

# CAPFAA Council Committee Report

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**Month and Year of Council Meeting**

**Committee Name**

**Committee Chair/Vice Chair/Co-Chairs**

*Please list the name and institution/organization.*

**Committee Members**

*Please list the name and institution/organization.*

**Consent Agenda**

- Needs a vote by Exec Council
- Needs to be discussed by Exec Council
- No Vote / No Discussion (Consent Agenda)
- Unsure...

**Formal Report**

*Please prepare a short qualitative and quantitative review of goals and initiatives planned/achieved for the year. The report should include, but is not limited to dates, audience/expected number of participants, speakers (if appropriate), location, revenue/expenses budget targets, where you will work with other committees or need assistance from the Executive Council.*

**Committee Expenditures**

*Please provide all expenses incurred since the committee's last report.*

**Items for Vote**

**Submitted By:**

**Dated:**

# CAPFAA Council Committee Report

## CBLAH Supplement, October 2024

Here are the items for discussion and vote. These decisions will help the Constitution and By-Laws committee proceed with sorting, organizing and streamlining Association records prior to a storage plan being determined. We will begin the discussion by motioning for outcome “a” for each question.

1. College Goal Sunday documents: We have about an 8-12” high stack of documents from College Goal Sunday – grant letters, budgets, steering committee meeting minutes, reports, promotional materials, etc.  
Should we:
  - a. Keep only a few key documents like grant award letters
  - b. Keep them all
  - c. Discard them all
  - d. Something else (amend the motion with specifics)
  
2. Presentation Handouts from over the years (see attached summary). We have another 8-12” high stack of handouts from various presentations at training events over the years.  
Should we:
  - a. Discard them all
  - b. Keep them all
  - c. Solicit volunteers to choose an assortment of handouts to keep
  - d. Something else (amend the motion with specifics)
  
3. Event Summaries: If CAPFAA wants summaries of the various events over the years, now is the time to do that, since I will be going through the file for each year’s documents anyway, to discard duplicates and non-essential items prior to Council making storage decisions. This could be something like:

### FALL TRAINING

Year	Date	Location	Registration Fee	# Attendees	Sponsor
1989					
1990					

The categories summarized could be as many or as few as Council wants, with the understanding that not all of the requested data will be found in the records for every year. Or, Council could decide that this is not something they want.

Should we:

- a. Create event summaries from the historical records, with the template for each event to be determined by council?

## Summary of Presentation Handouts

Year	CAPFAA Event	Subject	Presenter
1986	Mid-Winter Workshop	Automating the Financial Aid Office	Henry Miller, Consultant
1993		National and Community Service Trust Act	
1995	Annual Conference	Is College Education Affordable? An Economic Perspective	Jeffrey E. Hanson, DFA Northwestern University -Chicago
1996	Spring Training	Ethics in Financial Aid	
1996		Stress Management – “Dealing with the Pressure”	Thomas P. O’Hare, Regional Manager, CSLF
1996	Fall Training	Legal Issues and New Technologies	Robin S. Minor, Dow, Lohnes & Albertson
1996	Annual Conference	Everything you always wanted to know about Supervision	
1997		Direct Loans – A Better Way to Borrow	US ED
1997	Spring Training	Financial Responsibility	
1997	Spring Training	Home Equity – Borrowing “On the House”	Nina J. Musante, Bank of Boston
1997	Spring Training	Maximizing your Financial Aid Message	Judi Grassi, AMS Education Loan Trust
1997	Annual Conference	Standing Outside the Fire – Self Evaluation for Program Review Preparedness	CSLF
1997	Annual Conference	Creating Realistic Budgets	Tom Bradham, Asnuntuck Comm. College Phil Malinoski, Saint Joseph College
1998	Fall Training	Financial Aid for Non-Traditional Programs	Julie B. Savino, Sacred Heart University Mark E. French, Sacred Heart University
1998	Fall Training	Analysis of the 1998 Amendments	NCHELP and Education Finance Council
1998	Annual Conference	Federal Update	Tom Threlkeld, US DOE
1998	Annual Conference	New Pell Grant Reporting	Tom Threlkeld, US DOE
1999	Spring Training	Policies and Procedures	Mona L. Lucas, UCONN
1999	Spring Training	Understanding the MPN Process	Cindy Houlihan, Educaid Mike Friedman, American Express loans
1999	Fall Training	Regulatory Update	Gail daMota, CSLF
1999	Mini Training	Getting Ready for 2000-01	Dave Welsh, Tunxis Community College
1999	Annual Conference	Effective Financial Aid Communications in the E-Commerce Era	Judi Grassi, AMS Education Loan Trust
1999	Annual Conference	NSLDS – Today, Tomorrow and Beyond	Tom Threlkeld, US DOE

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1999	Annual Conference	Federal Update	Tom Threlkeld, US DOE
1999	Annual Conference	Understanding the MPN Process	Cindy Houlihan, Educaid Mike Friedman, American Express loans
1999	Annual Conference	Default Management	Elaine Nelson, Sallie Mae
1999	Annual Conference	Borrower Benefits	Will Shaffner, USA Group Sallie Mae
1999		The Future is Default Aversion	CSLF
2000		Web Page Design	Jim Kuhlen, CSLF Dominic Yoia, Quinnipiac University
2000	Spring Training	Electronic Fund Transfer	
2000	Spring Training	MPN – Past, Present and Future	Rich Goodenough, Nellie Mae
2000	Spring Training	Federal Update	Michael D. Sessa, American Student Assistance
2000	Spring Training	Follow that Loan	Claire Dwyer, Sallie Mae
2000	Fall Training	Student Right to Know – Required Consumer Notifications	Tom Threlkeld, US DOE
2000	Fall Training	Reorganizing Financial Services from the Customer’s Perspective	Ernest Huff, Yale University Deborah Glenn-Long, CSLF
2000	Fall Training	Federal Update	Gail daMota, CSLF
2000	Annual Conference	Presentation Skills 101	Daniel T Barkowitz, The Hunter Group ; F. Duane Quinn, American Student Assistance
2000	Annual Conference	Financial Aid 101: An Overview	Daniel T Barkowitz, The Hunter Group ;
2000	Annual Conference	Diversity – Recognizing and Valuing Differences in People	Leslie Mills, Bank of America
2000	Annual Conference	Fraud and Abuse in SFA Programs	Gary E Mathison, US OIG
2000	Annual Conference	Federal Update	Tom Threlkeld, US DOE
2000	Annual Conference	Return of Title IV Funds (R2T4)	Tom Threlkeld, US DOE
2001	Mini Training	Audit Requirements	John P. Tonkinson, CPA
2001	Spring Training	Encouraging Debt Management to Reduce Defaults	Betsy Mayotte, American Student Assistance
2001	Spring Training	FERPA	Tracy M. Nave, US DOE
2001	Fall Training	Federal Update	Nancy Ann Dooley, US DOE

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2001	Fall Training	The Pros and Cons of FFEL Consolidation	Deborah Glenn-Long, CSLF
2001	Fall Training	Calculating the Cost of Attendance	Sharon L Thomas, Middlesex Comm. College Elaine Solinga, Connecticut College Nancy Stanavage, Baran Institute of Technology
2001	Fall Training	Electronic Signatures and PLUS MPN	Sandy Barsom and Jim Kuhlen, CSLF
2001	Annual Conference	Uncovering the Secrets of School Reviews	CSLF
2002	Spring Training	Federal Update	Gail daMota, Education Finance Council
2002	Spring Training	Education Savings	Frank Resnick
2002	Annual Conference	Putting the Wind in your Sails – Where do you go to get your Energy and why does it matter?	John B. Molidor, Michigan State University
2002	Annual Conference	Port of Call – How do you face the world? And what do you show others?	John B. Molidor, Michigan State University
2003	Frontliners Training	Documents, Documents, Documents	
2003	Frontliners Training	Etiquette in the New World	Kerry Davis Jacob, Citizens Bank
2003	Annual Conference	New Paradigms in College Affordability	Janet A. DaSilva, DaSilva and Associates Paul J. Gilroy, ProEducation Solutions John W. Lind, Southwestern University
2003	Annual Conference	Emotional Intelligence	Bob Cole, American Student Assistance
2003		Identity Theft: Finding Yourself in All the Wrong Places	Deborah Glenn-Long, CSLF
2003	Financial Aid Fair	Financing a College Education	Dominic Yoia, Quinnipiac University
2003	Financial Aid Fair	Financial Aid 101	Dave Welsh, Tunxis Community College
2004	Comprehensive Training	I Love Loans	
2004	Spring Training	PLUS MPN – Are You Ready	Cindy Ryan, Educaid
2004	Fall Training	Federal Update	Deborah Glenn-Long, CSLF
2004	Fall Training	Saying “NO” with Tact	Mark French, Nellie Mae
2005	Frontliners Training	Documents, Documents, Documents	Heather Hamilton, Quinnipiac University Vanessa Richmond, CT Center for massage Therapy

<b>Year</b>	<b>CAPFAA Event</b>	<b>Subject</b>	<b>Presenter</b>
2005	Fall Training	The Critical Role of Financial Aid in Enrollment Management	Lana Lowe, Financial Literacy Research, College Loan Corporation
2005	Annual Conference	How to Communicate with Washington	Eileen O'Leary, Stonehill College
2005	Annual Conference	Setting Standards for Measuring SAP	Deborah Glenn-Long, CSLF
2005	Annual Conference	Conducting Financial Aid Research	Phil Malinoski, Saint Joseph College
2006	Annual Conference	College Goal Sunday	Ivette Rivera-Dreyer; Glenn Cassis
2007	Spring Training	Understanding Needs Analysis	Deborah Glenn-Long, CSLF
2007	Fall Training	The Wild West – Ethics Controversies	Deborah Glenn-Long, CSLF
2007	Annual Conference	FERPA Issues	USA Funds
2007		Financial Aid 101	Dominic Yoia, Quinnipiac University
2007		Meeting Maker – Get Everyone Rowing in the Same Direction	Deborah Glenn-Long, CSLF
2008	Spring Training	Security Issues and the Impact on the Student Loan Industry (the subprime mortgage fiasco)	Mark Valenti, CSLF
2008	Fall Training	FERPA and Gramm-leach-Bliley	Shawn C. Monk, American Student Assistance
2008	Fall Training	SAY vs BBAY	Debra S. Eddy, DSE Associates
2008	Fall Training	A National Conversation Initiative	NASFAA
2008	Annual Conference	Financial Aid Websites	Matthew Long, Yale university
2008	Annual Conference	Loan Counseling	USA Funds
2008	Annual Conference	Policies and Procedures – Developing a P&P Manual	EdFund
2008	Annual Conference	The Community Campfire	Deborah Glenn-Long, CSLF
2008	Annual Conference	RFI – Lender Selection Process	Elaine Solinga, Connecticut College Dominic Yoia, Quinnipiac University Steve Wynne, Sallie Mae
2011	Annual Conference	FERPA Privacy Guidelines in Financial Aid	
2012	Annual Conference	Verification	USA Funds
2012	Annual Conference	Professional Judgement	USA Funds
2012	Annual Conference	MS Excel for the Aid Administrator	Dominic Yoia, Quinnipiac University

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2015	Tax Workshop	Tax Returns, Tax Transcripts and Financial Aid	Robert Weinerman, Iron Bridge Resources
2015	Fall Training	The FISAP	Bill Mangini, Consultant
2015	Annual Conference	Choose Your Own Adventure - Verification	Zack Goodwin, US DOE
2015	Annual Conference	Creating and Effective Default Prevention Plan	Joe Jovell, Great Lakes
2016	Tax Workshop	Tax Returns and Financial Aid in the PPY World	Robert Weinerman, Iron Bridge Resources
2017	Fall Training	Beware of Debt Relief Companies	Ashley Norwood, American Student Assistance
2018	Annual Conference	COD Message Classes	
2019		Secrets of a Successful Student Employment programs	Rebecca Bentley, UCONN
2019		Developing Successful Student Employees	Cindy Garrison, UCONN
2021	Annual Conference	Behavioral Economics	Deborah Glenn-Long
2022	Annual Conference	If Disney Ran Your Financial Aid Office	Deborah Glenn-Long
2022	Tax Workshop	Verification and Conflicting Information	Robert Weinerman, Iron Bridge Resources
		Effective Goal Setting in 12 Steps	Ellen Hefferman, The Spelman and Johnson Group
		Verifying, Updating and Exercising Professional Judgment	Deborah Glenn-Long, Yale University
		TIAA CREF	Pierre M. Dejean, CFP; TIAA-CREFF
		The Leadership Secrets of Santa Claus	Deborah Glenn-Long, CSLF
		Customer Loyalty	Brian Cox, TERI
		Creating Outstanding Customer Service Success	EDFUND
		Debt Management	Access Group
		Understanding Trusts and their Impact on Financial Aid	Susan B. Pochal, Washington Trust Company
		Financial Aid Strategies to Promote College Affordability	Gus Dominguez, Amherst College Jan Fuller, MT. Holyoke College
		Comprehensive financial Planning	Jonathan N, Browning, CFS

Year	CAPFAA Event	Subject	Presenter
		Assessing and Communicating Payment options	Karen Hook, Wesleyan Sheila Checkoway, Key Education Resources
		Undergrad to Grad – What students should know before they arrive	Odette Franciskino, Quinnipiac law Jennifer Fuhrman, University of Hartford Caesar Storlazzi, Yale University Pam Nyiri, Yale School of Medicine