont'd)

Jennifer Obenhaus	Texas State University	Angelia Spencer	Frank Phillips College
Kim Patterson	Prairie View A&M University	Gladue Tafolla	Southwest Texas Junior College
Braunshay Pertile	Southern Methodist University	Jessica Tomlinson	Brazosport College
Lorena Pescador	El Paso Community College	Kim Tran	University of Houston - Downtown
Janette Rios	Brightwood College - McAllen	Vicky Tran	Dallas County Community College District
Irene Rodriguez	South Texas College	Joshua Trevino	University of Houston - Clear Lake
Luis Rodriguez	Texas A&M University	Daniel Vasquez	El Paso Community College
Lynn Scales	Lamar State College-Orange	Dahlia Velarde	West Coast University
Froylan Silva	Texas A&M University	Sarah Webb	University of Texas at San Antonio
T'Juanna Simmons	Dallas County Community College District	Stephani White	Dallas County Community College District
Amanda Smith	Clarendon College	Caleb Willis	Navarro College
Jennifer Smith	Paris Junior College	Erika Zuniga	El Paso Community College

Communications & Social Media Committee

Allison Abernathy - Texas State University, Chair
Alan D Ahmad - Alamo Colleges District, Board Liaison
Amy Downey - University of Texas
Julie Wittmis - Texas Woman's University

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

TASFAA Star (cumulative totals)

Subscribers	481
Posts	75
Hits	20730
Pages/Views	8074
Unique Visitors	3438
Hits per Unique Visitor	6.03
Pages per Unique Visitor	2.35

TASFAA LinkedIn

Members	114
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TASFAA Committee Reports

Constitution and Bylaws Committee

Toni Bryant - Texas State University, Chair

Lyn Kinyon Wheeler - University of Texas - Arlington, Board Liaison

Nora Cargo - Texas A&M University

Mildred Martinez - Paul Quinn College

Rebekah Sepulveda - University of Texas - Rio Grande Valley

Diane Todd Sprague - University of Texas - Austin

The TASFAA Policies and Procedures manual was updated as necessary for the needs of the Association.

Early Awareness Committee

Elizabeth Mechalske - Texas Christian University, Chair

Linda Ballard - Texas Southern University

Michelle Enriquez - Citizens Bank

Melissa Jones - Temple College

Debra Urias - Brazos Group

Dustin Zimmerman - Not Specified

Committee Activity

- Worked to facilitate a positive, cooperative relationship between the Association and Texas middle schools and high schools via the providing of financial aid information.
- Worked to coordinate annual trainings in all regions of the state.



TASFAA Committee Reports

Fall Conference Committee

Jael Perez - University of Texas - Rio Grande Valley, Co-Chair, Board Liaison
Christina Pikla - Trinity University, Co-Chair
Nora Cargo - Texas A&M University, Vice Chair
Zarita Barton - Lone Star College System
Joy Dailey - Texas Southern University
Christine Gauger - University of Texas - Austin
Sergio Gonzalez - Sallie Mae
Alberto Hernandez - Texas A&M University - Corpus Christi
Yvette Hernandez - Southwest Texas Junior College
Kevin Hodge - Lone Star College System
Jessie Jackson - Paul Quinn College
Marisela Maldonado - Rice University
Robert Merino - San Jacinto College



The 2018 TASFAA conference took place October 3-5 at the Moody Gardens Hotel and Convention Center in Galveston, Texas. The conference theme, “It’s Island Time,” embraced the tropical location. For the first time ever, two National Association of Student Financial Aid Administrators (NASFAA) credentials—Need Analysis and Verification—were offered as pre-conference sessions. A total of 373 members registered, which includes 25 exhibitors. The conference began with lunch and a motivational key note address from Dave Davlin on making it count. Below is a synopsis of the various aspects of the fall conferences:

Conference Agenda

- There were 32 interest sessions offered that covered best practices, communication, compliance, customer service, financial literacy, leadership, nuts and bolts, professional development, research, resources, and student success

General Sessions

- *NASFAA Federal Update*, presented by Stephen Payne, Assistant Director of Federal Relations at NASFAA
- *Federal Student Aid (FSA) Update*, presented by Rick Renshaw, FSA Training Officer, U.S. Department of Education (DOE) Dallas Regional Office
- *Texas Legislative Update*, presented by Charles (Chad) Wilder Puls, Deputy Assistant Commissioner for Student Financial Aid Programs at the Texas Higher Education Coordinating Board (THECB)

TASFAA Committee Reports

Fall Conference Committee (cont'd)

Community Service

- TASFAA supported the Children's Center of Galveston, a nonprofit organization that works to improve the lives and outcomes of at-risk children in the Galveston area. A total of \$1,814 was donated to the Children's Center from raffle ticket proceeds, as well as needed items such as duffle bags and sheets.

Conference Events

- *TASFAA Awards Reception*: every year, TASFAA honors members who have reached milestones for years of service as well as the TASFAA Trailblazer, TASFAA Star, and TASFAA Hall of Fame. Two new awards were presented this year:
 - Financial Aid Support Award – Recognizes outstanding efforts in a back-office support role
 - Teaching and Mentoring Award – Recognizes commitment to teaching and mentoring other FAA professionals
- *Mack C. Adams 5K Run/Walk*: 26 people participated in the 5K which took place on the Moody Gardens grounds. A total of \$1,080 was raised to support the Mack C. Adams Professional Development Scholarship.
- *Thursday Night Dinner and Entertainment*: conference attendees embraced the theme by dressing in their best island attire. The Slags, a local band, provided the evening's entertainment.

A post conference survey will be sent to the TASFAA membership. Feedback received will assist the 2019 conference chair, Nora Cargo, and the conference committee in crafting the 2019 conference which will take place October 9-11 at the Ft. Worth Hilton.

Finance Committee

Christopher D. Murr, Ph.D. (chair) – Texas State University

Delisa Falks (vice-chair) – Texas A&M University

Alan D. Ahmad – Alamo Colleges District

Fabian Vasquez – Texas Tech University Health Sciences Center

Committee Activity

- Developed the key performance indicators for the fiscal strategic goal of TASFAA's new multi-year strategic plan.
- Worked with the Chair of the Investment Policy Task Force to help facilitate the achievement of the task force's charge.
- Reviewed appropriate operating balances with the TASFAA accountant and within the context of the new investment policy.
- Reviewed operating budget and related revenues/expenses on a quarterly basis.
- Reviewed bank and investment statements on a quarterly basis.

TASFAA Committee Reports

Legislative Issues Committee

Diane Todd Sprague - University of Texas - Austin, Chair
Cynthia Butler - Dallas County Community College District
Shannon Crossland - Texas Tech University
Zelma DeLeon - University of North Texas
Joshua Hernandez - Texas Tech University
Carolyn Jones - Collin County Community College
Jimmy Parker - Panhandle-Plains Management & Service Corp.
Alan Pixley - Collin County Community College

The Legislative Issues Committee had a very active year. The first activity the committee completed was a survey of the membership asking about knowledge and comfort levels with the State legislative process. The results of this survey were as follows:

1. Comfort with the legislative process-68% answered somewhat or neutral
Know ledge of legislative timeline-77% answered moderately or slightly
2. Level of understanding of legal terms-81% answered average or below
3. How important is training on legislative issues-63% answered that this was extremely or very important
4. Level of understanding of legal terms-81% answered average or below
5. How important is training on legislative issues-63% answered that this was extremely or very important

In the comment section, people answered that they were concerned about/wanted to know about Reauthorization, CDR risk sharing, year round Pell, Cal certification streamlining, FADS reporting, and timing of State allocations.

This was followed by another survey to the membership on their specific concerns relative to financial aid issues in the upcoming legislative cycle. The result for this survey were as follows:

1. What is your concern level with the concept of risk sharing that could require institutions to pay a fee based on their CDR rates? – 46.6% were extremely concerned and 43.3% were somewhat concerned
2. Rate your awareness of HR 4508, The Prosper Act, which was passed out of the House Education and the Workforce Committee in December 2017.-25.8% were very to extremely knowledgeable and 38.7% were moderately knowledgeable
3. What is your concern level with HR4508, The Prosper Act, provisions to dramatically change the CDR rate calculation to a Programmatic Repayment Rate by computing a repayment rate for each program on campus?-36.8% were extremely concerned and 46.7% were somewhat concerned
4. What is your concern level with Congress reviewing a one grant, one loan, and one work study program concept?-30% were extremely concerned and 43.3 were somewhat concerned
5. How important is the ability of financial aid officers to limit the amount of loans to borrowers to help prevent over-borrowing? – 38.7% extremely important and 51.6% somewhat important
6. What items do you believe are most important to address concerning reauthorization of the Higher Education Act?
7. What items do you believe are most important to address concerning reauthorization of the Higher Education Act? – the overarching responses revolved around the complexity of R2T4, required disbursement of aid weekly or monthly, Work-study allocation changes, one grant one loan proposals,

TASFAA Committee Reports

Legislative Issues Committee (cont'd)

risk sharing with CDR calculated by repayment rates, gainful employment, annual loan counseling, elimination of Grad Plus, and the unraveling of regulation and oversight.

8. List your thoughts on simplifying the FAFSA.
– simplification is welcome, use of imported tax transcripts would be very useful, there are concern with how simplification would impact equity or the need for a third party application and removing the requirements that are tied to the FAFSA.
9. Should TASFAA weigh in on the state's discussions of student loan indebtedness? -93% said yes
10. How concerned are you regarding the possible repeal of state tuition set aside? 47.8% were extremely concerned and 30.4% were somewhat concerned
11. How strongly would the repeal of state tuition set aside impact your student population? – 54.5% said there would be an extreme impact on their students and 18.1% said the impact would be somewhat extreme
12. Are there other items you believe are important to address concerning the upcoming State Legislative session? The requirements related to off-campus State work-study, the impact and logistics of the newly required debt letter under SB 887, FAD reporting, funding for undocumented students and the late allocation of State program funding.



Many thanks go to Cynthia Butler for spear heading both of these survey initiatives. Based on these responses Jimmy Parker kindly gathered a wealth of information including items such as the State legislative calendar, a glossary of terms, and how a bill is introduced and passed. These items were posted on the TASFAA web site under the Legislative Committee area and will be migrated to the quick link with the prior year position papers for easier access for the membership.

Under the leadership of Alan Pixley, the committee sponsored a session at the Fall TASFAA conference related to the State legislative process and how TASFAA members could interact with their institutional leadership and government relations colleagues, as well as State legislators.

The one task that is still outstanding is the development of a position paper for TASFAA for the upcoming legislative session. Delisa Falks, the new TASFAA President will be working with Zelma DeLeon and Alan Pixley, the new Legislative Issues co-chairs to develop this piece.

TASFAA Committee Reports

Membership Committee

Donnie Purvis - Weatherford College, Chair
Robert Merino - San Jacinto College, Board Liaison
Ana Chavez - Collin County Community College
Theresa Decker - Alamo Colleges District
Jason Edens - Austin Community College
Keith Hoelscher - Angelo State University
Jonathan Miles - Not Specified

Committee Activity (events, statistics, meetings, etc.):
154 memberships paid so far. Budget is for 156 memberships or \$39,000.

We came in short of our budget by two institutions. Committee did have an active outreach program and made efforts to assist the institutions that did not renew. The ones that are not renewing are either private or proprietary schools.

Mentor/Protege Taskforce Committee

Juliana Davis - Texas State University, Chair
Shannon Crossland
Sheree Smiling
Carla Dixon
Beverly ReeserMichelle Flores

Objective: To support our TASFAA membership by pairing new financial aid professionals with veterans of 5 or more years of experience in financial aid. These mentors would encourage and motivate these new professionals to seek more training and become involved with committees and events, as well as support proteges in their current positions by serving as a “voice of experience” in this industry.

Proteges – Allison Abernathy (Texas State University), Andrew Garza (Del Mar College), Patricia Greene (Prairie View A & M), Lucas Martinez-Salas (UT Rio Grande), Melissa Jones (Temple College), Britney Scott (Prairie View A & M), Rebecca Bayer (Tarleton State University)

Mentors – Dr. Christopher Murr (Texas State University), Shannon Crossland (Texas Tech University), Sarah Craighead (University of Texas at Austin), Karen Long-Trail (Texas Women’s University), Rachael Fournier (University of Texas at Arlington), Julie Wittmis (Texas Women’s University)

Summary of recent activities:

- Traveled to Temple to meet with protégé, Melissa Jones, to learn more about her experience this year in the program.
- Submitted a blog, as testimonial, written by a protégé, promoting the benefits of the program.
- Attended the ABC Workshop and 2018 TASFAA fall conference, to recruit proteges for the 2018-2019 year.

TASFAA Committee Reports

Mentor/Protege Taskforce Committee (cont'd)

Various activities:

- Submitted a blog for the TASFAA Star prior to the 2017 TASFAA conference to encourage attendees to learn more and sign-up at the event
- Created a sign-up, pairing spreadsheet, guidelines, and a commitment form for participants to return signed/dated
- Corresponded with Training Committee, to request list of ABC Workshop attendees, as well as NAOW, for recruitment
- Paired proteges with mentors, as close demographically as possible
- Corresponded with participants via mail, phone, email throughout the year
- Emailed mentors, frequently, with suggestions for various talking points for interactions
- Created surveys, via Survey Monkey, for proteges to respond to, to receive valuable feedback
- Experimented with a “pilot” program for the 2018 NAOW, led by Karen Long-Trail. This program consisted of recent new hires from TWU, who were attending NAOW, and would get first-hand exposure to TASFAA “in action” assisting with that TASFAA event.

Upcoming events and tasks:

- Contact all attendees of the ABC Workshop to recruit new proteges.
- Frequently, conduct surveys, via Survey Monkey, to proteges/mentors throughout the year.
- Contact TASFAA award winners quickly, such as the Star Award winner, etc.
- Submit a blog sharing contact information and a summary of this program.
- Contact individual universities in the TASFAA membership to encourage participation in the program.
- Attend NAOW and regional trainings in 2018-2019.
- Continue to work closely with the Training Committee to seek out new proteges and promote the program.
- Compose in-depth guidelines for effective mentoring and provide questions to facilitate interactions. Contact TASFAA Board members with these guidelines and suggestions for interactions with new proteges.
- Continue to support Board members throughout the year, as needed, to contact assigned proteges. Assist Board members develop effective partnerships.
- Make frequent contact with proteges and mentors, and notifying proteges of all TASFAA trainings and Board meetings
- Encourage participants to submit blog for the TASFAA Star
- Nominate an outstanding mentor of the year

Financial impact:

The financial impact has been minimal for 2017-2018, however if committee members can promote the program at NAOW and/or regional trainings, then there may be a need to assist for mileage reimbursement for 2018-2019. The Chair or committee member(s) can be present for registration or check-in only so there is no need for hotel, depending on the distance to the event. There are no material expenses related to this program at this time. Most communication is done via email or phone. However, the future Chair may want to request a “banner” or signage of some kind to promote the program, so this can be used at TASFAA events, when trying to recruit participants. The Chair for 2018-2019 will determine any additional future expense related to the program.

TASFAA Committee Reports

Mentor/Protege Taskforce Committee (cont'd)

Conclusion:

Initially, there were 7 proteges, who signed-up for the program. There were 6 mentors from around the state, including our TASFAA President from Texas State University. By mid-year, several had been contacted by the mentors several times, but did not receive a respond back. Although this was the case, one protégé, Melissa Jones, was the year's success story and most "active" participant, assigned to Rachael Fournier. She used this experience to help her in her daily tasks, as well as improve her office's processes. This program and her positive mentorship experience assisted her in gaining valuable knowledge from her mentor and attaining an upper-level position at her current university. I consider hers a success story from our protégé mentor year, which speaks to the value of this program. The altruistic Rachael Fournier also made our program a success, embodying a model mentor. I value her willingness to share her time and knowledge with Melissa.

Throughout the year, it was very encouraging to have several mentors volunteer their time and expertise, which I was concerned might be an issue in the beginning. It proved more difficult to keep the proteges active, rather than gaining enough mentors. I attribute this to reserved proteges not feeling a comfort level at the beginning and not knowing who he/she would be paired with, as well as issues with distance. There were also proteges who left the financial aid industry altogether over the course of the year.

This program can certainly assist with retention of these new financial aid professionals. These new to the industry have potential as future leaders, if he/she can be encouraged and inspired by our Board members and experienced financial aid professionals to continue to learn more via TASFAA trainings and seeking NASFAA credential opportunities, as well as attending TASFAA events or serving on TASFAA committees. With strong support from the Training Committee, I have felt encouraged myself to press on and encourage our participants throughout the year. My hope is this program will continue, either as a stand-alone committee, or as incorporated into the Training Committee. For the 2018-2019 year, I know the TASFAA Board members will provide the necessary encouragement and support for our new financial aid professionals, so they may stay in the industry and be successful contributors in their prospective schools. Thank you for allowing me to serve as Chair for 2017-2018.

Nominations & Elections Committee

Alan D. Ahmad - Alamo Colleges District, Co-Chair

Shannon L Crossland - Texas Tech University, Co-Chair

Following guidelines set in TASFAA's *Policy & Procedures*, the Nominations & Elections committee solicited nominations for four (4) open Board Member-at-Large positions and one (1) President-Elect position. Nominations were collected, reviewed and presented to the TASFAA Board before forwarding to ATAC for ballot development. Elections were held per Policy and results posted for membership.

President-Elect 2018-19:

Lyn W Kinyon, University of Texas - Arlington

Board Members-at-Large 2018-2020:

Zelma DeLeon, University of North Texas

Carolyn Jones, Collin County Community College

Christy Miller, Texas Tech University

David Orsag, University of Mary Hardin-Baylor

TASFAA Committee Reports

Regional Training Committee

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

Christy Miller - Texas Tech University, Co-Chair

TASFAA Regional Training conducted the FY 18 regional trainings. We invited new presenters from the Texas Higher Education Coordinating Board and invited the Department of Education to present Federal Updates. This year we reduced the number of trainings, but still had great turn out.

This year's topics included state and federal updates, as well as sessions about Year-Round Pell and Courses Counting Towards a Degree.

Training was held at four sites that included: Houston, Dallas/Ft. Worth, San Marcos, and Lubbock. The regional training in Lubbock had a slightly different agenda (Courses Counting Towards a Degree was eliminated and Legislative Updates was added) than the other sites due to presenter availability. Food for the Lubbock site was funded by Panhandle Plains.

Number of attendees per site was as follows:

Location Name	Event City	Event Total #Attended
Lone Star College – Cy Fair	Houston	98
University of Texas at Arlington	Arlington	172
Texas State University	San Marcos	90
Lubbock Christian University	Lubbock	52

We were originally given a budget of \$11,855 which included funding from TASFAA (\$4,500), vendor support (\$2,355), and Trellis Company (\$5,000). We were able to provide coffee and donuts in the morning, drinks and candy throughout the day, and a catered lunch for each site. With food and travel costs for the two committee chairs, we were still able to stay under budget and only spent \$7,538 for FY 18 Regional Trainings.

Thank you to each of the contacts at the host campuses. They were a huge help in making Regional Trainings a success this year. Thank you also to everyone that volunteered to help at the sites on the day of the events. We couldn't have done it without you! We are excited to get to co-chair TASFAA Regional Trainings again for FY 19 and have lots of ideas we are ready to share with everyone.



TASFAA Committee Reports

Training Committee

* Karen Long-Trail, Chair, T. Boone Pickens Institute of Health Sciences-TWU Dallas Center, Presenter
Rachael Fournier, Co-Chair, University of Texas at Arlington, 2018 Trailblazer Recipient
David Orsag, University of Mary Hardin Baylor, Presenter
*Angela Parkoff, Texas A&M, 2015 Trailblazer Recipient
*Dennise Mendez, Texas A&M, Chief of Education
Danchees “D” Ingram, University of Texas Southwestern Medical Center, Co-Chair 2019
* Kimberly Schwaeble, Rice University, Marketing
*Julie Wittmis, Texas Woman’s University, Chief Editor
Zachary D. Krueger, University of Mary Hardin Baylor, Presenter
John Scully, Texas State University, Presenter-2019 MC
Mariah Fournier, Dallas Community College District, Presenter/Marketing

**NASFAA Credentialed*

Cheers to the TASFAA Training Committee,

The TASFAA Training Committee is honored to have successfully executed two training programs offered by the association: the Spring New Aid Officer’s Workshop and the Fall ABC Workshop, for both new and seasoned financial aid professionals. In addition, the training committee is pleased to announce over the last two years one hundred and sixty two new financial aid officers were trained in the Houston area.

The spring 2018 New Aid Officer’s theme name was, “We are the Champions, my friends, and we’ll keep on fighting to the end.” Additional topics were added to this year’s curriculum to provide visibility in additional areas in enrollment management and “to provide the big picture” to new financial aid professionals. FERPA, presented by Texas Woman’s University Registrar, Mr. Robert Lothringer, has consistently been surveyed as the top area of interest to our participants. In addition, Financial Literacy, and Consumer Information have been added to both the New Aid Officer Workshop and ABC Workshop sessions. For the spring of 2019 we are adding the topic Financial Wellness to provide visibility to employee wellness.

The nuts and bolts of the NAOW education featured content areas such as Professional Judgment, Packaging, Need Analysis, Verification, Satisfactory Academic Progress, the History of Financial Aid, Return of Title IV Funds, and Income-Driven Repayment Plans. In addition, new curriculum subjects were introduced which were Loans, Financial Literacy, an overview of Enrollment Services and Understanding and Improving Communication (D.O.P.E. Training). The Texas Higher Education Board presented State Programs and Updates, and Training Officers from the Department of Education covered the topics of Pell and Campus-Based Programs.



TASFAA Committee Reports

Training Committee (cont'd)

TASFAA/Training/ Marketing/Updates

This year it was a pleasure to meet with Congressman Pete Sessions in Washington. Congressman Sessions was very interested in TASFAA and the training provided to new financial aid professionals. In addition, Mr. Sessions also was pleased the commitment the training committee follows to provide rigorous training and showing due diligence with tax payer funds and creating a positive global footprint.

The TASFAA Training Committee has created, implemented and developed numerous new and creative marketing strategies in three distinct areas for the 2017-2019 committee goals.

1. Strategic marketing endeavors such as the “Development of the Directors Information Letter, Professional Biography Presenters Page, and monthly marketing messages on the TASFAA ListServ/Cultivating a type of consistent branding for the presenters
2. Promotion of roles and responsibilities for training committee members to provide growth and training for each participant professionally and personally
3. The addition of the role, Chief Editor” that provides review of all program material and integrity of the presentations.
4. Team Building Exercises for the training committee. This year the team attended Basketball Spurs Game, the Houston Astros Game, and participating in a island treasure team hunt.

For the year of 2019 the committee will focus on new technology platforms for marketing and to create a social media presence.

The Fall ABC Workshop

The fall ABC Workshop coordinated with the TASFAA Fall Conference was hosted in Galveston, Texas October 1, 3rd. The basics were covered in a day and a half of tight schedule.

Our very own, Ms. Rachael Fournier, was awarded the 2018 Trailblazer Award for TASFAA. Ms. Fournier has been instrumental in the success of the Training Committee and we are all so proud of her accomplishments.

Ms. D Ingram has been named Co-Chair for the 2019 TASFAA Training Team. Ms. Ingram’s commitment to training and entertaining the participants is invaluable to the team.

The spring 2019 NAOW will be hosted at Great Wolfe Lodge, Grapevine Texas

The Training Committee has big plans for NAOW. The team is planning on hosting the largest class to date.

Look for marketing updates about NAOW 2019.

Lead...And Be Part of the Pack. For the Wolfe in You.

It’s been a Pleasure

It’s been an honor to have a talented, motivated, trained committee that will meet the needs of the TASFAA organization, the institutions, and professionally grow, develop new skills, and teach future financial aid officers timely, effective and relevant information.

2018 TASFAA Training Chair, Karen Long-Trail



TASFAA Committee Reports

Web Services Committee

John Sculley - Texas State University, Chair

Kevin Armalay - University of Texas - Austin, Co-Chair

Alan Ahmad - Alamo Colleges District, Board Liaison

Chis Murr, Ph.D. - Texas State University, Board Liaison

The Web Services Committee was honored to take on the tasks given to them this year. Over the course of the past year, we averaged thirty-one employment listings per quarter, executed over one hundred and eighty requests and amendments for the TASFAA website, worked with ATAC on updating the TASFAA website with a more functional platform and implemented all of the requests for the TASFAA Fall Conference Mini Site. The Conference Mini Site is by far our largest project to take on every year.



2018 TASFAA Annual Report



*The TASFAA Annual Report was created by the
Communications & Social Media Committee*