

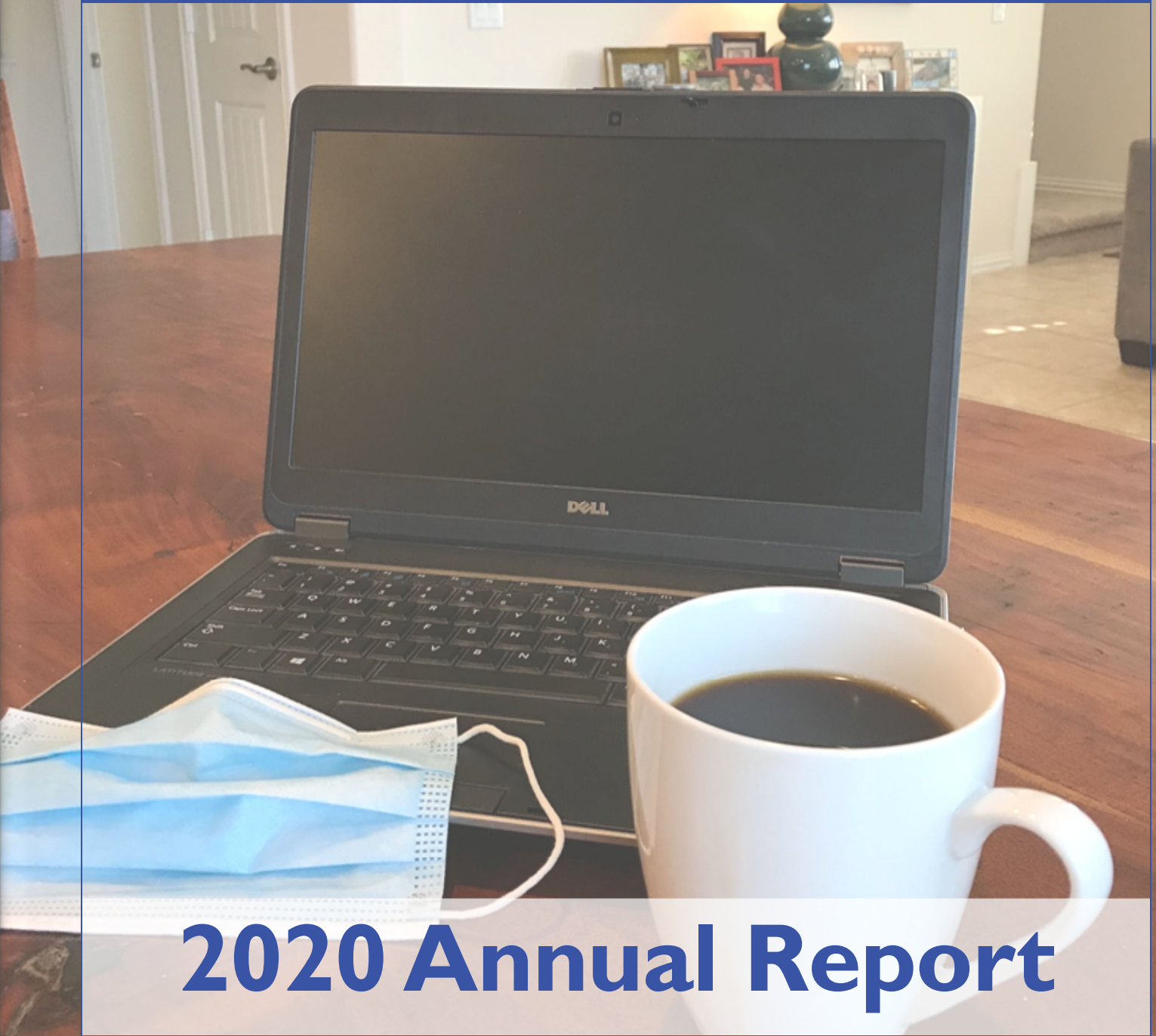


**TASFAA**  
EST. ★ 1967

# TASFAA

encourage • promote • facilitate • inspire • motivate

*Texas Association of Student Financial Aid Administrators*



## 2020 Annual Report

**TASFAA @ Home Edition**



## TABLE OF CONTENTS

---

About TASFAA .....	3
TASFAA President's Letter .....	4
TASFAA Officers .....	5
TASFAA Board Members .....	6
TASFAA @ Home .....	7
TASFAA Awards.....	9
TASFAA Members Recognized by NASFAA	10
TASFAA @ Events .....	11
Awards & Scholarships Committee .....	14
Communications & Social Media Committee	21
Constitution & By-Laws Committee .....	23
Disaster Recovery Plan Task Force .....	24
Diversity & Inclusion Task Force .....	26
Early Awareness Committee .....	28
Electronic Training Task Force .....	33
Fall Conference Committee .....	35
Finance Committee .....	36
Legislative Issues Committee .....	37
Membership Committee.....	46
Membership Fees & Structure Task force ....	47
Mentor/Protégé Committee.....	49
NASFAA Credentialing Committee .....	52
Nominations & Elections Committee .....	53
Regional Training Committee .....	54
Site Selection Committee .....	55
Sponsor Relations Committee .....	56
SWASFAA Relations Committee.....	59
Training Committee .....	60
Web Services Committee .....	62

---

# ABOUT 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.

## 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.

## Diversity and Inclusiveness Statement

TASFAA is firmly committed to fostering a warm, open environment for Financial Aid Professionals, as our membership is comprised of many intersecting identities that make us unique individuals. We strive to eliminate discrimination including, but not limited to: race, color, ethnicity, national origin, gender, gender identity and expression, sexual orientation, age or veteran status. Additionally, we embrace the cultural, political, social class and religious affiliations of our members, as those differences allow us to best serve the vastly diverse student community in the State of Texas.

## Established in 1967, TASFAA serves multiple roles including:

- **Encouraging** students to pursue higher education.
- **Promoting** student financial aid programs in the post-secondary institutions of the state.
- **Facilitating** communication, activities, services and professional development among constituencies involved in student financial aid administration in the state.
- **Inspiring** professional competencies in the field of student financial aid administration.
- **Motivating** innovation and creativity in the financial aid field to span all cohorts.



# TASFAA PRESIDENT'S LETTER

---

Dear TASFAA Friends and Colleagues:

When I served TASFAA as president in 1998-1999, I assumed it was a once in a lifetime opportunity. I am so very humbled to have been given the chance to serve in this capacity for a second time during the 2019-2020 year. Thank you, TASFAA, for your support and encouragement.

As the 2019-2020 year began, the Board, committees, and task forces were energized and eager to provide the activities and training opportunities to which the TASFAA membership has become accustomed. Unfortunately, with the onset of the pandemic soon after the year began, our hopes and plans for the TASFAA year were put on hold. Over the course of several months, the Board made some very difficult but necessary and good decisions which would alter our plans.

Though we were not able to provide the in-person activities or on-line training opportunities as we had hoped due to the multiple individual and group challenges brought on by the pandemic, we were able to accomplish several important goals as shared by the committee and task force reports that follow. I very much appreciate each of the committee and task force members for doing what they could to make this year successful in its own unique way.

My sincere thanks to the Board of Directors, committee chairs, task force leaders, and the many volunteers for your willingness to serve TASFAA during this unprecedented year and for the support you have given me. As I have said so many times, TASFAA is truly one of the loves of my life, and it has been an honor and a privilege to serve one more time.

Thank you!

*Lyn W. Kinyon*

2019-2020 TASFAA President



# TASFAA OFFICERS

---



## President

Lyn W. Kinyon  
University of Texas  
at Arlington



## Vice President

Christy Miller  
Wayland Baptist University



## President Elect

Taryn Anderson  
University of Dallas



## Past President

Delisa Falks  
Texas A&M University



## Treasurer

Fabian Vasquez  
Texas Tech University  
Health Sciences Center



## Secretary/Historian

Diane Todd-Sprague  
University of Texas at Austin

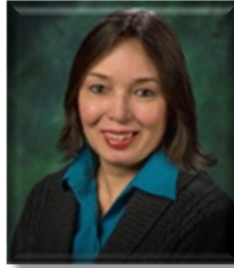


# TASFAA BOARD MEMBERS

---



**Cynthia Butler**  
Dallas College



**Zelma DeLeon**  
University of North Texas



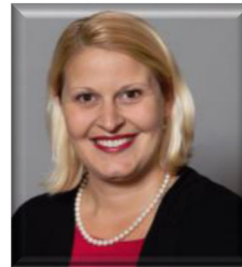
**Dede Gonzales**  
Texas State University



**David Orsag**  
University of  
Mary Hardin-Baylor



**Jael Perez**  
University of Texas  
Rio Grande Valley



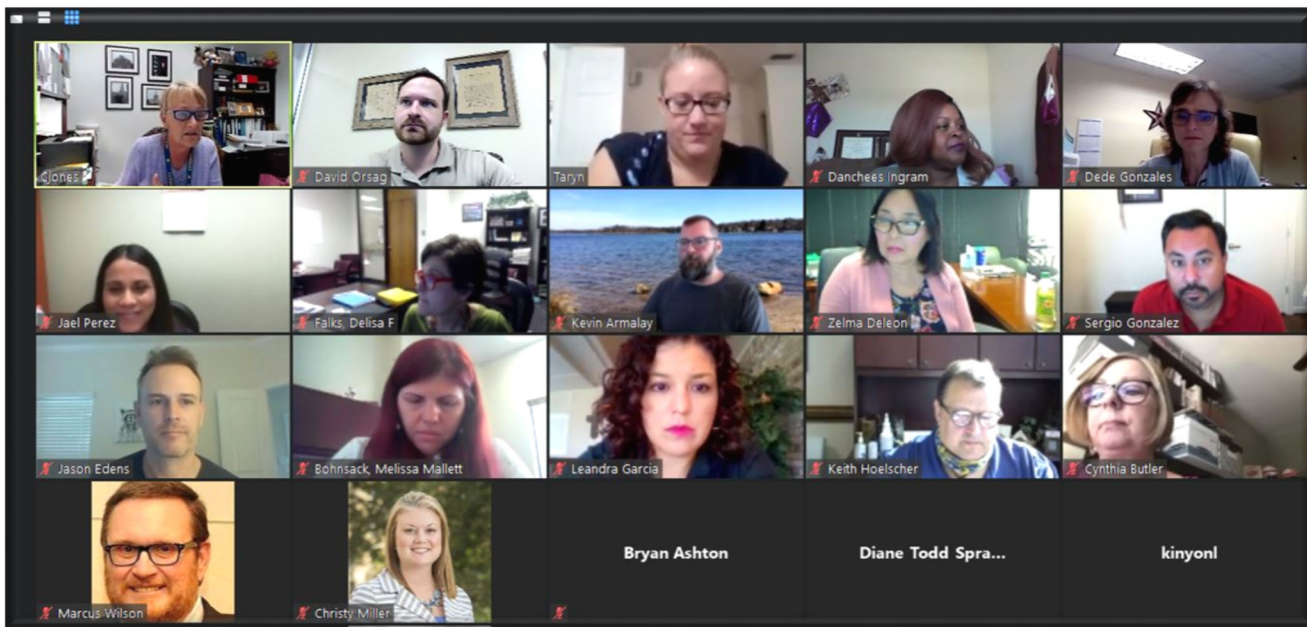
**Christina Pikla**  
Trinity University

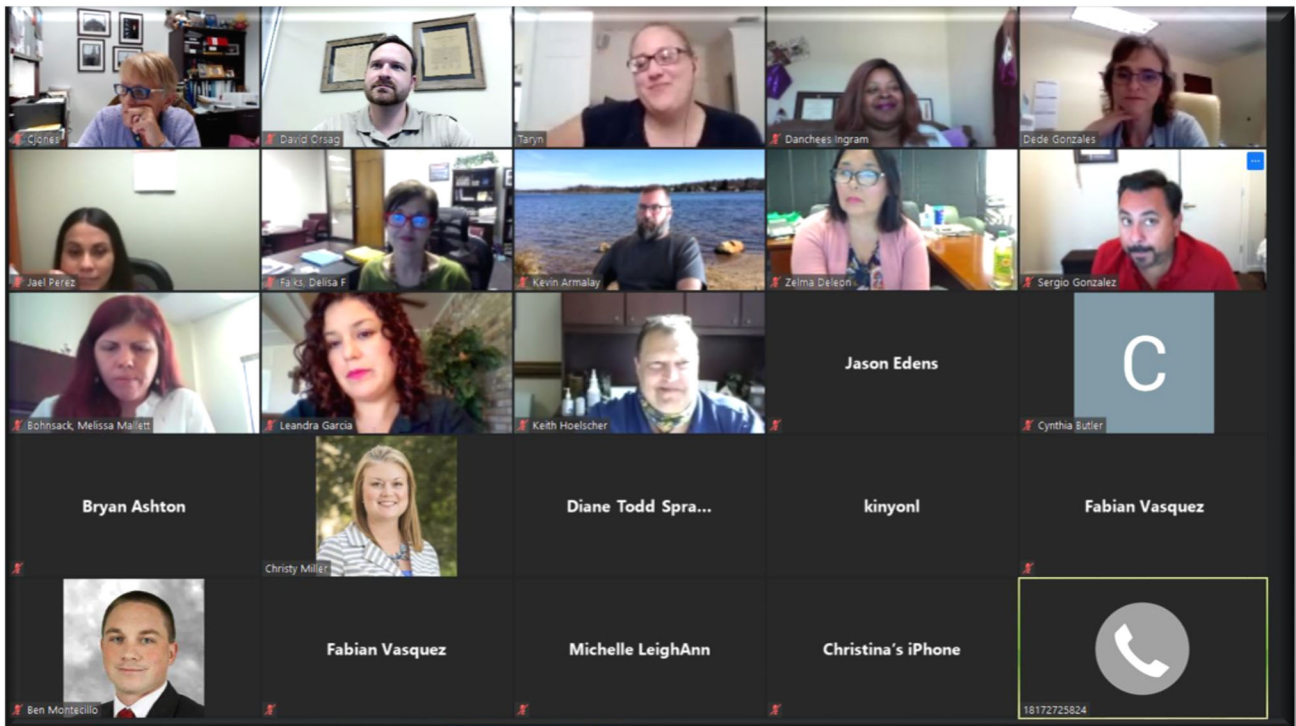


**Carolyn Jones**  
Collin College



# TASFAA @ HOME





# TASFAA AWARDS

---



## Financial Aid Support Award

**Stephanie Lopez**

Texas State University

This award recognizes outstanding efforts by an individual in a back office support role (not front line). Nominations for this award come from the membership, and recipients are selected by the Board. Awardees exemplify professionalism, innovation, go above and beyond the normal duties, and have worked in the financial aid industry for at least two years.



## Financial Aid Star Award

**Rachelle Daigle**

Texas A&M University at Galveston

This award recognizes outstanding efforts in the area of advising students by an individual in a front line position in the financial aid office of a TASFAA member school. Nominations for this award come from the membership, and recipients are selected by the Board. Awardees exemplify professionalism, innovation in advising students, use a number of communication methods to counsel students, go above and beyond the normal duties, and have worked in the financial aid industry for at least two years.



## Committee of the Year Award

### Web Services Committee

**Kevin Armalay, Chair** – University of Texas at Austin

**Jennifer Sanchez, Vice Chair** – University of Dallas

This award recognizes the members of a committee or task force who have made a significant contribution to the activities and betterment of the Association in a manner which brings a unique distinction to the group. Recipients of this award are selected by the Officers and Board. The award is presented to each member of the committee/task force.



## Trailblazer Award

**Jason Edens**

Austin Community College

This award recognizes an “up and coming leader” of the Association. Recipients of this award are selected by the Officers and Board. The Trailblazer must be a member of TASFAA and must have served TASFAA during the last three years, serving the higher education arena and students with creative energy, dedication, and commitment.

# TASFAA MEMBERS RECOGNIZED BY NASFAA

---



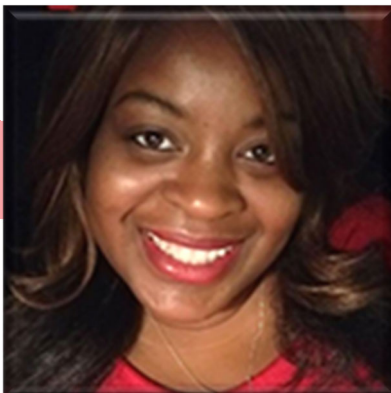
## NASFAA's Most Valuable Professional (MVP) October 2020

### **Delisa Falks**

Assistant Vice President for Scholarships & Financial Aid  
Texas A&M University

### [Read NASFAA's article about Delisa Falks](#)

MVP's are nominated by their peers and selected by NASFAA. Delisa has been very active with TASFAA for many years and served as the Past President during the 2019-20 year. Delisa has served on and chaired the Financial Aid Advisory Committee for the Texas Higher Education Coordinating Board (THECB) and has been involved with the Coalition of State University Aid Administrators (COSUAA).



## NASFAA's Diversity Leadership Program (DLP) SWASFAA Representative 2019-20 Class

### **Danchees "D." Ingram**

Associate Director of Student Financial Aid  
University of Texas Southwestern Medical Center

### [Read NASFAA's article about D. Ingram](#)

Applications for the DLP are peer-reviewed, and only six financial-aid professionals (one from each region) are selected by their colleagues each year. D. has been actively involved with TASFAA for several years. She served as the Co-Chair of TASFAA's Training Committee this year, and she received TASFAA's Trailblazer Award last year.

# 2020 NASFAA Leadership Conference

## Washington, D.C.

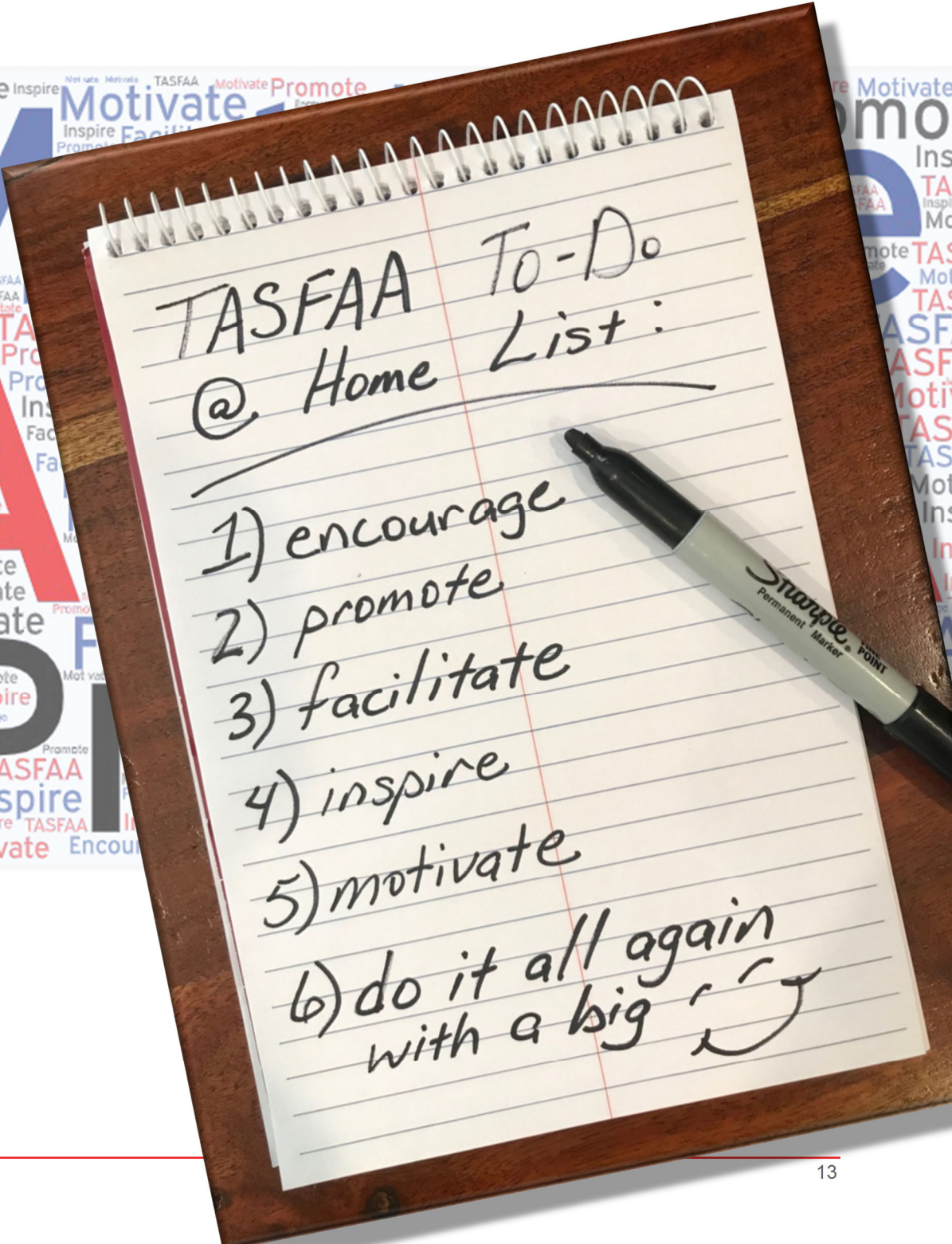


## Reno, NV



# TASFAA COMMITTEE & TASK FORCE YEAR-END REPORTS

---



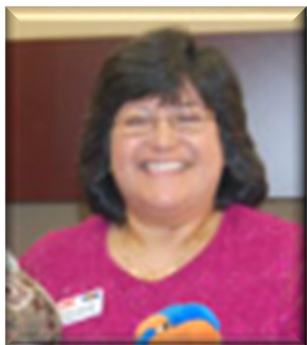
## TASFAA To-Do @ Home List:

- 1) encourage
- 2) promote
- 3) facilitate
- 4) inspire
- 5) motivate

6) do it all again  
with a big 😊

# AWARDS & SCHOLARSHIPS COMMITTEE

---



## Committee Chair

Diana S. Martinez  
University of Texas at San Antonio

## Committee Members

---

Cecilia Jones  
Jarvis Christian College

Felicia Rush  
Austin Community College

Delisa Falks  
Texas A&M University

Cindy Breen  
Amberton University

Elsa Ramos  
University of Texas at Austin

Kerline Eglaus  
Lone Star College

Mariah Fournier  
Dallas College

Carolyn Mallory  
University of Houston-Victoria

Thresa Tyus  
North Texas Higher Education  
Authority

Holly Nolan  
University of Houston-  
Clear Lake

## Committee Activity

The committee roster was updated with new committee members for 2019-2020.

The ATLE-TASFAA Education Scholarship and the Mark C. Adams Scholarships were posted but due to COVID-19, both were canceled.

During the April 2020 board meeting, the recommended changes were approved for the Financial Aid Star Award, Financial Aid Support, Teaching and Mentoring and Hall of Fame. Scholarship applications were posted on the TASFAA website and recipients reviewed and selected.

During the October 9, 2020 annual meeting, the announcements of the 216 service pins were announced (10 years = 56; 15 years = 43; 20 years = 55; 25 years = 26; 30 years = 24; 35 years = 7 and 40 years = 5). Also announced were the recipients for the Financial Aid Support Award - Stephanie Lopez, Texas State San Marcos; Financial Aid Star Award - Rachelle Daigle, Texas A&M Galveston; Trailerblazer - Jason Edens, Austin Community College; Committee of the Year - Web Services Committee - Kevin Armalay, University of Texas at Austin and Jennifer Sanchez, University of Dallas.

The current inventory of service pins was evaluated to determine if we needed to place an order for additional pins. Based on that review, we will be short in three categories of pins (10 years: 50; 25 years: 50 and 30 years: 20). An order was placed with Moisant Promotional Products, specifically with Ashley Hibdon (ashley@moisant.com); (405) 691-1738. The cost of the order will be \$615.

Six plaques were ordered from A Laser's Touch with Jeff McKinnon (jeff@laserstouch.com); 806-783-0999.

## TASFAA Service Pins Issued for 2019-20

Full Name	Organization	Yrs of Service	Title
Agapito Garcia	The University of Texas at Dallas	10	Director, Financial Aid Operations
Ana Ramirez	Texas A&M University	10	Financial Aid Officer I
Araceli Merryman	Collin County Community College	10	Financial Aid & Veterans Affairs Advisor
Araceli Moreno	TTU Health Sciences Center - El Paso	10	VA/FA Coordinator @ El Paso
Azuree Wilson	San Jacinto College	10	Financial Aid Service Advisor
Bethany Bowman	Lamar University	10	Assistant Director
Brandye Freeman	Lone Star College System	10	Financial Aid Training Coordinator I
Candice Draper	Howard College	10	District Dean Financial Aid
Carmen Garcia	El Paso Community College	10	Financial Aid Specialist
Cathy Lopez	University of Texas - San Antonio Health Science Center	10	Student Administration Assistant
Cathy Sarabia	Texas Tech University	10	Business Manager
Courtney Todd	Texas State University	10	Verification Specialist
Darcelle Cowles	Tyler Junior College	10	Application Support Analyst
Deffie Williams	Southern Methodist University	10	Financial Aid Advisor
DoNisa Hooks	Dallas County Community College	10	Team Lead Call Center Agent
Duane Valencia	Southwestern Adventist University	10	Asst. Financial VP, Student Finance
Eddie Sanchez	Texas Tech University	10	Advisor
Frank Gomez	University of Houston	10	Quality Control Program Coordinator
Gwendolyn Richmond	University of Houston	10	Financial Aid Advisor
James Guguei	Dallas County Community College	10	College FA Advisor
Janine Salas	Texas Tech University	10	Unit Coordinator
Jennifer Miller	University of Texas - El Paso	10	Assistant Director
Jennifer Williams	Dallas County Community College	10	Financial Aid Advisor
Joshua Lowry	San Jacinto College	10	Financial Aid Services Manager
Judy Anzaldua	South Texas College	10	Financial Aid Outreach Specialist
Judy Dohrman	Sam Houston State University	10	Accountant III
Kirsten Morrow	Hill College	10	Loan Advisor
Krystal Guzman	South Texas College	10	Financial Aid Technician
Kyle-Michael Bain	Prairie View A&M University	10	Systems Administrator II
LaShanda Parkhurst	Stephen F. Austin State University	10	Financial Aid Counselor
Liza Villadiego	Midwestern State University	10	Financial Aid Counselor
Luis Alaniz	University of Houston	10	Program Coordinator 2
Maegen Benedetti	University of Houston - Downtown	10	Coordinator, Default Prevention
Maria Villarreal	Southwest Texas Junior College	10	Financial Aid Clerk

Full Name	Organization	Yrs of Service	Title
Mariah Fournier	Dallas County Community College	10	Financial Aid Specialist
Marivel Ojeda	St. Mary's University	10	Assistant Director, Financial Assistance
Matt Brown	University of Texas - Dallas	10	Student Financial Aid Officer IV/ Manager, Customer Service Team
Melissa Guerra	Southern Methodist University	10	Scholarship Coordinator
Michael Lugo	Texas A&M University - Kingsville	10	Asst Director of Veterans Affairs
Michaela Lewis	Dallas County Community College	10	Financial Aid Advisor
Michelle Hill	Alamo Colleges District	10	Director
Michelle Smith	Abilene Christian University	10	Financial Aid Advisor
Palyce Williams	Texas A&M University	10	Financial Aid Advisor II
Priscilla Munoz	Texas A&M International University	10	Financial Aid Specialist
Rachel Vaughan	University of Dallas	10	Financial Aid Counselor
Rafael Gonzalez	Texas State University	10	Scholarship Counselor
Ralph Ramon	Western Texas College	10	Dean of Students
Rene Medina Jr.	South Texas College	10	Financial Aid Specialist
Sefra Lopez	Texas A&M University	10	Financial Aid Advisor
Shermain Reed	Dallas Baptist University	10	Director of Financial Aid
Stephanie Castillo	Tarrant County College	10	Financial Aid Associate
Susan Lewis	University of Texas - Dallas	10	Loan Coordinator
Suzanne Ramirez	Laredo College	10	Lead Financial Aid Coordinator
Tammy Anderson	Houston Community College System	10	Coordinator, Financial Aid
Tracy Ballard	Amarillo College	10	Loan Coordinator
Zarita Barton	Lone Star College System	10	Director of Financial Aid
Alisha Stoll	University of the Incarnate Word	15	Financial Assistance Advisor
Amanda Hauck	Trinity Valley Community College	15	Financial Aid Officer I
Angela Speech	Texas College	15	Director of Financial Aid
Beverly Fields	Frank Phillips College	15	Director of Student Financial Services
Bob Smith	Abilene Christian University	15	Financial Services Counselor
Brandy Gilliam	Texas Woman's University	15	Financial Aid Counselor II
Breanda Williams	Dallas Christian College	15	Director of Student Financial Services
Carrie Pratt	Dallas County Community College	15	Communications & Training Sr Mgr
Connie Silva	Southwest Texas Junior College	15	Financial Aid Advisor
Crystal Thomas	Texas A&M University - Commerce	15	Financial Aid Advisor
Debbie Newhouse	Dallas Baptist University	15	Financial Aid Counselor
Dell Cox	Amarillo College	15	Financial Aid Assistant
Diana Kinto	Lamar State College-Orange	15	Financial Aid Coordinator
Elisha Cruz	UT Southwestern Medical Center	15	Financial Aid Officer
Elizabeth Puthoff	Independent Colleges and Universities of Texas, Inc.	15	Vice President for Research and Policy Analysis
Enrique Ortiz	South Texas College	15	Student financial Services Specialist

Full Name	Organization	Yrs of Service	Title
Erica Miller	Texas Lutheran University	15	Director of Financial Aid
Geoff Miller	Dallas Baptist University	15	Financial Aid Counselor
Heather Fountain	Texas A&M University	15	Associate Director
Jael Perez	University of Texas-Rio Grande Valley	15	Associate Director
Jennifer Tamayo	Alamo Colleges District	15	Process Functional Manager
Joe Rodriguez	Tarrant County College	15	Financial Aid Specialist
Kay Wright	Brazosport College	15	Director, Financial Aid
Kevin Hodge	Lone Star College System	15	System Director of Program Operations-Financial Aid
Kevin Montgomery	Higher Ed Servicing Corp / NTHEA	15	Creative & Communications Manager
Lisa Dickson	Texas State University	15	Administrative Assistant III
Maria Arroyo Ramos	El Paso Community College	15	certification Specialist
Mary Rios	Texas State University	15	Financial Aid Counselor
Nathan Flory	East Texas Baptist University	15	Director of Financial Aid
Paul Burke	Financial Aid TV	15	VP Sales
Paula Thomas	Parker University	15	Financial Aid Officer
Rachel Leyva	Galveston College	15	Financial Aid Specialist
Samantha Booker	Texas Southern University	15	Financial Aid Counselor
Sharon Finney	San Jacinto College	15	Financial Aid Services Specialist
Tim Sechrist	McMurry University	15	Director
Tyese Dunn	Galveston College	15	Financial Aid Coordinator
Veronica Gabbard	Houston Baptist University	15	Director, Financial Aid
Vicki House	Hardin-Simmons University	15	VP, Enrollment Management
Virginia Cabrera	South Plains College	15	Financial Aid Advisor
William Chandler	Southern Methodist University	15	Loan Specialist
William Saenz	Texas A&M University - Kingsville	15	Financial Aid Officer
Yvette Vasquez	Tarrant County College	15	Student Financial Aid Assoc.
Yvonne Vera	San Jacinto College	15	Financial Aid Specialist
Alica Atkins	Angelo State University	20	Assistant Director of Financial Aid
Bianca Tidwell	El Paso Community College	20	Financial Aid Specialist
Billy Bossier	University of Texas - Austin	20	Financial Aid Officer II
Boni Jacobs	Houston Community College System	20	Dir, Financial Aid- Cust Serv & Proc
Brendan Walsh	Stephen F. Austin State University	20	Accountant
Casey Wells	Tyler Junior College	20	Financial Aid Officer/Loans
Cheryle Sozzi	Texas Lutheran University	20	Financial Aid Counselor
Cindy Luetzow	Southern Methodist University	20	Associate Director for UG Advisors
Clorene McDonald	Wayland Baptist University	20	Work-study Coordinator-Office Mgr
David Longoria	University of Texas at San Antonio	20	ESO I
Deborah George	University of Houston - Victoria	20	Senior Financial Aid Specialist

Full Name	Organization	Yrs of Service	Title
DeCha Reid	Texas Higher Ed Coordinating Board	20	Director of Financial Aid Services
DeRodrick Jonkins	Houston Community College System	20	Financial Aid Regional Manager
Donna Everson-Hampton	University of Texas - Dallas	20	Scholarship Coordinator
Dorothy Hampton	University of Texas - Arlington	20	Financial Aid Counselor
Dorothy Remmers	Alamo Colleges District	20	Financial Aid Specialist
Elsa Gaitan	Trinity University	20	Senior Secretary
Erika Williams	Del Mar College	20	Associate Director of Financial Aid
Gail Johnson	Texas A&M University- San Antonio	20	Associate Director of Financial Aid
Gail Schatte	Texas Medical Association	20	Director, Office of Trust Fund Administration
Gordon Brannon	Southern Methodist University	20	Senior Financial Aid Advisor
H. Rachele' Garrett	Stephen F. Austin State University	20	Director
Hannah Ferrer	Houston Community College System	20	Financial Aid Officer
Heather Thielemann	Sam Houston State University	20	Vice President for Enrollment Mgmt
James Gaeta	Southwestern University	20	Associate Dean of Enrollment Services
Jeanne Ballard	Vernon College	20	Assistant Director
Jeannette Costello	Dallas County Community College	20	Financial Aid Advisor
Jeff Recker	CommonBond	20	Account Manager, Campus Relations
Jennifer Jones	Texas Southern University	20	Data Analyst
Judith Cunningham	Trellis Company	20	Event Planner
Judy Adle	Texas State University	20	Financial Aid Assistant
Kimberly Bomnskie	University of Texas - Dallas	20	Administrative Assistant I
Lacey Thompson	University of North Texas	20	Director of Operations
LaVon Hardnett	Parker University	20	Sr. Financial Aid Advisor
Linda Dawson	Texas A&M University - Commerce	20	Financial Aid Assistant
Londa Sutton Harris	Texas State Technical College	20	Student Employment Specialist
Maria Faber	El Paso Community College	20	Financial Aid Specialist
Marlene Ruffino	Lone Star College System	20	scholarship advisor
May Steigman	University of Texas - Austin	20	Sr. Administrative Associate
Melet Leafgreen	UT Southwestern Medical Center	20	Director
Michael Corbett	Sul Ross State University	20	Director
Minita Ramirez	Texas A&M International University	20	Associate V.P. for Student Success
Molly Garrett	Tyler Junior College	20	Assistant Director, Financial Aid
Nichole Tullous	St. Edward's University	20	FAFSA Coordinator
Rachel Dixon	Lamar University	20	Financial Aid Assistant
Robert Trevino	University of Texas-Rio Grande Valley	20	Assistant Director
Susan Brown	San Jacinto College	20	SJC Financial Aid Services Specialist
Susan Johnston	Texarkana College	20	Director of Financial Aid
Susan Sterling	Lamar University	20	Loan Coordinator

Full Name	Organization	Yrs of Service	Title
Sylvia Hampton	Ranger College	20	Assistant Director of Financial Aid
Tamara Earle	Tarrant County College	20	Financial Aid Specialist
Vanessa Negrete	Texas Tech University	20	Associate Director
Wanda Zeno	Texas Southern University	20	Financial Aid Counselor
Yolanda Ramos	Midland College	20	Director of Financial Aid
Yomaira Arredondo	Dallas County Community College	20	Financial Aid Advisor
Amy Carcanagues	University of the Incarnate Word	25	Director, Office Financial Assistance
Belinda Suarez	Texas A&M University - Corpus Christi	25	Financial Specialist
Carmen Tanner	University of Texas - Dallas	25	Assistant Director
Celinda Sarabia	Texas A&M International University	25	Office Coordinator
Charita Hampton	University of Houston	25	Director, ERP Applications
Christine Bowman	Southwestern University	25	Dean of Admission & Enrollment Svcs
Christine Gauger	University of Texas - Austin	25	Assistant Director
Dede Gonzales	Texas State University	25	Associate Director
D'Nitris Phillips	Alamo Colleges District	25	Associate Director
Eddie Davis	Southwestern Assemblies of God Univ	25	Vice President for Enrollment
Heather Beckles-Bright	University of Texas Health Science Center at Houston	25	Assistant Director
India Powell	Lone Star College System	25	Financial Aid Specialist
Irish Beason	Stephen F. Austin State University	25	Financial Aid Officer
Jennifer Beck	St. Edward's University	25	Director of Student Financial Aid
Jennifer Herman	University of North Texas	25	IT Specialist III
Joel Juliot	University of North Texas	25	Financial Aid Counselor
Lea Sikora	University of Texas - Arlington	25	Assistant Director of Loan Programs
Lisa Wolman	Tyler Junior College	25	Financial Aid Specialist
Melinda Oliver	Baylor University	25	Assistant Director
Mia Myers	TTU Health Sciences Center-Lubbock	25	Assistant Director
Renee Suryan	MPOWER Financing	25	Director of University Relations
Rosalinda Encina	Alamo Colleges District	25	Assoc Director, Student Financial Aid
Samantha Stalnaker	Tarrant County College	25	District Director of Student Fin Aid Svcs
Sergio Gonzalez	Sallie Mae	25	Director, Business Development
Tricia Johnson	Wells Fargo Education Financial Svcs	25	Account Executive
William Ayers	College Ave Student Loans	25	Head of Campus Development
Becky Johnson	Odessa College	30	Financial Aid Specialist
Bonita Coleman	Lone Star College System	30	FA Lead
Craig Poleman	SoFi (Social Finance, Inc)	30	Director, Campus Relationships
Debbie Mar	Texas Christian University	30	Senior Financial Aid Adviser
Diana Martinez	University of Texas at San Antonio	30	Director of Scholarships
Donna Story	Stephen F. Austin State University	30	Sr. FA Officer

Full Name	Organization	Yrs of Service	Title
Johnna Bolden	McMurry University	30	Assistant Director of Financial Aid
Keri Farrier	Texas Woman's University	30	Financial Aid Counselor II
Kim Crier	Dallas County Community College	30	Project Manager
Laurie Coulter	Austin College	30	Assistant V.P. for Institutional Enrollment & Exec Director of FA
Lisa Blazer	Texas A&M College Station	30	Associate VP for Enrollment Services
Lisa Lin	Texas Health and Science University	30	President
Lorena Rios	Laredo College	30	Assistant Registrar
Lynda Sheets	Panhandle-Plains Management & Service Corp.	30	Business Analyst
Marilyn Faller	West Coast University	30	VP Financial Aid
Michelle Aldana	Alamo Colleges District	30	Financial Aid Specialist
Michelle Enriquez	Citizens Bank	30	VP, Account Executive
Paige Hendricks	Edfinancial Services	30	AVP, West & Southwest Regional Dir
Pamela Shuttlesworth	Dallas County Community College	30	District Director of Financial Aid
Reginald Dickens	Jarvis Christian College	30	Vice President For Finance and Admin
Robin Famiglietti	Sallie Mae	30	Vice President
Sandra Jones	McLennan Community College	30	Associate Director Financial Aid
Stacy Flood	Austin Community College	30	Campus Supervisor
Stan Eddy	Southern Methodist University	30	Assoc Director-Institutional Compliance
Beverly Reeser	Collin County Community College	35	Financial Aid/Veteran Affairs, Manager
Carlos Salinas	University of Texas at San Antonio	35	Sr. Systems Administrator
Don Hilton	Ranger College	35	Financial Aid Director
Patrick Reyna	Baptist Health System School of Health Professions	35	Director of Financial Aid
Peter Beilharz	St. Edward's University	35	Bursar
Sherrie Miles	Dallas County Community College	35	FA Specialist
Shirley Leija	Alamo Colleges District	35	Associate Director
David Schwartz	Texas A&M University	40	Regional Financial Aid Advisor II
Hilda Pena	University of Texas - El Paso	40	Assistant Director
Jeffrey Ayers	Panhandle-Plains Management & Service Corp.	40	Asst. Vice President
Lyn Kinyon	University of Texas - Arlington	40	Associate Director
Yvonne Apodaca	El Paso Community College	40	Financial Aid Coordinator

# COMMUNICATIONS & SOCIAL MEDIA COMMITTEE

---



---

## Committee Chair

Jason Edens  
Austin Community College

## Committee Members

---

Odell “Trey” Kelley  
Univ. of Texas at San Antonio

Caroline Hernandez  
Austin Community College

Jessica Gomez  
Odessa College

Ana Chavez  
Collin College

Mariah Fournier  
Dallas College

Crystal Martinez-Smith  
Tarleton State University

## Committee Purpose

The Committee is responsible for collecting and disseminating relevant information to the TASFAA membership.

Relevant information may include, but is not limited to, disclosures required by TASFAA’s constitution or by-laws, TASFAA event promotion, training and professional development opportunities, or news from other sources such as the U.S. Department of Education or Texas Higher Education Coordinating Board.

The Committee is also responsible for managing TASFAA’s social media sites and for producing the Annual Report at the end of the fiscal year.

## Committee Activity

The Committee regularly sent mass emails, updated pages on the TASFAA website, and posted to TASFAA’s LinkedIn group in regards to the following:

- COVID-19:
  - Thirteen updates to “TASFAA’s COVID-19 Response” webpage with 2,048 hits
  - Five mass emails with a 14% average open rate
  - Eight LinkedIn posts
- “Today’s News from TASFAA” Newsletter:

- Eight mass emails with a total of twenty-four articles with a 16% avg open rate
- TASFAA President Messages:
  - Nine mass emails with a 17% average open rate
- TASFAA Board Nominations and Voting:
  - Four mass emails with a 15% average open rate
  - Two LinkedIn posts
- TASFAA Annual Business Meeting:
  - Two mass emails with a 15% average open rate
  - One LinkedIn post
- TASFAA Training Events:
  - Five mass emails with a 20% average open rate
  - Two LinkedIn posts
- Other Messages:
  - Fifteen mass emails with a 17% average open rate
  - Fourteen LinkedIn posts
- LinkedIn Posts:
  - Twenty-seven various posts to 173 members

## **Committee Accomplishments**

The Committee researched MemberClicks capabilities for sending mass communications to the membership and created templates within MemberClicks for future use when sending mass emails.

The Committee created the “Today’s News from TASFAA” newsletter to be sent to the membership regularly keeping them aware of TASFAA news, events, activities, and priorities.

## **Committee Pending Activity**

The Committee will combine with the Web Services Committee for the next year to assist in managing the TASFAA website and exploring the communication tools within MemberClicks.

The Committee will work to create various instructional videos for the membership relating to the creation and maintenance of personal and institutional profiles on the TASFAA website.

# CONSTITUTION & BY-LAWS COMMITTEE

---



## Committee Chair

Melet Leafgreen  
UT Southwestern Medical Center

## Committee Members

---

Shannon Crossland  
Texas Tech University

Nora Cargo  
Texas A&M University

Ben Monticello  
Texas Tech University  
Health Sciences Center

## Committee Activity

No changes were proposed or made to the TASFAA Constitution. At the direction of the Board of Directors, additional sections were added to the TASFAA Policies and Procedures manual as follows:

- 1.1.1 Statement of Diversity and Inclusiveness
- 5.3.9 Committee of the Year Award
- Appendix H - TASFAA Disaster Recovery & Records Retention Plans
- Appendix I - Corporate Sponsorship Opportunities Plan

Also at the direction of the Board, changes were made to the following sections:

- 5.3.4.3 Nomination Procedures
- 5.3.6 Financial Aid Star Award (a)
- 5.3.7 Teaching & Mentoring Award (a)
- 5.3.8 Financial Aid Support Award (a)

Finally, based on input from Officers and Committee Chairs, Officer and Committee information contained in Appendices C & D were updated. All changes to the P&P were approved by Board vote.

# DISASTER RECOVERY PLAN TASK FORCE

---



## Task Force Members

---

Cynthia Butler  
Dallas College

David Orsag  
University of Mary-Hardin Baylor

## Task Force Leader

---

Zelma DeLeon  
University of North Texas

## Task Force Charge

To come up with a Disaster Recovery Plan to ensure that in the case of a disaster, TASFAA will be able to continue to perform and follow through with mission-critical functions required by our governing documents.

## December 2019

Task Force members met for the first time on December 10, 2019 to go over action plans, steps, ideas, etc.

## February 2020

The task force members researched resources and gathered information to come up with an outline of Disaster Recovery Plan:

- FSA Conference Presentations
- Institution/Colleges Resources
- Other State Associations/NASFAA

## March 2020

Historical pandemic (COVID-19) crisis hit. Reality set in and enforced the necessity of a Disaster Recovery Plan. Our lives changed!

## April 2020

The task force members began working on a draft Disaster Recovery Plan using a base plan from another association.

## **June 2020**

The task force members finalized the draft and presented it to Lyn Kinyon, TASFAA President.

## **July 2020**

July 10, 2020 TASFAA Board Meeting:

- DRAFT TASFAA Disaster Recovery Plan was presented to the Board. Minor revisions made to the plan.
- The Board adopted the TASFAA Disaster Recovery Plan.
- The Board discussed the next steps for a future task force will be to work on the TASFAA Business Continuity Plan.
- The TASFAA Disaster Recovery Plan will be added to the TASFAA Policy and Procedures, Section 7, Appendix H.

## **Note from Task Force Leader**

September 2019, Lyn Kinyon, TASFAA president asked me to lead a TASFAA Disaster Recovery Plan Task Force. She had attended the NASFAA Leadership & Legislative Conference & Expo and learned that all state associations should have a disaster recovery plan in place. I agreed to lead the task force. David and Cynthia volunteered to be on the task force. At that time, little did we know what we would be facing in the next few months. A historical pandemic (COVID-19) hit, and all of us were needing to take actions with implementing and enforcing our own disaster recovery plans at our own institutions. Developing a disaster recovery plan during a real disaster was surreal, but it gave us first-hand experience of what we needed in the plan.

I want to thank Lyn for her wise foresight and Cynthia and David for being on the task force, and their hard work.

# DIVERSITY & INCLUSION TASK FORCE

---



---

## Task Force Leader

Taryn Anderson  
University of Dallas

## Task Force Members

---

Lonnie Rodriguez  
Trinity University

Joy Thomas  
Prairie View A&M University

Lindsay Partridge  
University of Texas  
Southwestern Medical Center

## Task Force Charge

The Diversity and Inclusion Task for met several times this year with the following purpose:

Explore what TASFAA is currently doing as well as what other organizations are doing. Make a recommendation to the Board about opportunities for diversity and inclusiveness in TASFAA events and programming

## Task Force Activity

The group started by coming up with a Diversity and Inclusiveness Statement which was approved by the Board in June and later added to the TASFAA website and P&P manual.

### ***TASFAA Diversity and Inclusiveness Statement***

*TASFAA is firmly committed to fostering a warm, open environment for Financial Aid Professionals, as our membership is comprised of many intersecting identities that make us unique individuals. We strive to eliminate discrimination including, but not limited to: race, color, ethnicity, national origin, gender, gender identity and expression, sexual orientation, age or veteran status. Additionally, we embrace the cultural, political, social class and religious affiliations of our members, as those differences allow us to best serve the vastly diverse student community in the State of Texas.*

Next the Task Force looked at opportunities within TASFAA's current committees to enhance its offerings. Three proposals were submitted at the October Board Meeting for consideration by the Board. The Task Force was asked to work in year two on advancing some of these initiatives.

**Idea 1:** TASFAA in the community: Financial Literacy, FAFSA nights, Youtube videos. Presentation. Materials or information that can be shared with community leaders so they can disseminate the info to their community. Working with Early Awareness to share financial aid information with students through new avenues (outside of just their high school counselors).

**Idea 2:** TASFAA Diversity recruitment. TASFAA representatives sign up to do job fairs and explain what the financial aid profession is. Find career Fairs at their own schools, encourage the Office of Financial Aid to sign up for their own job fairs. How does this promote diversity? Texas students are diverse so the "top of the funnel" is rich with diverse students. Current students are the next Financial Aid Counselors. And if TASFAA reps are the one recruiting the students a relationship (mentor) is created and hopefully that person can be encouraged to be active in TASFAA.

**Idea 3:** Texas Diversity Fellowship Award- Annual award given at the annual conference to a member who represents an underrepresented group and fosters leadership within TASFAA or their office. Awards could include NASFAA Leadership conference, TASFAA FELLOWSHIP (shadowing TASFAA BOARD or Committee), TASFAA Conference, with the goal to empower that individual to move up in the financial aid community.

The Task Force also reviewed and made recommendations for updates to the Appropriate Behavior and Non-Discrimination Policy

# EARLY AWARENESS COMMITTEE

---



## Committee Chair

Carolyn Jones  
Collin College

## Committee Members

---

Ana Chavez  
Collin College

Mary Escobar  
Angelo State University

Debra Urias  
Brazos Higher Education

Crystal Smith  
Tarleton State University

Michelle Enriquez  
Citizens Bank

Consuela Perez  
Southern Methodist University

Becky Hubbard  
Cognition Financial

Eddie Sanchez  
Texas Tech University

Richard Sapp  
Trellis Company

Brooke Woosley  
Brazosport College

## Task Force Activity

The Early Awareness Committee held 10 workshops around the state and had 296 Attendees.

Angelo State

Collin College

Dallas County College – Two Workshops

Stephen F. Austin State Univ – Two Workshops

Texas A & M College Station

Texas Christian University

The Alamo College District

University of Texas Arlington

Four workshops were cancelled because of COVID, and two were cancelled because of low registration. One was cancelled because of flooding from a Hurricane.

## High School Financial Aid Training

Host Sites	School	Contact	Email	Phone	WKSH Date	Attendees	ATLE Reg
1	Angelo State University	Ed Kerestly	<a href="mailto:ed.kerestly@angelo.edu">ed.kerestly@angelo.edu</a>	325-486-6748	10/1/2019	20	Complete
	Austin Community College	Caroline Hernandez	<a href="mailto:chernan3@austincc.edu">chernan3@austincc.edu</a>	512/223-7339	10/1/2019	Cancelled low registration	*
2	Collin College	Carolyn J Jones	<a href="mailto:cjones@collin.edu">cjones@collin.edu</a>	972/548-6762	10/18/2019	41	Complete
3	Dallas County CC District	Carrie Pratt	<a href="mailto:cpratt@dcccd.edu">cpratt@dcccd.edu</a>	214/378-1767	11/1/2019	15	Complete
4	Dallas County CC District	Carrie Pratt	<a href="mailto:cpratt@dcccd.edu">cpratt@dcccd.edu</a>	214/378-1767	2/1/2020	13	Complete
	Lamar University	Bethany Inesta Bowman	<a href="mailto:bbowman1@lamar.edu">bbowman1@lamar.edu</a>	409/880-7340		Cancelled because of flooding from Hurricane!	
5	Stephen F Austin State Univ	H Rachele Garrett	<a href="mailto:nixonhr@sfasu.edu">nixonhr@sfasu.edu</a>	936/468-3973	12/4/2019	18	Complete
6	Stephen F Austin State Univ	H Rachele Garrett	<a href="mailto:nixonhr@sfasu.edu">nixonhr@sfasu.edu</a>	936/468-3973	12/5/2019		Complete
	Tarrant County College District	Jolynn Sprole	<a href="mailto:jolynn.sprole@tccd.edu">jolynn.sprole@tccd.edu</a>	817/515-4563	3/20/2020	Cancelled due to COVID	*
	Tarrant County College District	Jolynn Sprole	<a href="mailto:jolynn.sprole@tccd.edu">jolynn.sprole@tccd.edu</a>	817/515-4563	3/27/2020	Cancelled due to COVID	*
	Texas A & M - Corpus Christi	Jeannie Gage	<a href="mailto:kayla.lopez@tamucc.edu">kayla.lopez@tamucc.edu</a>	361/825-3476	4/20/2020	Cancelled Due to COVID	*
7	Texas A & M Univ College Station	Dawn Coleman-Glen	<a href="mailto:dcoleman@tamu.edu">dcoleman@tamu.edu</a>	979/458-5397	11/8/2019	55	
8	Texas Christian University	Trudy Conner	<a href="mailto:t.conner@tcu.edu">t.conner@tcu.edu</a>	817/257-7858	10/9/2019	27	Complete
9	The Alamo Colleges District	Ashley Brooks	<a href="mailto:abrooks30@alamo.edu">abrooks30@alamo.edu</a>	210/485-0620	11/15/2019	57	Complete
10	Univ of Texas Arlington	Ashton James	<a href="mailto:ashton.james@uta.edu">ashton.james@uta.edu</a>	817/272-3568	2/27/2020	50	Complete
	Univ of Texas Austin	Kevin Armalay	<a href="mailto:financialwellness@austin.utexas.edu">financialwellness@austin.utexas.edu</a>	512/475-6239	11/12/2019	Cancelled low registration	*
						<b>Total Attendees</b>	<b>296</b>

## Workshop Evaluations

Angelo State University Evaluations from their Workshop 10/1/2019	20	Attendees					12	Evaluations				
Training was well designed and content/materials were appropriate	5	5	5	5	5	5	5	5	5	5	5	5
<ul style="list-style-type: none"> <li>Good Clarification for unique circumstances</li> </ul>												
New Knowledge and skills were acquired in the training	5	5	5	5	5	5	5	5	5	5	5	5
I will use knowledge gained	5	5	5	5	5	5	5	5	5	5	5	5
What Key Facts did you learn:												
How to help parents and students complete the FAFSA												
Web Application, Dependent definition, Who is a parent info												
Cleared up a few things here and there												
I got contact info for when I get stuck.												
Process for completing FAFSA, options available												
How to complete the FAFSA, to not be intimidated by process, tips for success												
How do you plan to use:												
FAFSA Night, Helping students complete the FAFSA												
Will use to educate parents and students during open house												
Will use info in financial aid meetings												
I work with all Seniors so I will use this info with them												
Assist & provide guidance to students and families completing the FAFSA												
FAFSA Night for Seniors and Dual Credit kids												
Other comments:												
This Training was GREAT!!!!												
Thank you for having this training for us! Keith does a wonderful job!												

## Alamo Colleges District Evaluations

Number of attendees	57
---------------------	----

Rate Sessions on scale of 1-10	1	2	3	4	5	6	7	8	9	10	Total
AlamoPROMISE Overview							2	4	7	30	43
Getting Started! Completing the FAFSA for 2020-2021							2	3	8	30	43
Who is the parent? Determining Dependency Status								2	7	34	43
I've completed the FAFSA what now? After the FAFSA and Next Steps							1	3	10	29	43
Counseling Undocumented Students and the TASFA						1		2	8	32	43

What were your three favorite presentations?	Total
AlamoPROMISE Overview	22
Getting Started! Completing the FAFSA for 2020-2021	17
Who is the parent? Determining Dependency Status	23
I've completed the FAFSA what now? After the FAFSA and Next Steps	10
Counseling Undocumented Students and the TASFA	29

Was this training beneficial to you?	Total
Yes	42
No	1
Why?	Good info, don't use with my job

Would you recommend this training to others?	Total
Yes	43
No	0
Why?	

On a scale of 1-10 with 10 being the best, how would you rate our training and your experience today?	1	2	3	4	5	6	7	8	9	10	Total
					1			2	9	31	43

Was there any information that you wanted covered that was not included?
How funds are determined when multiple grants/scholarships exist
More AlamoPROMISE info
Maybe an actual small training on how to complete FAFSA form
Thought it would be broken down into sessions to choose from. It was different than past FA trainings
Enrollment coaches, strategies that they created to support AP students
Having the chance to do the FAFSA demo would have been great. A hands on workshop would be beneficial
Common law marital status
Student perspective would be beneficial
More info about determining funding other than loans
Thank you for doing a great session on undocumented and DACA students

## Texas Christian University Evaluations

### Was this training beneficial to you?

Yes	27
No	0

### Would you recommend this training to others?

Yes	27
No	0

### What information did you believe was most helpful to you in assisting students/parents? (number of comments referenced this topic)

Undocumented Section	9
Independent/Dependent status on FAFSA	9
Parent information	4
TASFA Information	6
New 1040 Format (would like sample)	4
FAFSA and other situation questions	10
Award Letters	4
Mike Scott Presentation	4
Q & A	4
Behind the Scenes Information	3
Overview Session sessions of Financial Aid and Admissions	5
Loans	3
Outside Scholarships	3
IRS Issues within FAFSA	3
What you need to know	3

### On a scale of 1-10 with 10 being the best, how would you rate the training provided today?

Score	Number
10	9
9	8
8.5	2
8	5
7	2
6	1

### Concerns

Repetitive Information	2
Too cold in the room	1
Shorten workshop time/serve lunch	2
More helpful for newer advisors/counselors	1
Some typos FAFSA was FASFA	1

### Was there any information that you wanted covered that was not included? (number of comments referenced this topic)

More TASFA information	1	Step-by-step on FAFSA	1
More Q & A and situational scenarios time	1	What is in the control of the HS and what is not	1
Comparison between new 1040 and old 1040	1	More information on grants, eligibility, criteria other than PELL	2

# ELECTRONIC TRAINING TASK FORCE

---



## Task Force Leader

Christina Pikla  
Trinity University

## Task Force Members

---

Melissa Bohnsack  
Texas A&M University

Jason Edens  
Austin Community College

Leandra Garcia  
St. Mary's University

Christy Miller  
Wayland Baptist University

D. Ingram  
University of Texas  
Southwestern Medical Center

Fabian Vasquez  
Texas Tech University Health  
Sciences Center

## Task Force Activity

The task force convened to discuss training opportunities for the membership due to COVID-19 restrictions. Discussions were framed with the lens of access and remaining relevant—key themes during Lyn Kinyon's presidency—in discussing electronic training opportunities.

How does TASFAA remain relevant, especially in the midst of a global pandemic (very uncertain times)?

## Ideas Discussed

- Virtual Training Packages
  - Expands access to administrators of all levels
    - Allows a pipeline of succession training
    - Access for assistant/associate directors to learn
    - Training for new FA professionals - networking with seasoned professionals - solidifies pipeline of industry professionals
  - Lower price point for impacted budgets
- Combined Approach: NAOW/ABC Training with Mentor Protege Program (possibility for exciting synergy)
- Break out session functionality in Zoom allows for group and breakout sessions
- Pre-recorded webinars
  - Flexibility in when to view
  - Training opportunities for new employees
  - Anticipate that travel and training budgets will be impacted through the next cycle

- Regional Training
  - Content can be delivered as 1 module
  - Pre-recorded is an option
  - Have scheduled times with THECB for a live Q&A session
- Live webinars: pop-up topical sessions based on interest/needs of the membership, as well as structured training
  - NAOW: some elements pre-recorded; others live (blended/module approach)
  - Regional Training
  - ABC Workshop
  - Fall Conference
    - Panel discussions
    - Breakout sessions
      1. Birds of a feather
      2. Happy Hour
      3. Multiple tracks: director, aspiring director, new to FA, etc.
    - Interactive polls - keeps audience engaged
  - Still allows for networking. This is one of the major value add components of the conferences.
- Logistical Considerations - Virtual Trainings and Conference
  - Registration platform
  - Pricing models for membership
  - Timing of events
  - Poll the membership for content, timing of delivery, etc.
  - Volunteer availability
  - Tech costs

## Pending Activity

None

## Board Action Requested

None

## Comments

The president-elect will consider the role of the task force in future efforts to provide multimodal training opportunities. It was agreed upon that there is value in bringing together chairs and vice chairs from key areas such as Regional Training, Web Services, Member Protégé, etc., to combine efforts towards this shared goal.

# FALL CONFERENCE COMMITTEE

---



## Committee Co-Chair

Dede Gonzalez  
Texas State University



## Committee Co-Chair

Michelle Toney  
University of Texas at Arlington

## Committee Members

---

D. Ingram  
University of Texas  
Southwestern Medical Center

Alberto Hernandez  
Texas A&M University –  
Corpus Christi

Cathy Sarabia  
Texas Tech University

Yvette Hernandez  
Southwest Texas Junior College

Becky Hubbard  
Cognition Financial

Nick Martinez  
Inceptia

Eddie Sanchez  
Texas Tech University

Vanessa Negrete  
Texas Tech University

Zarita Barton  
Lone Star College

Dominique Candley  
Houston Community College

Norma Belmares  
Texas State University

Nora Cargo  
Texas A&M University

Lisa Dickson  
Texas State University

Eileen Eiden  
Austin Community College

Christine Gauger  
University of Texas at Austin

Sergio Gonzales  
Sallie Mae

Kristi Wolfe  
University of North Texas  
Health Sciences Center

Roxanne Garza  
Vista College

## Committee Activity

The Fall Conference committee was ready and excited to plan our Fall conference this year. The committee met via conference call several times. We decided on subcommittees, selected a theme and logo, secured a key note speaker and were making great progress on preparing for the conference and then COVID-19 hit. We contacted the Wyndham hotel about options regarding the need to cancel the fall conference. We opted to move the conference to October 2022. The president Lyn worked with the hotel on signing a new contract with the Wyndham and paying the 50% deposit required. The keynote speaker was contacted and agreed to move to the October 2021 conference.

# FINANCE COMMITTEE

---



---

## Committee Chair

Lyn W. Kinyon  
University of Texas at Arlington

## Committee Members

---

Taryn Anderson  
University of Dallas

Fabian Vasquez  
Texas Tech University Health  
Sciences Center

Tia Clary  
CoNetrix

Gary Rodgers  
Rodges Capital

## Committee Activity

The committee had the following activities during the 2019/2020 TASFAA year:

- Developed and presented the operating budget to the Board for approval.
- Monitored needed changes to the operating budget for presentation to the Board.
- Supported the activities performed by the Treasurer and Bookkeeper.
- Considered recommendations made by the Investment Advisor.
- Reviewed financial reports monthly and quarterly.
- Prepared and provided justifications/rationale for budget peculiarities due to special circumstances during the 2020 year and the restrictions caused by the pandemic.

# LEGISLATIVE ISSUES COMMITTEE

---



## Committee Chair

Cynthia Butler  
Dallas College

## Committee Members

---

Delisa Falks  
Texas A&M University

Alan Pixley  
Collin College

Traci Armes  
University of Texas at Austin

Joseph Ruiz  
Del Mar College

Jimmy Parker  
Panhandle-Plains Higher  
Education Authority

Cathy Sarabia  
Texas Tech University

Vanessa Negrete  
Texas Tech University

Zelma DeLeon  
University of North Texas

Holly Nolan  
University of Houston Clear Lake

Chesa Donovan  
Global Financial Aid Services

## Committee Activity

### First Conference Call Meeting was held December 16, 2019

Participants included Cynthia Butler, Traci Arms, Jimmy Parker, Joseph Ruiz, Bryan Ashton (Guest), Chesa Donovan, Zelma Deleon, Alan Pixley, Holly Nolan, Vanessa Negrete, Cathy Sarabia  
Focus: Keep Membership up to date on legislative information, position papers, current bills, keep state of TX Legislative items in mind, working with FAAC Legislative subcommittee to prepare for next legislative year

### NASFAA's Leadership & Legislative Conference & Expo February 3-7, 2020

Three TASFAA groups participated in the following Capitol Hill Visits:

#### Group 1 - Senate

Taryn Anderson - Samara Brown (Senator Cruz), Kaitlyn Montan (Congressman Castro)  
Cynthia Butler - Claire Sanderson (Senator Cornyn), Kaitlyn Montan (Congressman Castro)  
Debra Knighten - Claire Sanderson (Senator Cornyn), Kaitlyn Montan (Congressman Castro)

D.Ingram - Samara Brown (Senator Cruz), Kaitlyn Montan (Congressman Castro)

#### Group 2 - House of Representatives

Jason Edens - Sabrina Hancock (Congressman Roy), Evan Bender (Congressman Carter), Adam Golden (Congressman Doggett)

Vanessa Verstuyft- Sabrina Hancock (Congressman Roy), Evan Bender (Congressman Carter), Adam Golden (Congressman Doggett)

Lonnie Rodriguez - Sabrina Hancock (Congressman Roy), Evan Bender (Congressman Carter), Adam Golden (Congressman Doggett)

Group 3 - House of Representatives

Shanetta Burke - Courtney Broderick (Congresswoman Garcia), Madison Hardimon (Congressman Wright)

Tanika Aggison - Courtney Broderick (Congresswoman Garcia), Madison Hardimon (Congressman Wright)

Justin Silcox - Courtney Broderick (Congresswoman Garcia), Madison Hardimon (Congressman Wright)

### **February 20, 2020 – 2:00-3:00 PM Conference Call Meeting**

Committee Participants:

- Delisa Falks – Vice Co-Chair
- Traci Armes
- Chesa Donovan
- Joseph Ruiz
- Jimmy Parker
- Cynthia Butler - Chair

Guest:

- Bryan Ashton

Cynthia Butler – NASFAA's Leadership & Legislative Expo Update:

- More than 370 financial aid professionals attended
- Four pathways are available for participation
  - Advanced Topics in Financial Aid Leadership
  - Compliance Management
  - Association Leadership
  - Strategic Enrollment Management
- Justin Draeger's Legislative Update:
  - Congress is slowly working towards reauthorization of HEA
  - Bipartisan support for higher education issues such as FAFSA Simplification, loan repayment simplification, & institutional risk-sharing models
  - Topics without support from both sides, streamlining student aid programs, free college for two-year institutions, & moving to one grant, one loan model

- Praise for Department's recent efforts at FSA for new chatbot (Aidan), NextGen PPO, and FSA ID continued improvements
- Stressed that we should acknowledge their progress to push for solutions to outstanding issues
- Megan Coval's NASFAA Update:
  - NASFAA advocacy to codify standardization language in institution's aid offers, but allow flexibility for unique student populations
  - HEA bill most likely will eliminate origination fees
- Capitol Hill Visits:
  - Please see attachment from the TASFAA Board Meeting

Bryan Ashton – Trellis Company – Federal & State Update:

Federal - Legislative:

- House Democrats are hopeful to move the College Affordability Act (CAA) to the floor sometime this spring. While the bill will likely not pass, it is important to pay attention to the various provisions that are included. A CRS brief on the bill is attached to this email.
- Senate staff continue to work on a reauthorization bill for HEA. Conversations are on-going, but historical sticking points (particularly Title IX) remain. Optimism is fading that anything will be able to see the floor in the Senate.
- The President announced his budget earlier this month. While the budget is message only at this point, it does continue to propose massive cuts to education. This budget is expected to be largely ignored by the Congress, but various other challenges likely position us to see a Continuing Resolution through the election.
- The Secretary is expected to testify in front of the House next Thursday at 10 am about ED's budget.

Federal - Administration:

- FSA continues to work extensively on NextGen and is beginning to roll out new features that are both school and student facing. Expect there to be a steady stream of modernization updates over the next year including to counseling modules, partner portals and the mobile app.
- There is a desire by FSA to attempt to pilot the data sharing provisions of FUTURE in the coming academic year, with a full roll out the following academic year. Senior ED officials are hedging and indicating that there may be some issues with the data sharing process that need to be ironed out.
- The Annual Student Loan Acknowledgement is still up in the air. Some additional questions have been answered and are available [here](#). More questions about timing,

implementation guidance and distribution pipelines are outstanding. This will likely not replace the state debt letter requirements.

- FSA recently released a large data dump on the loan portfolio. More information is available [here](#).

#### State - Leg / THECB:

- Increasing interest in formula funding, taxing and tuition caps in the legislature as we head into the next session.
- Major leadership changes announced at THECB. The announcement can be found [here](#) and the new org chart can be found [here](#).

#### Delisa Falks – Inaugural Executive Roundtable

- 48 participants
- Ted Mitchell (president of American Council on Education (ACE) gave opening remarks
  - Concern over negative narrative around the value of a college education
  - Graduation and completion rates
- Future of financial aid discussions
- General Mark Brown (FSA COO)
  - Importance of the voice of the financial aid profession
  - How aid administrators can work with FSA to best serve students
    - Transparency
    - Efficiency
- NASPA President Kevin Kruger
  - Mental Health issues
- Pat McGuire – President of Trinity University (DC)
  - The need for financial aid professionals to be advocates for new student success measures

#### Jimmy Parker – PPMSC

- Reminded everyone concerning the proposed rules on the changes to the student loan debt disclosure requirements were published in the February 7, 2020 Texas Register. These changes are a result of the passage of SB 241 during the last legislative session that clarified private loan information does not need to be included in the debt disclosure letter sent to students.
- Discussion was brought up indicating the House Education and Labor committee may look to move the College Affordability Act in the committee sometime in April 2020. This is the democrat version of a bill concerning reauthorization of the higher education act. One update we have received is that democratic leadership in the

House has not really talked about this bill and this makes some think it may not move this year and may be delayed until after the election.

- Discussed the need to determine from the membership any potential changes to state financial aid programs so we can be working on information about the proposed changes and determine legislative sponsors prior to the next legislative session.

### **April 16, 2020 Legislative Issues Committee Meeting**

Discussion on CARES with committee and Bryan Ashton in preparation for the Online Panel Discussion:

#### **Clarification on Student Emergency Aid Elements:**

- 50% of institutions have completed the application. ED urges the remainder of institutions to apply as quickly as possible.
- Students that were enrolled exclusively online as of March 13th, 2020 would not be eligible for student emergency aid
- Students must be Title IV eligible to receive these funds. This will likely exclude undocumented students and international students
- Institutions cannot use the funding to pay for student balances
- Institutions cannot use the student portion of funding to reimburse themselves for refunds or technology provided
- Institutions may be able to use this funding to support emergency aid distributed to students after 3/27 pending the requirements in the FAQ are met
- These funds cannot be used to pay student workers, but other programs are available to support that

#### **Institutional Aid Portion of Funding:**

##### *Process*

- The balance of the relief fund (institutional funds) are available and will be submitted through grants.gov and distributed through G5. ED-Grants-042120-004

##### *Eligibility*

- Institutions must have completed the Certification and Agreement for the student funding to be eligible for the institutional funding.
- Institutions must fill out a separate Certification and Agreement to receive the institutional funding

##### *Fund Usage*

- Institutions may, but are not required, to utilize some of these funds to support student emergency aid. In the case that institutions choose to reallocate funding to the student portion, the same rules for distribution of the student funding would apply.

- The Secretary urges as much funding as possible to students, especially if the Recipient has significant endowment or other resources available.
- Institutions cannot use the institutional funding to pay contractors for provisions of pre-enrollment activities (marketing, advertising), endowment/fundraising activities or capital outlays for facilities related to athletics, sectarian instruction or religious worship.
- Funds must be spent for costs that have a reasoned basis for concluding have arisen by significant changes to delivery of instruction due to COVID-19.
- Institutions can use the funding to reimburse itself for costs related to refunds made to students for housing, food or other services that the institution could not provide.
- Institutions can also use the funding for hardware, software, or internet connectivity that the institution may have purchased on behalf of students.
- Institutional costs must have first been incurred on or after March 13th, 2020.
- Institution cannot use this funding to pay the following: senior administration/executive salaries, benefits, bonuses, contracts, incentives, stock buybacks, shareholder dividends (etc.)

#### *Examples of Allowable Usages (Provided During Call)*

- Institutions can utilize the funding to expand remote learning programs, enhance IT infrastructure, train faculty and staff
- While refunds can be covered from this funding, these dollars should not be placed directly on the students account.
- Institutions cannot use these funds to pay down balances or create scholarships, but they can be used to fund fees that are a result of a new fee that has been added to a student's account due to the transition to online learning (technology fees etc.). This is only for the institutional portion of the fund.
- Institutions can use the funding for OPMs and other providers on a per student basis, but cannot use for marketing, recruitment etc. Bundled arrangements are not acceptable.

#### *Reporting*

- Funding shall be reported to the Secretary on a quarterly basis and additional reporting may be required. This may include (but is not limited to) reporting on the use of funds including accounting for the amount of reimbursements to the institutions related to refunds made to students for housing, food, or other services and describing any internal controls the institution has in place to ensure that the funds were used for allowable purposes and in line with cash management principles.

- Institutions are invited to keep detailed records and more information will be published in a notice on the Federal Register related to the reporting requirements
- These funds should be used within one year of the Certification and Agreement being signed.

### **Relevant Documents:**

[FAQs on Emergency Financial Aid Grants to Students](#)

[Cover Letter for Institutional Portion of Aid](#)

[Certification and Agreement for Institutional Purpose](#)

[Allocation for Institutional Portion](#)

[FAQs on the Institutional Portion of Aid](#)

The link for general ED information is available [here](#).

### **May 4 & 6, 2020 CARES & HEERF Online Panel Discussion**

Organized a panel of financial aid experts from around the state who shared their collective knowledge regarding CARES Act provisions and the Higher Education Emergency Relief Fund (HEERF). This panel clarified rules, discussed issues, and addressed questions submitted with registration. Panel discussion was hosted by Trellis Company via Zoom video conferencing. Events were broken into two- and four-year institutions in order to accommodate sector questions and concerns. Panel consisted of:

- JoEllen Soucier / Houston Community College System - Executive Director, Financial Aid
- Karen Krause / University of Texas at Arlington - Executive Director, Financial Aid
- Delisa Falks / Texas A&M University at College Station - Assistant VP, Financial Aid
- Bryan Ashton / Trellis Company - VP, Community Investment & Government Affairs
- George Torres (retired) / TG/Trellis Company – Congressional Affairs

### **June 18, 2020 Legislative Issues Committee Meeting**

Bryan Ashton gave a legislative update of the following:

- We may see additional HEERF relief – possibly by July/August with another bill passage
- Student loan repayment benefits are possible through the end of the fiscal year, but will not remain effective in the next fiscal year
- Lots of “whiplash” with regards to COVID-19 guidance
- Due to the California and Washington lawsuits, congress may be more inclined to step up involvement
- Appropriation bills about to occur – possibly this week or week after – movement past this may be slow
- Growing frustration with the Department of Education on the hill and pressuring Department with regards to guidance on CARES Act

- Jimmy Parker added his agreement with Bryan's statements and added the following:
- Parity bill with regards to student loans to include FFELP and Perkins

Delisa Falks stated that not much will take place on State Legislation until this fall. Bryan and Jimmy concurred.

After the federal and state updates, we discussed disseminating a Legislative Update for the association that Bryan, Jimmy, and Cynthia agreed to provide a draft for committee review and approval.

### **August 20, 2020 Legislative Issues Committee Meeting**

From Bryan Ashton:

- A lot of talking is going on, but at the same time, not a lot is going on in terms of documents
- There is a delay passing any other COVID-19 bills – House & Senate are on their August recess
- Executive order by Trump has created uncertainty and ambiguity, but there is intent to continue loan provisions, and hopefully this includes Public Loan Forgiveness, guidance is still needed on implementation
- There is a continued push for liability protection for colleges and universities and funding to support the increased expenses they are incurring in bringing individuals back to school
- Both the House and Senate are working to attach COVID provisions to other pieces of legislations giving hope for a COVID-4 bill to be passed prior to the election. Any bill would likely include a Continuing Resolution to fund the government through at least the election
- The Texas House has issued RFI's on their interim charges (in place of in person hearings). More information is available [here](#). Of note to TASFAA is [Interim Charge 3](#) (60x30TX), [Interim Charge 1](#) (including dual credit and transfer policy) and the [Pandemic Related Charge](#).

Just in from Bryan this afternoon:

Quick update - ED released this press release:

- Automatically suspended until Dec 31st - no action needed
- Federally held loan collections are still halted
- Payments will count toward PSLF and IDR forgiveness clocks
- Servicers have been engaged in making relevant changes / communications and they should be reflected in accounts over the next few weeks

<https://content.govdelivery.com/accounts/USED/bulletins/29b4634>

### **October 15, 2020 Legislative Issues Committee Meeting**

Meeting consisted of a discussion regarding a final Legislative Update to be disseminated by Jason Edens for the TASFAA community. Outcome – produce a draft update by October 21, 2022 for committee review and consideration. Finalize by October 22, 2020 and forward to Jason for dissemination before end of fiscal year.

# MEMBERSHIP COMMITTEE

---



---

## Committee Chair

Keith Hoelscher  
Angelo State University

## Committee Members

---

Molly Garrett  
Tyler Junior College

Donnie Purvis  
Weatherford College

Ana Chavez  
Collin College

Yolanda Jamison  
Sam Houston State University

## Committee Activity

The Membership Committee consisted of Donnie Purvis (Past Chair), Molly Garrett, Ana Chavez, and Yolanda Jamison. We started off early navigating the new database getting invoices out and adjusting to the new system. We sent out renewal reminders and worked with schools and vendors answering questions and updating membership rosters. We ended the year at 128 institutions and 30 vendors with revenue of \$39,000.00. There were several new schools and vendors that joined the TASFAA family giving a total of 2,294 members. I continue to work with Molly Garrett, the new chair of the membership committee, to ensure a smooth transition and insight from what we learned over the past year.

# MEMBERSHIP FEES & STRUCTURE TASK FORCE

---



---

## Task Force Leader

Delisa Falks  
Texas A&M University

## Task Force Members

---

Michelle Toney  
University of Texas at Arlington

Jael Perez  
University of Texas Rio Grande Valley

Zelma DeLeon  
University of North Texas

## Task Force Charge

TASFAA Task force for review of fee structure

## Task Force Activity

The task force searched websites and reached out to states for information that was not available on their websites to compile data. In some cases, we could not find information on websites and were unable to receive responses. We did not look at all 50 states.

The task force was able to obtain from websites or emails information from 19 states to assess their fee structure for membership, conferences and workshops.

## Membership Fees

- 5 of the 19 state associations have a tiered approach.
- For those that use the tiered approach there is no additional benefits provided to the institutions with a higher number of enrolled students.
- 11 of the 19 have membership fees at \$200 or less per institution.
- A tiered approach would require a more thorough review of TASFAA members institution sizes to assess an approach to present to the board. That was our intent right before spring break, however COVID-19 happened and the task force members did not believe it was a good time to send out a survey to TASFAA members, due to the total interruption of our personal and professional lives.

## **Annual Conferences**

- The majority of the associations charge in the range of \$225 to \$375 for members.
- Most non-members pay a slightly higher and most have a late registration fee, or on-site registration fee that is a bit higher than their regular conference rate.

## **Training**

- Trainings outside of their annual conference for many states do not have a charge, for those who do charge for their trainings, the charge is minimal \$75.00 or less. It does not appear that many of the states provide a training as comprehensive as our New Aid Officers workshop.

## **Vendor Sponsorship**

- In review of the vendor charges they range widely-most provide the option of a table at their annual conference, some with one complimentary registration at approximately \$1000.
- About 3 states have a tiered approach for vendors-Gold, Silver, and Bronze level sponsorship. The cost varies per state for tiers.

## **Recommendations-**

The Task Force does not recommend any adjustments to the current membership fees at this time. The decision for this recommendation is due COVID-19; some member institutions have already experienced hiring freezes and budget cuts, we believe there will be more to come across the state. It is an uncertain time for members and we do not believe it would be respectful of the TASAA Board to propose a change in the fee structure or membership fee in general at this time.

If and when the TASFAA board is ready to review this again; we recommend a survey out to TASFAA voting members to get input on options. We were just starting to work on possible survey questions in early March, however when COVID-19 hit which was right about the same time we were working on the survey, we did not believe it was appropriate to move forward with the survey.

Many of the voting members from the institutions were inundated with increased workload on their campuses. We did not believe the survey would be first on the priority list. We also did not want the members to be concerned at that time of a membership fee increase.

We recommend also reaching out to our sponsors via a survey to determine their preferred way of supporting TASFAA. A tiered approach, and we determine where to use the money? A la carte and provide options? In review of the other associations, it varies.

# MENTOR/PROTÉGÉ COMMITTEE

---



---

## Committee Chair

Rachael Fournier  
University of Texas at Arlington

## Committee Members

---

Kadedra Green  
Dallas College

## Committee Purpose

The Mentor/Protégé Task Force was created to help TASFAA members network and connect to each other in a mentoring relationship.

## Committee Activity

In March 2020, the world as we knew it, came to a screeching halt. The COVID-19 pandemic had reached global levels that caused the work environment to change; essentially overnight. The workplace transitioned from physical, shared buildings to blended, individual home/workspaces. The family unit became part of the work unit via electronic platforms. The lines of separation blurred and become part of the conversational evolution about the task force, as outlined below.

### Initial Actions: Pre-Pandemic

- Met virtually with Kadedra Green from Dallas College (formerly Dallas County Community College) to discuss how we could link new members and/or members that are looking to advance to the next level, to other TASFAA members that have experience in these areas
  - The conversations centered around the need for joint processes of in-person and virtual opportunities

### In-person Opportunities

- Embedding mentor/protégé meetings at in-person events

- Annual Conference
- New Aid Office Workshops (NAOW)
- ABC Workshops
- Regional Training
- Complete optional skills profile as part of the survey process(es)
- Attend in-person events to help speak about the program and arrange breakout sessions to network and meet each other in person

### **Virtual Opportunities**

- Use existing web platform to allow protégés to request mentors
- Have mentors complete a skills and interest profile
- Purchase matching software that would link profiles, match mentors/protégés and track communication(s)
- Provide general, topic-driven training options via the task force
  - Professional development options
  - “Brown Bag” lunch and learns
  - Current events – policies and discussions

### **Outcomes/Recommendations**

At the submission time of this report, a vaccination for COVID-19 has not been released. A mix of businesses in different industries, including Higher Education, have seen the cost-savings associated with not maintaining a permanent building and will remain hybrid or remote long-term or permanently. The context in which work has been done was and is evolving rapidly. In response to this shift, the TASFAA Board voted to suspend any in-person events for the entirety of the 2019-2020 year.

As with any change, there are opportunities to look at processes and see what can be improved. After going through the transition to remote work as an industry, a nation and a global economy, the need for agility in processes has become clear. In alignment with this transition, the task force recommends combining the following for the Mentor/Protégé Task Force:

1. Partner with existing Training Committee, Regional Training and Web Services (at the time) Committees to have mentoring be part of the overall goal of each – equates to combined resources and minimizes duplication of effort
2. Have committee chairs meet quarterly to share platforms they are using and discuss cross-over activities
3. Phase in the following protocols over time:
  - a. Phase I: use the website to collect updated, current membership information

- i. Build this into the annual communication flow twice annually to have organizations update their membership information
  - ii. Send list of current member affiliates (merge style) associated with their organization along with a link to the section to correct it
  - iii. Include information on how to reset their password
- b. Phase II: Leverage Internal Communities/Circles
  - i. Use current website software to determine how many circle communities have been created in the software
  - ii. Pull from the groups the titles that are present in the circle communities
    - 1. See where the gaps are in the succession plan (i.e. All directors?)
    - 2. Look for geographic gaps in the circle communities
  - iii. Poll the 2 Groups
    - 1. Group \*\*: those that are part of a circle community
      - a. What additional, professional development topics would be helpful?
      - b. Where do you think the gaps in programming are?
      - c. What could be done to help solidify succession planning in the industry?
    - 2. Group++: those that are NOT part of a circle community
      - a. Same questions as above
      - b. Add questions regarding what topics would be engaging to them
      - c. Find out what types of skills (not just FA knowledge) that they feel they are needing
        - i. This may lead to co-curricular tracks at in-person and virtual events, which will be the connection point for new mentor/protégé interactions
- c. Phase III: Implement Mentoring Software
  - i. Partner with Web Services (name at time) to determine which software options will support and interface with current system
  - ii. Complete a communications plan, including text, dates, etc.
  - iii. Co-launch at in-person events and a virtual kickoff event
  - iv. Track metrics in system
  - v. Follow up with mentees after initial quarter
  - vi. Survey participants about what worked, needs improvement, etc.
  - vii. Make adjustments based on feedback and prepare process improvement metrics for the next cycle

# NASFAA CREDENTIALING COMMITTEE

---



## Committee Chair

Christy Miller  
Wayland Baptist University

## Committee Members

---

Nathan Wall  
Texas Tech University

Due to the lack of training events caused by COVID-19, there is no report for this committee.

# NOMINATIONS & ELECTIONS COMMITTEE

---



---

## Committee Chair

Karen Krause  
University of Texas at Arlington

## Committee Members

---

Robert Merino  
San Jacinto College

Eileen Eiden  
Austin Community College

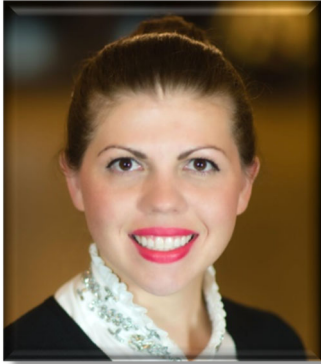
Traci Carter  
Texas Tech University

## Committee Activity

The Nominations and Elections Committee began our work in March. Eileen Eiden and Robert Merino served on the committee with me this year. We solicited nominations from the membership and were pleased with the high number and quality of nominees we received. We met and narrowed the list and then contacted each potential nominee to be sure he/she was still willing to serve. We then sent the ballot to the membership, and voting was done electronically. In early September, we announced those who had been elected to serve for the coming year. I highly encourage members to volunteer for TASFAA committees as I believe you will find the experience quite rewarding.

# REGIONAL TRAINING COMMITTEE

---



## Committee Co-Chair

Melissa Bohnsack  
Texas A&M University



## Committee Co-Chair

Leandra Garcia  
St. Mary's University

## Committee Members

---

Rachel Fournier  
University of Texas at  
Arlington

Julie Wittmis  
Texas Woman's  
University

Ed Kerestly  
Angelo State University

Roxanne Garza  
Vista College

Michelle Enriquez  
Citizens Bank

Chandra Gonzales  
University of Houston

Arianna Gray  
Collin College

## Committee Activity

TASFAA Regional Training planning took place for 2020 up until mid-March. Due to the COVID-19 pandemic all planning ceased, and trainings at each location were canceled. The locations planned on were: El Paso Community College, University of Houston Sugarland, St. Mary's University, Colling County Community College – Plano Campus, and Texas Tech Innovation Hub.

This year's topic would have been Professional Judgment, and we would have included state and federal updates.

We were originally given a budget of \$9,000 in funding from TASFAA but were dropped down to \$6,000 after the cancellation of trainings. Our ending budget remained \$6,000 with no expenses incurred for travel or cancellations. Unfortunately, \$500 of the NASFAA Credentialing Committee budget were used for the Professional Judgment credential. We were unable to recoup these funds nor were we able to use the credential option for a later date due to changes in the testing process.

We are saddened that Regional Trainings were not provided, but we are grateful to all volunteers who helped us for as long as they could. Our hope is that for 2021 there is a better outlook for Regional Training.

# SITE SELECTION COMMITTEE

---



---

## Committee Chair

Marcus Wilson  
Texas Tech University  
Health Sciences Center

## Committee Members

---

David Orsag  
University of Mary Hardin-Baylor

D. Ingram  
University of Texas  
Southwestern Medical Center

Sergio Gonzales  
Sallie Mae

Taryn Anderson  
University of Dallas

## Committee Activity

The committee was quite busy this year working to identify properties around the state that are suitable for TASFAA to hold events with. Having a broad list of contacts and properties knowledgeable of us and our needs as well as us having solid information about their capability's will make future efforts a bit easier. Toward that goal, we reached out to national and state contacts (convention bureaus, etc.) as well as properties we have utilized in the past. This pool exceeded 50 different groups.

Well that first goal was certainly met. Now, don't you know, all the rules have changed. What we may have needed in the past, most likely will not be what we are looking for in the future.

We continue to work with the properties that we are under contract with (or were under contract with). Things we need to know... When will we have our next in-person meeting? How many will attend? What is the best location? How can we work with those that have been so accommodating to us?

Some positive things, we know some of the questions to ask and feel like answers are beginning to be provided.

Thank you for allowing me to serve as the Chair for the Site Selection Committee.

# SPONSOR RELATIONS COMMITTEE & SPONSORSHIP OPPORTUNITIES TASK FORCE

---



---

## Committee Chair

Sergio Gonzalez  
Sallie Mae

## Committee Members

---

Craig Poleman  
SoFi

Michelle Enriquez  
Citizens Bank

Nick Martinez  
Inceptia

## Committee Activity

The Sponsor Relations Committee had several meetings beginning in April and throughout the year to discuss increase in Corporate Partners at the TASFAA Conference as well as finding additional sponsorship opportunities. We discussed reaching out to previous Corporate Partners that stopped exhibiting in prior years to understand why and try to get them to come back to Texas. We also had several meetings about revamping sponsorship opportunities for Corporate Partners to present to the Board. We were looking for a solution that benefitted TASFAA, but also accessible and attainable for all potential Corporate Partners. We decided on an A La Carte and Tier Sponsorship approach. We presented to the Board and was approved to have these changes in sponsorship for the upcoming year.

See tables below on updates to sponsorship.

<b>A LA CARTE SPONSORSHIP</b>		
<b><i>Website Advertising:</i></b>		
	Website Sponsor Link	\$ 2,500
	Blog Post Package	\$ 1,000
<b><i>2020 Annual Conference:</i></b>		
	Conference Exhibitor	\$ 1,000
	Conference Bags	\$ 850
	Conference Badges	\$ 750
	Conference Padboard Folder	\$ 1,200
	Conference Evening Event	\$ 800
	Conference Meal Sponsorship	\$ 1,000
	Conference Break Sponsorship	\$ 600
	Pre-Conference and ABC Workshop WiFi Sponsorship	\$ 200
	Conference One Day WiFi	\$ 200
	Conference Charging Station	\$ 200
	Conference Banner Ad on TASFAA Website	\$ 200
	Conference Blog Post	\$ 100
<b><i>Regional Training:</i></b>		
	Exhibitor	\$ 300
	Meal Sponsorship	\$ 200
	Break Sponsorship	\$ 100
	Banner Ad	\$ 100

## T I E R   S P O N S O R S H I P

Platinum	\$3,500	Gold	\$2,500	Silver	\$1,500
<ul style="list-style-type: none"> <li>• 1 Complimentary Registration</li> <li>• 1 Exhibit Space</li> <li>• Two Options:               <ol style="list-style-type: none"> <li>1. Five Regional Training Exhibit Opportunities <b>(or)</b></li> <li>2. Three opportunities to promote product/service on TASFAA ListServ</li> </ol> </li> <li>• Opportunity for Branding Opportunities* (\$200 credit)</li> <li>• Opportunity to present at conference-non product session</li> <li>• Opportunity to speak for 3 min at regional trainings</li> <li>• Send promotional item for ABC and New Aid Officer Training</li> <li>• Conference Registration List-3 Weeks Prior to Conference</li> </ul>		<ul style="list-style-type: none"> <li>• 1 Complimentary Registration</li> <li>• 1 Exhibit Space</li> <li>• Two Options:               <ol style="list-style-type: none"> <li>1. Three Regional Training Exhibit Opportunities <b>(or)</b></li> <li>2. Two opportunities to promote product/service on TASFAA ListServ</li> </ol> </li> <li>• Opportunity for Branding Opportunities* (\$100 credit)</li> <li>• Opportunity to speak for 3 min at regional trainings</li> <li>• Send promotional item for ABC and New Aid Officer Training</li> <li>• Conference Registration List-2 Weeks Prior to Conference</li> </ul>		<ul style="list-style-type: none"> <li>• 1 Complimentary Registration</li> <li>• 1 Exhibit Space</li> <li>• Two Options:               <ol style="list-style-type: none"> <li>1. One Regional Training Exhibit Opportunity <b>(or)</b></li> <li>2. One opportunity to promote product/service on TASFAA ListServ</li> </ol> </li> <li>• Conference Registration List-2 Weeks Prior to Conference</li> </ul>	

**\*Branding Opportunities would include the following:**

Website Annual Advertising-Homepage Ad

Blog Post - 4 per year

Conference Bags

Conference Badges

Conference Padboard Folder

Conference Pens

Conference Evening Event

Conference Meals

Conference Break

Pre-Conference and ABC Workshop WiFi Sponsorship

Conference One-Day WiFi

Conference Charging Stations

Conference Banner Ad on TASFAA Homepage

Conference Blog Post

# SWASFAA RELATIONS COMMITTEE

---



## Committee Chair

Ben Montecillo  
Texas Tech University  
Health Sciences Center

### Committee Activity

SWASFAA, like TASFAA and individual institutions, has been focused on navigating through the COVID-19 Pandemic.

SWASFAA has moved to virtual board meetings during 2020 and cancelled our Spring 2020 Mid-Level Training.

SWASFAA offered our members the opportunity for a virtual summer series on Compliance and Policy and Procedures. This was successful and the participants were able to exchange ideas and help one another with hot topics and best practices.

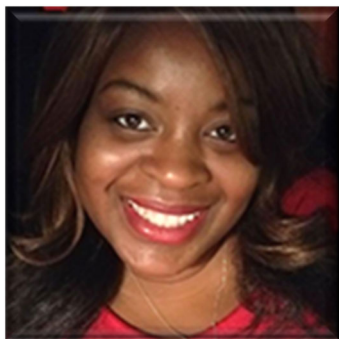
SWASFAA made the decision to host a virtual Fall Bootcamp (October 19<sup>th</sup> – October 22<sup>nd</sup>) and Fall Conference/Academy (November 4<sup>th</sup> through November 10<sup>th</sup>). We were able to partner with NASFAA for these trainings that were scheduled over several days to help make it easier for staff to participate. These were offered to SWASFAA members free of charge allowing as many staff to participate this year.

The SWASFAA Board of Directors also made the decision to return to Albuquerque, New Mexico in Fall 2021 for our Annual Fall Conference. This was originally planned to be in Fall 2020, but we were able to work with the Isleta Resort and Casino to allow us to move to Fall 2021. This will impact future conference sites by pushing back our conference rotation one year. Additionally, we hope to continue to partner with NMAAFAA for a joint conference in the Fall of 2021 at the Isleta Resort and Casino.

SWASFAA will continue to evaluate options for future in-person trainings and conference opportunities as we work towards our mission to enhance the professional development of financial aid administrators.

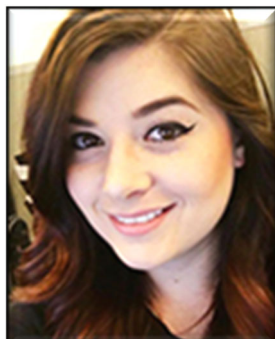
# TRAINING COMMITTEE

---



## Committee Co-Chair

D. Ingram  
University of Texas  
Southwestern Medical Center



## Committee Co-Chair

Mariah Fournier  
Dallas College

## Committee Members

---

Dawn Coleman-Glenn  
Texas A&M University

Steven Lewis  
University of North Texas

Zackary Kruger  
University of Mary Hardin-Baylor

Arianna Gray  
Collin College

Kathleen Brown  
Southern Methodist University

## Committee Activity

Greetings from the 2020 TASFAA Training Committee,

What a year – and where to begin?

Over the past months, we have faced extraordinary circumstances, have established new norms, and have dived headfirst into virtual reality. Due to COVID-19, the TASFAA Board elected to cancel the 2020 New Aid Officer Workshop and the 2020 ABC workshop for the health and safety of the attendees, volunteers and event workers.



The New Aid Officers workshop was scheduled for April 22-24, 2020 at Great Wolf Lodge (Grapevine, TX). Our planned theme was "Surviving the Wilderness of Financial Aid", with an emphasis on providing a "survival kit" of knowledge to help navigate through the frontier that is Financial Aid. We developed marketing materials and launched our website; we were well on our way to a successful event with 44 registrations. By early March, the COVID-19 cancellations started rolling in and it became apparent that the event would need to be cancelled. All refunds were processed and confirmed.

There were no expenses nor revenues to report as a result.

The ABC workshop was scheduled for October 6 -7, 2020 to proceed the fall conference. Although attempts were made to pivot to a virtual format, we decided to cancel the event due to a lack of volunteer participation bandwidth and virtual platform availability.

With that being said, I would like to say a special thanks and give recognition to the wonderful volunteers that make up your 2019-20 Training committee. They all volunteered countless hours creating marketing material and graphics, organizing the agenda, securing guest presenters, and working out location logistics for this event and are deeply saddened to not have to the chance to share it with you all. I encourage everyone to consider volunteering again in 2020 – 2021. Mariah and Dawn will be the co-chairs of the training committee and would love your support. They will be focused on developing the digital and virtual structure to enhance TASFAA's training outcomes.

It has been my utmost pleasure and honor to have served the TASFAA membership on the training committee for the past 4 years. I have truly enjoyed meeting all the new financial aid administrators and delivering training to assist them in their journey. I am excited to see Mariah and Dawn explore the virtual options and training structure in the coming year and offer my assistance whenever and however I can.

I am now looking forward to delivering another amazing conference with the expertise of Cathy Sarabia from Texas Tech co-chairing alongside me, as well as a highly experienced committee.

Lastly, I want to thank the efforts and the board and training committee members and co-chair for the flexibility and encouragement while navigating the unique circumstances of this year.

Danchees (D.) Ingram & Mariah Fouriner  
2020 TASFAA Training Co-chairs

## Training Committee



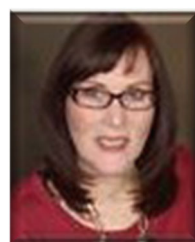
Dawn Coleman-Glenn  
Texas A&M University



Steven M. Lewis  
University of North Texas



Zackary Kruger  
University of Mary Hardin-Baylor



Arianna Gray  
Collin College



Kathleen Brown  
Southern Methodist University

# WEB SERVICES COMMITTEE

---



---

## Committee Chair

Kevin Armalay  
University of Texas at Austin

## Committee Members

---

Jennifer Sanchez  
University of Dallas

## Committee Activity

The 2019-2020 year has been a busy one for Web Services with the launch of the new TASFAA membership platform and website.

We started the year with a presentation at the October 2019 TASFAA Fall Conference, where we outlined TASFAA's digital evolution, and where we provided preview demonstrations of the new website. Shortly after the conference ended, we officially launched the new website.

The transition was not without its minor hiccups, but all in all, the transition was smooth.

We worked extensively with the membership committee through the winter months tweaking settings and massaging the system as we learned more about how it worked, and assisting member institutions and their staff with their memberships, passwords, and more.

In the spring, we partnered with several committees to launch their respective tasks:

- Nominations and Elections: launch nomination web pages and nomination form
- Training Committee: launch NAOW web pages and registration form
- Regional Training: launch Regional Training web pages and registration forms

We began the early stages of preparing and creating the "mini site" for the fall conference and were working on creating the post-event surveys for NAOW and the Regional trainings when everything was up-ended as the Coronavirus pandemic forced a rethinking of all of our events. In-person events were canceled, and work on the surveys and conference site were stopped.

Though COVID-19 put the kibosh on many of TASFAA's events, the initial build of the associated pages and forms laid the groundwork to make future years' implementation much smoother.

We added a COVID resource page to the site, sharing out some helpful information for the association's members and promoting some webinars and other resources.

Heading into the later part of the summer, we built the pages and form for the officers' election and worked with Membership to ensure the database was properly set up for the elections. We helped Nominations and Elections to run the election. We also prepared and launched the award nominations pages and award nomination form for the Awards and Scholarship Committee.

In the fall we prepared for the annual membership renewals and tweaked some configurations, yet still experienced a few hiccups related to a setting that was set during our initial conversion. We believe that those have all been addressed.

Lastly, we launched the volunteer interest form so that the 2020-2021 Board of Directors can solicit volunteers for the various TASFAA committees.

Through the entire year we explored and experimented with the various new technologies available through our new provider, and we learned a lot about integrating things like the calendar with the webpages to make an easy-to-navigate, easy-to-use website for our members.

I like to think of 2020 as our "Version 1.0" and that 2021 will afford the committee with opportunities to further refine the web experience of our members. We started exploring imbedded videos and will likely make more use of these advanced features as we move toward "Version 1.1" and onward.

For 2020, the Web Services Committee and Communication and Social Media Committee will be merging to leverage better integration of the two teams' strengths.

All in all, 2020 was a very productive and educational experience for the Web Services team, and we look forward to inching TASFAA closer to a constantly-evolving and improving online experience that will help TASFAA move forward into a future where virtual connection is more important than ever.

Thanks TASFAA!  
See ya'll at work...er...at home.  
(Did I unmute?)



The TASFAA Annual Report is coordinated and published by the  
Communications & Social Media Committee.  
Jason Edens, Committee Chair