

CCCSO FARR Meeting

March 21, 2005
Sacramento, CA

In attendance: Andi Schreiberman, John Muskovitch, Patty Falero, Richard Quintana, Karen Micalizio, Richard Rams, Hilda Maldonado, Joann Bernard, Pat Hurley, Steve Arena, Brad Hardison, Tim Bonnell, Cynthia McFarland, Charles Mawson, Alvin Jenkins, Craig Yamamoto, Jill Schertz, Kris Shear, Carl Poole.

State Issues:

Updates are being posted to the CFAO-ALL and to CEOs list on a regular basis by the Chancellor's Office. Also, Scott Lay is posting the League Legislative Updates to the CFAO-All list. There is a new address for web information on bills: www.leginfo.ca.gov then select bill info, select by bill # in the current session, or by author or key word. Rumor has it that any bill that has a cost attached to it will probably be suspended. In particular, the bill to change age requirements for Cal Grants will more than likely be suspended. Tim discussed AB358, Liu's bill that ties Cal Grant award amount to a formula for CSUs, UCs and independent colleges. More discussion will follow at this afternoon's meeting with CASFAA.

Chancellor's Office has reinstated providing a federal update, typically issued once per month. Jill inquired about TRIO funding, Tim responded that the Chancellor's Office is tracking this and will stay involved. California has a significant and large portion of funding for these pre-college programs; has the most to lose if funding is cut.

Handout on Fee Policy from the LAO: Recommends enrollment fee increases at CCCs based on not maximizing tax credits for Californians attending CCCs. There are some flaws in assumptions, including all students are not full-time, etc. Fees need to be stable and predictable, not large increases at the last minute prior to fall term start. Board of Governors has taken a position of no fee increase for 2005-06 based on the large increases the last two years.

CCCCO Issues:

Handout of performance indicators from 2003-04, showing 2003-04 financial aid recipients, and whether or not they were new to financial aid, new to the system, etc. during the 2003-04 year. These numbers show increases (particularly in certain gender, ethnicity groups that were targeted to preserve access for) as a result of both outreach and inreach. Any questions regarding the numbers and how they were determined should be referred to Tim Bonnell at the Chancellor's Office. These figures will be included in an upcoming report to the Legislature. These figures, together with the Pell and BOG numbers circulated in February, combine to provide evidence of the importance of the SFAA augmented funds in ensuring access to the CCCs.

BFAP Form 2s will be due April 8 to the Chancellor's Office. Schools that will not spend all of their funds this year should de-obligate to avoid a dollar-for-dollar penalty at the end of the year. Also, requests for additional funds should also be made at this time. Preliminarily, it looks like most schools will be spending most of their funds and that there will not be the large amount of de-obligated funds that there was at this time next year. Question was asked about roll authority for funds this year; Tim will communicate with the CFAO-ALL list about this. Probably will only have roll authority if the state budget is significantly late.

Map circulated of all CCCs statewide.

Trainings: CCCApply Workshops April 12 and 14, schedule of trainings handed out for MIS trainings, upcoming MIS training at CCCSFAAA Spring Flings.

There is some confusion/concern about CCCSFAAA's white paper on the Laird bill/Heath Fee issue. It was clarified that CCCSFAAA's statement in the white paper regarding EOPS offices being able to pay the health fee for EOPS students as an allowable expense, but it was not CCCSFAAA's intent to commit them to, or tell them to, do this. CCCSFAAA pointed this out as a possibility, and concern, in its white paper. The concern is that EOPS has a finite amount of funding, and if this new expense of paying health fees for

EOPS students is put into place at a campus, there are then fewer dollars for other direct services to EOPS students.

Susan shared an analysis of her college's Health Center's revenue stream, and enrollment and BOG figures for the past five years. Her concern is that her data shows that the health center has not had a large decrease in revenue due to increases in BOG #s, and the additional revenue projected if the Laird bill passes would be significant. Her concern is that this revenue increase would be funded by the poorest students attending her college. Discussion ensued; all agreed that there are concerns surrounding the Laird bill. This issue is highly political and will continue to be so if it passes because individual colleges/districts will then decide locally to possibly waive the fee for students at their college. Alvin, on behalf of the EOPS Association, understands CCCSFAAA's intent and indicated no "damage control" is needed, but invited CCCSFAAA to the next EOPS meeting, Karen and Kris will attend on 4/25.

Note: It is now the CCCSystem Office, not Chancellor's Office.

Brief information shared on a possible new scholarship opportunity, funded by the Mexican government for Mexican citizens. Could be at both the UC and CCC level and could be piloted for the 2005-06 year as a fast-tracked pilot program. More information to follow as it becomes available.

"The Dark Side", an article about financial aid abuse at community colleges for student athletes, was distributed. There have been some federal indictments, and if this issue is perceived as a widespread problem in the community college system, California has a large population and would be involved in any type of investigatory initiative by the OIG. The CCCSystem Office would like to know about any inappropriate financial aid practices at any CCC for athletes; they will assist with any clean up or corrective action that should be put into place now, to meet "prudent practices" before any type of federal investigation is initiated.

2005-06 BOG Program Manual draft was circulated and reviewed. Changes incorporated include areas related to GTO, Registered Domestic Partnerships, EIC, etc. Concerns regarding including EIC and Additional Child Tax Credit in income was expressed. Tim will schedule a conference call with Linda M. regarding this issue. Then an updated and current version of the manual will be sent out via CFAO-ALL in several weeks.

Adjourned at noon for joint meeting with CASFAA after lunch.

JOINT MEETING WITH CASFAA

Reconvened for joint meeting; Introductions all around.

Susan Jones distributed CCCSFAAA's goals and objectives that were developed at the October 2004 transition meeting. She also distributed the new (and beautiful!) CCCSFAAA outreach brochure. Reviewed the list of goals with the group. There was some discussion on CCCSFAAA's goal to be recognized by NASFAA, the Chancellor's Office and CCCSFAAA's organizational structure and positioning on issues, etc. Current membership is just over 600.

Joanne Brennan verbally shared CASFAA's goals for the year, developed at a President's retreat. Highlights included engaging a lobbyist, more activity in Sacramento, advocacy and information sharing with membership, update policies and procedures, budget cuts and concerns, partnering with other agencies that overlap with financial aid, assess membership needs and encourage new members, sponsor leadership conference this year, training and more training, expand website usage, develop a consensus building model for issues, expand use of technology, win a NASFAA award, mentoring new members and CASFAA leaders. Current membership stands at 1611 members.

State Issues: Louise Jones/CASFAA and Karen Micalizio/CCCSFAAA. Still keeping an eye on the CPEC/CSAC merger issue; Day at the Capital is tomorrow; following various state bills related to financial aid. Handout regarding state issues was distributed, with an update on several bills affecting financial aid.

Refer to website: www.leginfo.ca.gov for current updates. Some discussion ensued regarding constituency representatives in our organizations, and the latitude (or lack of it) to take official positions on issues.

Federal issues: Colleen MacDonald/CASFAA and Rick Rams/CCCSFAAA. Six folks from CASFAA, WASFAA and CCCSFAAA attended NASFAA Leadership Institute and did some politicking while in Washington. Although weren't able to meet with as many folks as hoped, did meet with several influential folks and were able to distribute materials to many others. Regarding reauthorization, spoke to increasing Pell authorization, maintaining Perkins funding, aggregate loan limits, Direct and FFELP coexisting, loan consolidation, etc. Feedback was that it's a zero-sum game and to get more of one thing requires giving some or all of something else up. Shortly after that series of meetings, there was movement on Pell increases, Perkins funding, etc. so attendees are hopeful that their sharing of information on Capitol Hill made a difference for our students.

Advocacy/Tim Bonnell: Coordinated tomorrow's activities, including the discussion panel. Also looking forward to a fall advocacy day, putting forward some statewide and nationwide proposals. Needs membership from each system, has CSU and CCC rep, needs other two segments.

No CSAC update, Max not in attendance and no substitute present.

Wayne Mahoney thanked Justine, CASFAA's general counsel, for her volunteered time. Justine is success story. She had been accepted to law school, but needed financial assistance to go, had decided not to. Wayne encouraged her, secured loans for her and she graduated third in her class and has a successful practice now.

Donna Hubert from CLFE gave a brief presentation. Website is CLFE.org; they are getting their name out there more since many current FADs are not aware of them. CLFE stands for California Lenders for Education and is a membership organization that welcomes CCCSFAAA participation and provides a discussion forum between schools, lenders and guarantors. Some discussion and explanation about the Loan Advisory Committee, CLFE's membership and participation, etc. ensued.

Then discussed GAC, LAC and limited meetings, concerns about input into decisions being made without broad-based input. Tim to coordinate advocacy efforts in this area.

Adjourned at 4:27 pm.

Continuation of FARR Meeting after CASFAA Day at the Capitol.

Tuesday, March 22, 2005 at 2:15 pm.

Paige Marlett-Dorr, Mark Kleinman and Courtney Pasqual from Crocker/Flanagan presented current samples from the statewide media campaign. Some discussion followed, particularly about the message of "Go to college; we'll pay for it." with no qualifying language. Financial Aid offices are having students coming in that are not eligible and are upset that their college costs are not being paid for. In general, it was agreed that the "action" strength of the message is working on the target audiences, and the lower number of folks that come in upset are worth the trade off; no media piece will serve all audiences and service populations. Also discussed creating a feedback loop to review campaigns after they run, and a heads up to area FADs when a campaign is about to run.

Discussed the idea of corporate sponsors for this campaign in the future, particularly to cover the cost of collateral materials for the campaign. Concerns were expressed over the strength of the corporate message, loss of creative control, etc. To be discussed more in the future.

Susan Jones discussed the goal/idea of having May be the "Community College Financial Aid Awareness" month, with as many community colleges as possible holding outreach events that month, letting students know that it's not too late to access aid for the upcoming school year. Reasons for holding it in May

include the need for high school students to get Cal Grant GPA verification forms completed before the high schools close for summer and the need to have students complete their FAFSA in time to be (hopefully) processed by the start of fall classes. Crocker/Flanagan will work with CCCSFAAA and CSAC jointly to launch some sort of campaign for these May events.

Scheduling of future meetings: June meeting will be at the Bahia in San Diego, August meeting will be in Sacramento.

All Director's gathering: will be scheduled in mid to late June. Tentative agenda items might include BFAP goal-setting, state issues, federal issues, etc. Will be held in Sacramento, as a two day, one night gathering.

Adjourned for the day at 5:00 pm.

CCCSFAAA EXECUTIVE BOARD MEETING

Wednesday, March 23, 2005

Sacramento, CA

Susan Jones called the meeting to order at 8:40 am.

Those present include: Susan Jones, Steve Arena, Beth Asmus, JoAnn Bernard, Jacque Bradley, Jill Schruz, Andi Schriebman, Tim Bonnell, Marco DelaGarza, Hilda Maldonado, Kris Shear, Craig Yamamoto, Karen Micalizio, Rick Rams, Richard Quintana, John Muskovitch.

Minutes of the February 2, 2005 meeting were presented and reviewed, several corrections were made. Moved by Steve, seconded by Craig to approve these minutes as corrected. Motion carried unanimously. Kris noted changes on hard copy, will forward to Judy. Beth to submit to Judy revised section on Webmaster report. It was suggested that we identify (in bold, italics, etc.) the motions, seconds and amendments to make them clear in the context of the rest of the minutes. Also, identify topics, or returning to topics in bold or italics as headings to assist with clarity in the minutes.

Treasurer's Report: JoAnn circulated and reviewed the most current balance sheet and the 2005 budget. It was suggested that the past few years' scholarship revenue and expenditures be tracked and identified, to establish a separate scholarship fund. John, Susan and JoAnn to meet and review figures to establish the amount of our treasury that is from scholarship-related fundraising. Income section of budget adjusted to reflect, in Newsletter Income: \$1850 from Ads, \$1150 from Banner Ads. JoAnn also noted that an added line item expenditure of \$5200.26 was added as "Maureen Martinez Memorial", to include the \$5000 scholarship donation made in her memory and flowers for her memorial service. Jill moved and John seconded approval of the budget as amended. Motion carried unanimously.

The current travel form will be updated to reflect the annual IRS mileage reimbursement rate that has increased to \$.40 per mile. Current by-laws tie the CCCSFAAA related travel mileage rate to the IRS mileage rate.

2005 Conference Report: the theme will be "Mining Student Potential". Photo spots and assorted activities (may include donkey rides, etc.) are being planned to highlight the theme. John circulated a budget for this year's conference and reviewed the expenditures. Registration will open September 1 and close November 17, the last day for hotel reservations. There will be a \$50 late registration fee. Judy Cohen and Beth Asmus will be coordinating registration for this conference. Cost will be \$145 for registration plus \$30 for membership; 500 attendees are planned for with an additional 200 proprietary attendees participating in sessions for a \$50 fee that CASFAA will collect and forward to CCCSFAAA. Beth will work with ATAC to provide generic receipts that do not list line items of registration vs. membership costs. Much discussion ensued regarding the proposed 2005 conference budget and whether or not a profit on the conference should be planned for this year, to create a cushion for future conferences when financial aid offices may not be able to afford to travel their staff. Craig moved and JoAnn seconded that the conference budget be approved as presented. Motion carried with one abstention.

Federal Issues: Rick provided a handout with a summary of hot issues. There has already been some movement on restoring (i.e. not cutting) some of the programs listed in item #1. The federal issues portion of the CCCSFAAA web page is live as of March 21, and Rick will keep it as current as possible so that it can be an up-to-date and useful tool for members. Rick also floated the idea of supporting the formation of a student advocacy organization from California. During their visit to Washington for the NASFAA Leadership Institute and their meetings with political staff members, Rick and Karen were advised that student advocates, student stories, grass roots efforts, etc. are more effective and needed in the political process. They also heard that there is some concern in Washington that the student voice that is being heard is not necessarily representing all college students and their issues. Particularly with community colleges being sometimes criticized for lack of outcomes, Rick shared that the power of a successful student's message is needed and could be significantly influential. Some concerns were shared about the quality of information that these students would carry with them on complex financial aid issues. There was general support for the idea of supporting educated, California community college students in an

advocacy effort and for Rick to proceed with developing a plan for a student advocacy group to visit Washington to lobby on reauthorization issues. It was suggested that the plan include the group touching base with local politicians before going to Washington, for protocol's sake.

Jacque Bradley shared her recent visit with Steve Boilard from the LAO. She was able, in her meeting with him, to explain the negative impacts of further fee increases, and the holes in the logic behind the LAO's projections of Hope and Lifetime Learning tax credit savings for students with additional fee increases. She also discussed the need for predictable, reasonable and gradual fee increases, and explained the issues surrounding the CCC health center/BOG fee waiver crisis.

State Issues: Karen covered this item during the joint meeting with CASFAA last Monday.

Training: Spring Flings are planned and registration is strong: 339 registered as of this morning, with the numbers spread fairly evenly throughout the three scheduled locations. Susan will be attending all three Flings. Vendor support has been strong: cost is \$200 per site, \$500 to be at all three sites. Breaks were a \$500 sponsorship, lunch was \$750 and EdFund is sponsoring all 3 lunches. Program is on the web and all is set to go for tomorrow-the first one. Craig gave kudos to support staff at both San Joaquin Delta and Mt. San Antonio College for their support in making the Flings happen. Susan commended Craig and his committee for the work they've done to bring this year's Flings together on a tight timeframe. Susan also stated that she hopes to begin planning for the 2006 Flings before the end of this year. Craig will create an on-line evaluation, asking for suggestions for the program content of future Flings.

For the sake of time, Scholarship and SSC report deferred to next meeting.

Newsletter: Rick thanked everyone for their recent submitted articles; there is plenty to fill the first edition! The new newsletter will be forwarded soon for overall design and then will be printed and mailed in a few weeks. There will be no lender/vendor ads in the newsletter, only a reference to being made available by EFSI/BRAZOS. EFSI has agreed to a one-time only use of our mailing labels for the mailing of the newsletter. Lenders and vendors that previously advertised in the newsletter will be referred to banner ad opportunities on CCCSFAAA's website. Rick shared two color choices and the group supported the blue option unanimously.

Community College Outreach: This item was discussed at the FARR/CCCSO meeting Tuesday afternoon also. Regional representatives need to encourage schools in their regions to participate. Schools should begin planning their May events, as May will be "Community College Financial Aid Awareness Month". Susan, Tim and Paige will participate in a conference call soon to plan the details of this statewide effort. Schools should include general financial aid information, and assistance with FAFSA completion as part of their workshop/event, but are free to plan and advertise their events individually.

Web Oversight: (Three handouts given.) Beth reported that she is hard at work securing banner ads for the website; this functionality was Board approved at the last meeting. Cost is \$500 per 15 second interval. Multiple 15 second slots can be purchased. The Federal Issues web page is up and running, and the state issues page will be launched soon. Job ads will be live by April 15, there is no charge for placing these job listings. Development of both the banner ads and job ads are included in our original contract with ATAC, there has been no additional cost for this functionality.

Lunch break at 12:15 pm; reconvened at 1:15 pm.

Continued with web oversight report. Reviewed the handout regarding sponsorship levels; much discussion ensued. This sponsorship level program will be developed and applied to the 2006 year and conference; contacts with vendors have already been made for sponsorship for the 2005 conference. An ad hoc committee was assigned to review and develop sponsorship level benefits: John, JoAnn, Craig, Steve, Marco and Toni DuBois. John will convene the group. It was also suggested to use Ken, Gaynell and/or Amy as resource consultants for this project.

CASFAA SEGMENTAL REPRESENTATIVE: (Shared samples of various outreach materials that he has developed at Pierce College.) Marco asked to be kept informed on upcoming issues (i.e. goal of CCCSFAAA being recognized by NASFAA resulted in a reaction from CASFAA) so that he can best fulfill his responsibilities as the CASFAA liaison from CCCSFAAA. Discussion ensued regarding CCCSFAAA's relationship with CASFAA and the need for this Board to hear from our liaison if there are any relationship issues pending. Also discussed memorandums of understanding that exist between CASFAA and CCCSFAAA, the dynamics and makeup of the conference selection committee, and some of the history on conference planning. Beth summarized Marco's role as a liaison is to bring information back and forth between the two organizations' Boards. Marco asked Susan to reach out to Joanne Brennan about the NASFAA recognition goal, to clarify that it is about recognition of CCCSFAAA, and not an intent to separate from NASFAA.

Regional Representatives Reports:

Region 2(Jill) Clarified responsibilities on the Constitution Day program requirement; Los Rios is implementing a software conversion; Mendocino is out hiring for the fourth time for a Director, Region 3(Kris) Schools are busy with new year set-ups; Laney has a new VP of Student Services and is in the midst of a software conversion; last meeting was a conference call via CCCConfer and went well. Region 5(Steve) Meeting is difficult, getting informational response from region is challenging since they are spread out geographically. Using an e.mail distribution list and CCCConfer to meet was suggested. Spring Fling is scheduled for tomorrow. Region 6(Beth) Concern over cuts to FWS and FSEOG funding for the 05-06 year; College of the Canyons received a phone call from the Department of Education explaining why their funding decreased for next year. Region 7 and 8(Rick and Susan) Discussed the decrease in FWS and FSEOG allocations. There's a new fad at Citrus College-Lilia Medina. Keith Cobb is the interim Director at Cypress College. Compton College has been undergoing multiple program reviews and now is governed by an oversight committee. Currently their financial aid office is on the reimbursement process. Region 9(John) They invited EOPS folks to their last meeting in March. John is invited to the EOPS Director's meeting next month. The Maureen Martinez Scholarship fund has been endowed at SBVC, CCCSFAAA's donation will be in addition to this. There is also a memorial rose garden in her honor at SBVC. Sandy Clark is serving as an interim Director at SBVC during the vacancy. The permanent FAD position is out to hire now. College of the Desert would prefer to be posted as "College of the Desert" rather than "Desert, College of". Region 10(Hilda) Has not met this year, canceled meeting in February due to storm. Via e.mail, gathered issues from the region: lowering of FWS and FSEOG funding, health fee issue and concern over local waiving of fees, SouthWest was able to finally hire full-time staff with BFAP funding.

Financial Aid Retirees: Susan asked about retiree recognition-shall we do something? All agreed yes, the awards committee shall meet (Hilda, JoAnn, John and Beth) and bring back a recommendation. Hilda will convene the group. Regional representatives must get addresses for retirees and give the addresses to the President and awards committee.

Regions 9 and 10 will bring guests to the June meeting.

Meeting adjourned at 3:05 pm.