

VASFAA Spring Business Meeting  
Three Stallion Inn, Randolph, VT  
April 12, 2017

**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 11<sup>th</sup> 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)**

- Hilton agreed to postpone our contract.
- 32 room block & reduction in food minimum for a savings of \$10,000.

## **2019**

### **Location**

- Will want to get bids out for conference location soon.

### **Structure/Sessions**

- All in favor of Admissions, Business & Bursar's Office track at conference to increase attendance and networking on campus.
- 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**

- Matt is in preliminary conversations with NHASFAA (NH) to discuss ways VT and NH can join forces to collaborate.
- Possibly alternate VT/NH location every other year.
- Could attract more vendors.
- Increase attendance #'s.
- Joint Conference Committees.
- Would the "visiting" state feel like visitors vs. part of the conference?
- Could open up the option of a fall/October conference for VT.
- If NASFAA continues to move their conference earlier in the year it may present a challenge for us to schedule presenters.
- 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?
  - 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 2<sup>nd</sup> the motion.  
 Motion passed unanimously.

### **Treasurer's Report – Michael Griffith**

- One vender 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.
  - <https://apps.irs.gov/app/officeLocator/>
- 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