



June 3, 2015 Board of Directors Meeting: Minutes

The June 3, 2015 Board of Directors Meeting began at 2:01.

Michael Drulis started the meeting by introducing himself and requesting a roll call. On the call were Ellen Benowitz, Grant Gallagher, Kim Cole, Marissa Anema, Tracy Rimple, Stephanie Bittner, Barbara O'Neill, Michael Drulis, Greg Mayers, and Aidan Sander.

Grant Gallagher, a new Board Member, introduced himself stating his affiliation with Affinity Credit Union, noting he has been with them for 6 years, and with NJCFE for around 4 years. Stephanie Bittner of Clarify, also a new Board member, introduced herself and shared that she is the New Jersey Community outreach manager and works in the community teaching financial skills throughout southern New Jersey. She also said she has been involved with NJCFE for nearly ten years. She also commented on her involvement with the NJCFE Job Fair in Atlantic City and the success it generated. Elizabeth Elmore of Stockton University also introduced herself, and has been involved with NJCFE for nearly ten years. She heads a class that looks at financial literacy from birth to death and is involved in mentoring programs.

After introductions Michael Drulis thanked everyone for their participation and shifted to the upcoming symposium. Since taking over the symposium NJCFE has moved more from training teachers to reaching out to the community. The symposium now reaches more community leaders, in addition to teachers. Grant, the chair of the symposium committee, then commented. Grant stated that the Symposium would start with "Health Related Impacts" by Barbara O'Neill before two breakout sessions, with a panel discussion in between. Finally, the day would end with an award to Sammi the Rabbit.

The breakout sessions of the symposium were discussed next. These included spending addiction, retirement, understanding Social Security Insurance benefits, student loans, and insurance. Currently, Professor Klinger of RVCC has been selected for the "Retirement" session with other speakers needed. Regarding the spending addiction, it was decided a speaker with a behavioral science perspective should be obtained. Kim Cole volunteered for the "Student Loans" session and plans to focus on re-payment options currently available for federal loans. For the "Insurance" session, it was suggested the different types of insurance be mentioned along with predatory insurance.

The cost of the symposium was then discussed with free registration or a \$25 donation. Barbara O'Neill recommended NJCFE get promotional pieces together as soon as

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possible so they can be distributed to teachers before they break for the summer session. Michael Drulis noted the coalition wanted to generate a notification with headshots and full list of session and speakers to generate maximum excitement.

Michael Drulis then shifted to webinars and discussed the need for future webinars. Greg Mayers elaborated on previous webinars the coalition has done, including a webinar on financial aid on May 27th. Mayers also stated the need for webinars in June, July, September, October, and November. Michael implored the board to reach out and try and find some webinars. Grant Gallagher volunteered to reach out to a colleague and try and secure a webinar. Barbara O'Neill provided some insight into how webinars can be handled and the ease with which they are run. O'Neill also mentioned she would reach out those hosting the "Road to Financial Success" to secure a webinar host. Stephanie Bittner asked about college planning and volunteered to have a co-worker potentially host a webinar on the subject. Stephanie Bittner volunteered to host a webinar on credit, "Understanding your Credit, Credit Scores, and Credit Cards", in July.

Michael Drulis then updated those on the call with the efforts the coalition has made to secure Board members for the recently vacated seats. Grant Gallagher and Stephanie Bittner were selected and added to the Board of Directors with Patricia Berhau taking the Co-Chair of the Symposium Committee.

Partnerships were then discussed with Elizabeth Elmore discussing the efforts of Stockton. Elmore stated Stockton College will be working with the various departments on campus to try and get them to attend and sponsor sessions, promoting financial literacy. They plan to host a competition between the clubs with the highest winning club getting some prize. Tracy Rimple then shared what RVCC has been doing, focusing on workshops focusing on Credit Scores. Affinity Credit Union has volunteered to work with RVCC for a workshop that plans to educate students on the importance of credit scores. Educating people on the value of community colleges is also something RVCC has been focusing on. Elizabeth Elmore inquired about the America Saves project in Atlantic City and asked information be provided so that Stockton can participate in the project. Marissa Anema spoke on the fairs she has been involved with; stating 5 of the 7 fairs have been held, with the credit unions going to schools to educate students. Grant Gallagher stated the Affinity will also be on the Road to Financial Wellness and are hoping to promote the event.

The last item is the upcoming membership meeting. Currently no speaker has been selected and is traditionally a challenge with the end of the school year. As such a strong



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speaker is best. Michael requested the board think of a good speaker and make suggestions.

The meeting was adjourned at 3:01 PM.



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