Meeting Attendees

Castleton University: Kathy O’Meara
Champlain College: Greg Davis, John Lanzetta
College of Saint Joseph: Julie Rosmus, Haley Shortsleeve
Community College of Vermont: Michael Griffith, Ryan Dulude
Goddard College: Beverly Jene, Shannon Trainor
Marlboro College: Cathy Fuller
Norwich University: Jennifer Tosi
Saint Michael’s College: Matthew Desorgher
Southern Vermont College: Susan Rochette
University of Vermont: Donna Stevens, Laurie Fay, Renee Blanchet
VSAC: Deborah Lessor, Linda Thatcher, Marilyn Cargill, Melaney Wald
Vermont Technical College: Cathy McCullough, Liz Clark

Call to Order 9:23am

OFFICER REPORTS

President’s Report – Greg Davis

EASFAA Updates
- 200+ people registered for May Conference to date.
- Still time to register.
- Monday night President’s Reception will be at ECHO.
- Greg submitted his 11th and final state report.

NASFAA Updates
- The regional force is in preliminary stage and may draft a proposal on how the information sharing may work.
- NASFAA credential trainings will no longer be offered via webinar after webinar trainings already scheduled are finished.

VASFAA Updates
- Special election will be held for treasurer elect to give that individual time to learn the ropes from Mike.
  - If interested contact Greg, Mike or Matt.
- Conference Updates
  2017
  - No conference
2018 (June 5 & 6)
  o Hilton agreed to postpone our contract.
  o 32 room block & reduction in food minimum for a savings of $10,000.

2019
  Location
  o Will want to get bids out for conference location soon.

  Structure/Sessions
  o All in favor of Admissions, Business & Bursar’s Office track at conference to increase attendance and networking on campus.
  o Suggestion for session on “One Stop Shopping” schools
    ▪ How they make a joint Student Accounts/Financial Aid office work.
    ▪ Why they use that model.

Joining Forces with NH
  o Matt is in preliminary conversations with NHASFAA (NH) to discuss ways VT and NH can join forces to collaborate.
  o Possibly alternate VT/NH location every other year.
  o Could attract more vendors.
  o Increase attendance #’s.
  o Joint Conference Committees.
  o Would the “visiting” state feel like visitors vs. part of the conference?
  o Could open up the option of a fall/October conference for VT.
  o If NASFAA continues to move their conference earlier in the year it may present a challenge for us to schedule presenters.
  o All are in favor of VASFAA sponsoring Matt to attend NH conference this fall to scope it out and make connections.

Federal Outreach
  ▪ VASFAA all in support of executive counsel e-mailing on behalf of VASFAA supporting continuing Perkins Loan.
  ▪ Schools can individually decide beyond that the level to which they will support the program.

President Elect Report – Matthew Desorgher
  NASFAA Leadership Conference
  • Matt recently attended NASFAA Leadership conference and participated in the state association track.
  ▪ He connected with Sanders’ Education Staff Member on the hill while at the conference and this same representative responded to the letter VASFAA sent highlighting the impacts of the DRT issue.
  ▪ Association Governance was discussed.
If there’s a controversial topic to vote on would VASFAA know who, at each institution, is authorized to cast the vote?
  o General consensus VASFAA does not know and each institution does know.

**Fall Training**
- If there’s a hot topic for VASFAA training, there is interest in having training in the fall.
- Some feel less training is needed and more of an awareness of what’s on the forefront with a federal update.
- Zack Goodwin’s territory changed to Chicago area.

**Secretary’s Report**
Cathy Fuller motioned to approve.
Kathy O’Meara 2nd the motion.
Motion passed unanimously.

**Treasurer’s Report – Michael Griffith**
- One vendor payment expected in the next few weeks.
- Two schools with outstanding dues to pay.
- Profit from dues will remain lower than it was in recent years as a result in reduction in staff at VSAC.
- No vote needed on Treasurer’s report.

**DISCUSSION ITEMS**

**EASFAA Conference**

**Local Arrangements Table**
- VASFAA volunteers needed for Sunday afternoon and Monday to staff the local arrangement table. Greg will send a list for signing up.

**Charity Support: King Street Youth Center**
- VASFAA is donating a $100 gift basket. Meg Davis will purchase/build basket.
- Additional donations are needed. Can be at an individual level or institution level. Contact Greg for more information.
- T-shirts for sale $20. Order ahead if you want a specific size.
- King Street Lemonade Stand will be present at the conference with the kids staffing the stand.

**VASFAA Business Meeting**
- Monday 5/8/17 @ 3:30pm-4:15pm.
- Greg will invite Justin Draeger.
- Official Transition of President Role.
Verification and Comment Code 399

- Students with work-study are forced to move to regular student employment so they can get paid.
- Most students also selected for verification.
- Seeing students get 399 code for 17/18 and correct the tax information. That data used to fix 16/17, and then student is selected for late verification for 16/17.
- Able to resolve many students who used DRT in 16/17. Takes effort to resolve in this manner but schools are able to do so without needing much from the student.
- Some schools remove aid and block registration until student’s resolve.

IRS DRT

- Listserv is a good place to capture tips/suggestions/known items.
- VASFAA can also get roadblocks for high need families in front of delegates.

   **Tips/Suggestions/Known Items:**
   - Families not able to get through to IRS via phone.
   - In person at IRS office, need an appointment.
   - When requesting tax transcripts online can’t get through the process if using a pre-paid phone.
   - Misconception the issue is on the school’s part not the federal government.
   - Transcripts via mail take 5-10 days.
   - Can use third party to verify taxes – *veri-tax*
   - IRS Office Finder online can find phone number to local office to make an appointment.
   - Using form 4506 to request a copy of a tax return can take 75 days and doesn’t mention form will reject if items are crossed off or changed.
   - 4506-T requests less information so lower risk of errors.
     - May not provide all info needed.

Meeting adjourned at 11:28 am

Minutes documented by Melaney Wald